GrantSolutions℠
PARTNERS IN INNOVATION

Application Review Module (ARM)

Monitor Manual (Review Director, Panel Manager, Panel Monitor)

December 2022

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Table of Contents

What's New in this Version

1. **Process Model 8:** This is a new process model to ARM. All Chapters have been updated to include information about Model 8.

2. **Chapter 1: Accessing ARM**

   • **Update to the ARM Homepage** - All Users will click "Login with SSO" to access the GrantSolutions login page and the **Setup SSO section** has been removed. (See Section 1. Logging into GrantSolutions and Accessing ARM (Non-Federal Users) and Section 2. Logging into GrantSolutions and Accessing ARM (Federal Users)).

3. **Chapter 3: Monitoring the Review Progress**

   • **Update**: Application status include statuses specific to Model 8 (See Section 1. Understanding Application Status).

   • **New Section:** Model 8 Evaluating Progress by Application (See Section 8. Evaluating Progress by Application (Model 8 only)).

4. **Chapter 4: Reviewing Individual Applications**

   • **Update to the Summary Report –** Score table will display Sub-Criterion (See Section 2. Viewing the Summary Report (Panel Managers/Review Directors).

5. **Chapter 5: Panel Manager Role (Model 5)**

   • **New Section/Function:** Recalling a Summary Report (See Section 3. Recalling a Summary Report).

6. **Chapter 6: Review Director Role (Model 1, 2, 4, 5, 7)**

   • **Update:** Reject button changed to Return button (See Section 2. Returning the Summary Report).

   • **New Section/Function:** Recalling a Summary Report (See Section 3. Recalling a Summary Report (Model 1 and 5)).

7. **New Chapter:** Chapter 8: Review Director Role (Model 8)

8. **New Appendix**: Appendix A: Role Definition

9. **Updated terminology** – **Final Summary Report** changed to **Summary Report.**

Chapter 1: Accessing ARM

Overview

This section covers the login process for Non-Federal and Federal Users and how to access ARM.

1. Logging into GrantSolutions and Accessing ARM (Non-Federal Users)

New ARM 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, new users are required to change their **temporary password** and are required to set up **Multifactor Authentication.** Access to ARM is only provided once the session is opened.

Returning ARM Users use their already established login information and login method to access ARM. **Note:** They can reset their login information from the GrantSolutions login page (See Section 3. Forgot Username or Password) and will only be able to access the session once it is opened.
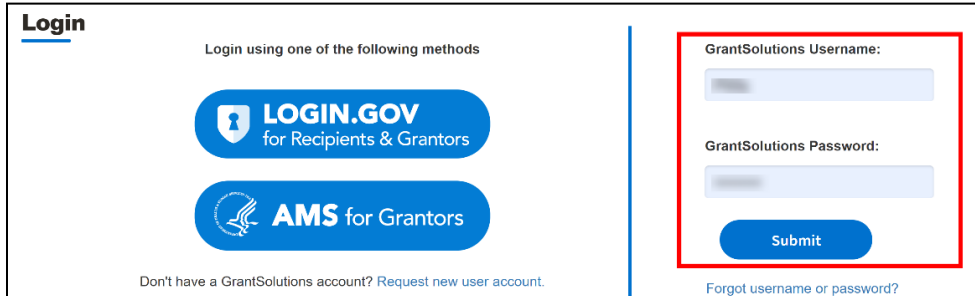
Important: The majority of Non-Federal user's login method will be username/password however if a user is a current grant recipient or has previously been a grant recipient then their login method may be **Login.gov for Recipients & Grantors.** Session Administrators are able to provide users with their correct login method.

To log into the GrantSolutions Application Review Module:

1. Click the **Login with SSO** button.
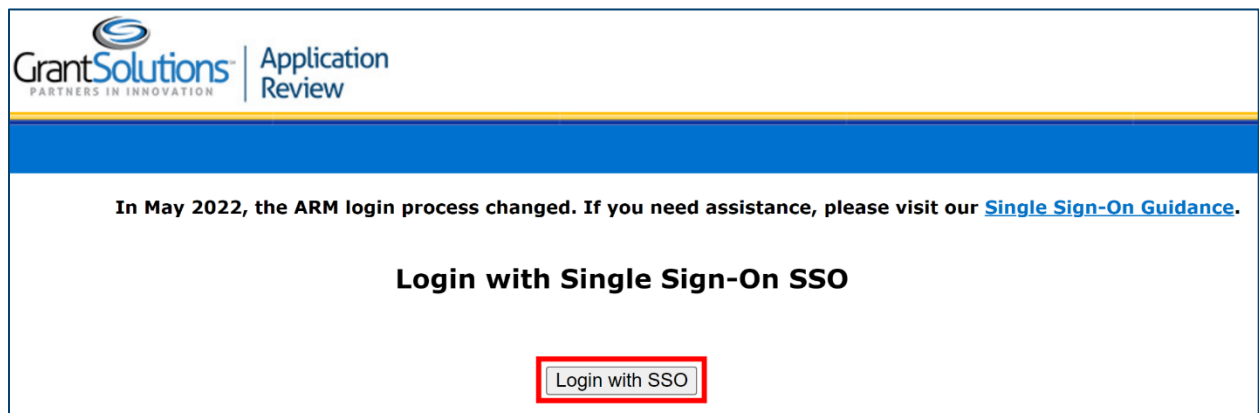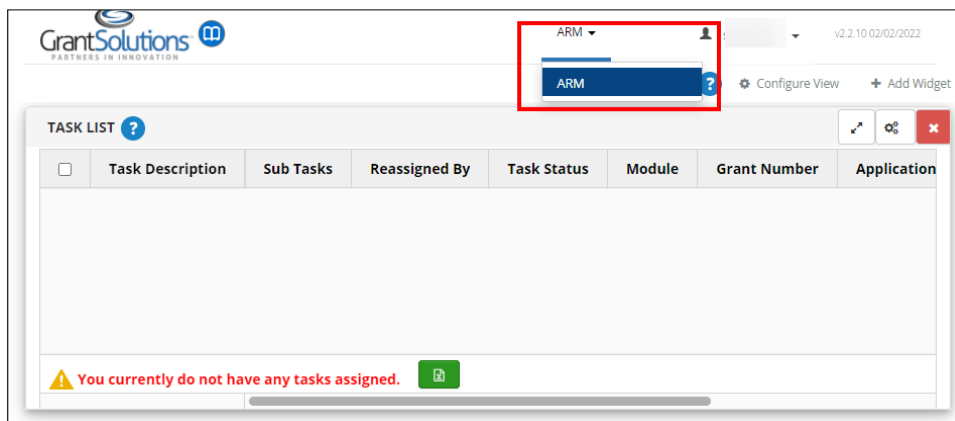
2. Enter your **username** and **password** then click **Submit** to log in. **Note:** New Users enter their temporary password which they will be required to change.
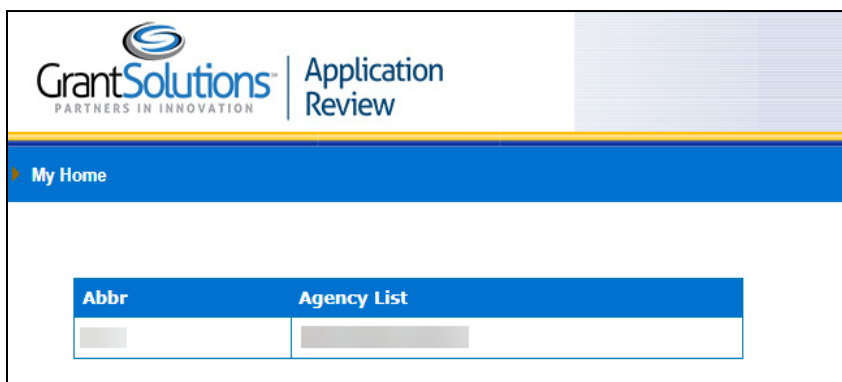
3. Complete **Multifactor Authentication**.

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 GrantSolutions and Accessing ARM (Federal Users)

Federal users are required to use their **Personal Identity Verification (PIV) ID** to access ARM. **Note:** Federal users cannot access **ARM** using a username and password.

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

Important: Federal users will either use **Login.gov for Recipients & Grantors** or **AMS for Grantors (HHS Staff)** to log into GrantSolutions and access ARM. Session Administrators are able to provide users with their correct login method.

To log into the GrantSolutions Application Review Module:

1. Click the **Login with SSO** button.
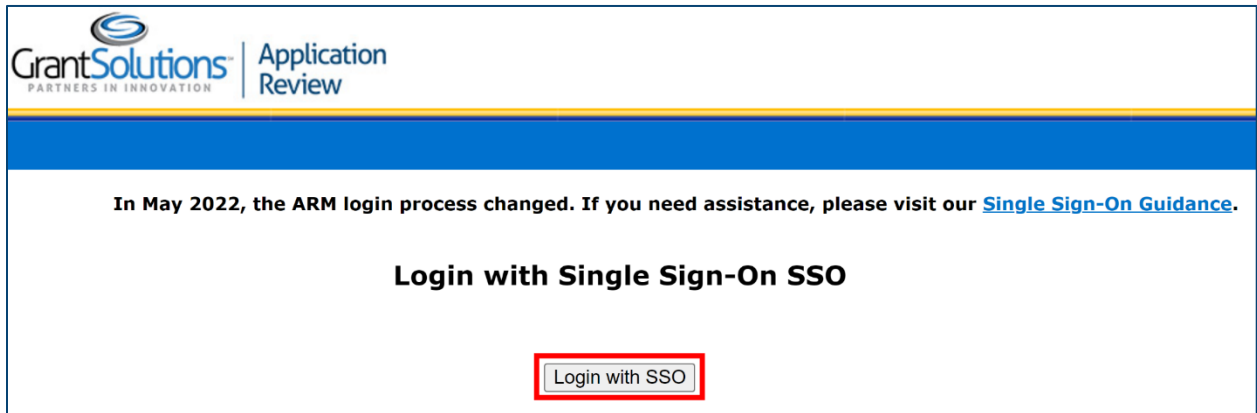
2. From the **GrantSolutions Login** screen, click the **Login.gov** button or click the **AMS for Grantors** button.
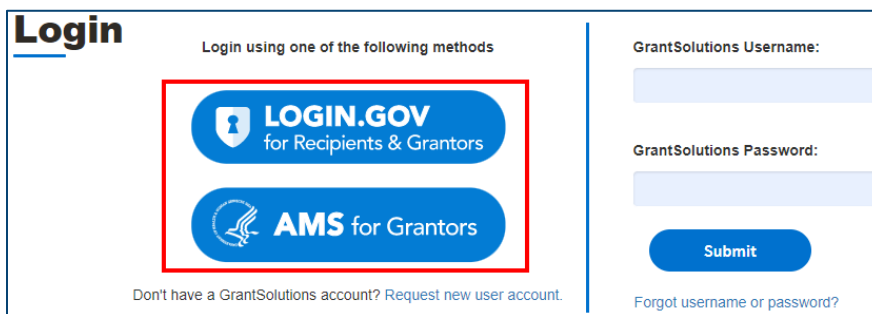
3. If using **Login.gov**, click the Sign in with your government employee ID link on the Login.gov Sign in screen.

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.
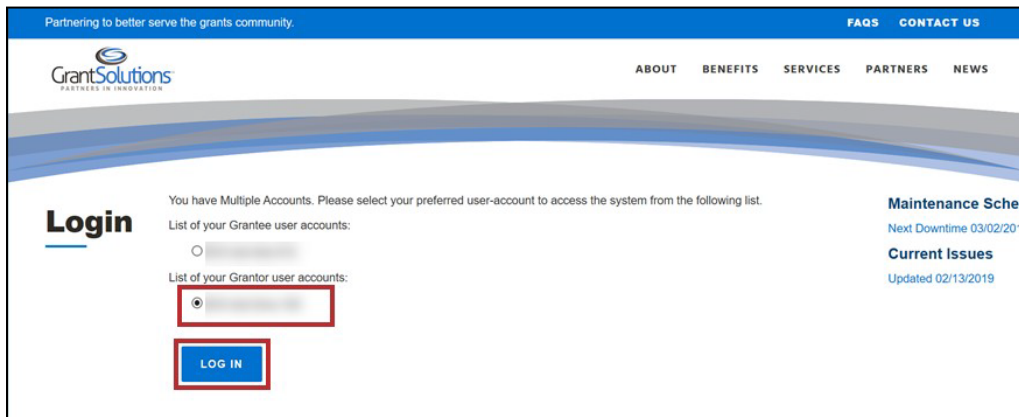
5. On the GrantSolutions dashboard, click the **ARM** link from the **ARM dropdown** menu.
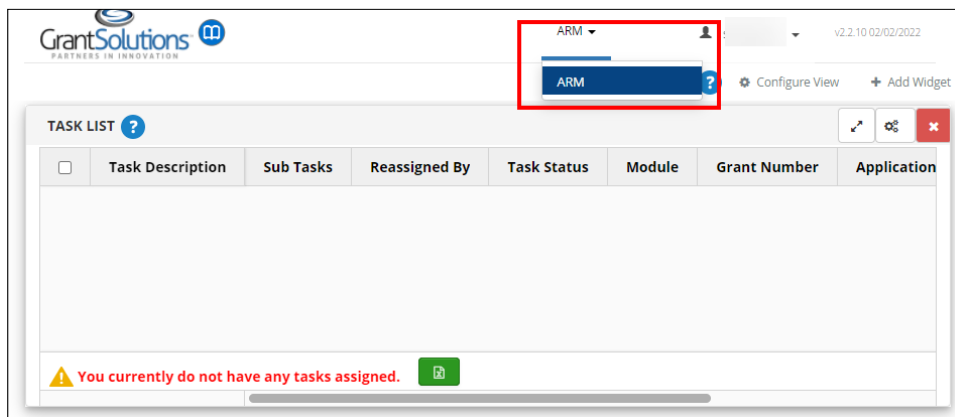
6. You will now have reached the **ARM Agency** page.
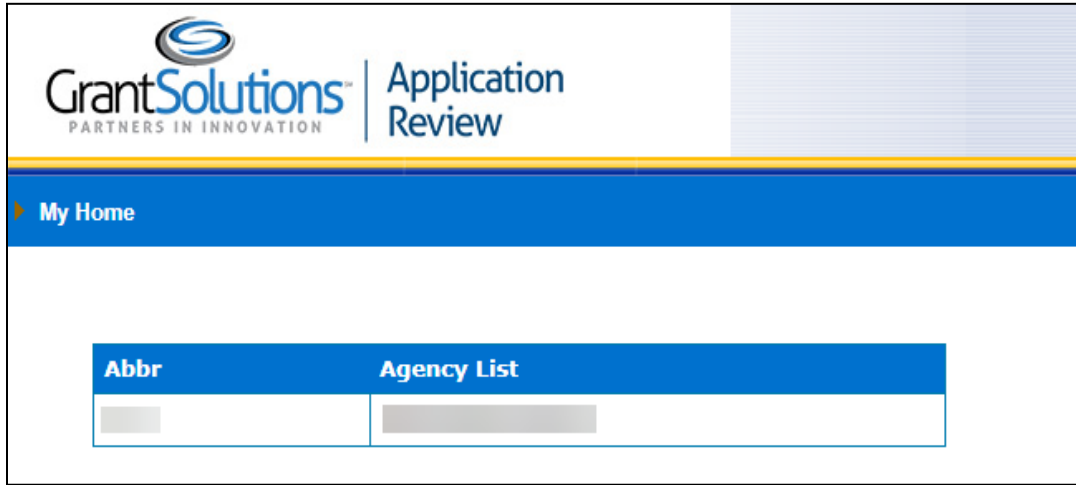
3. Forgot Username or Password

This section is only for users whose login method is username/password. 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.
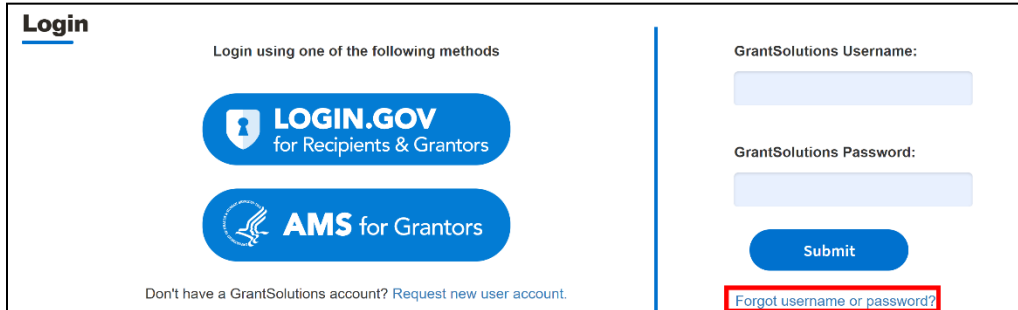
4. Closing ARM and Logging off

1. To c**lose 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.
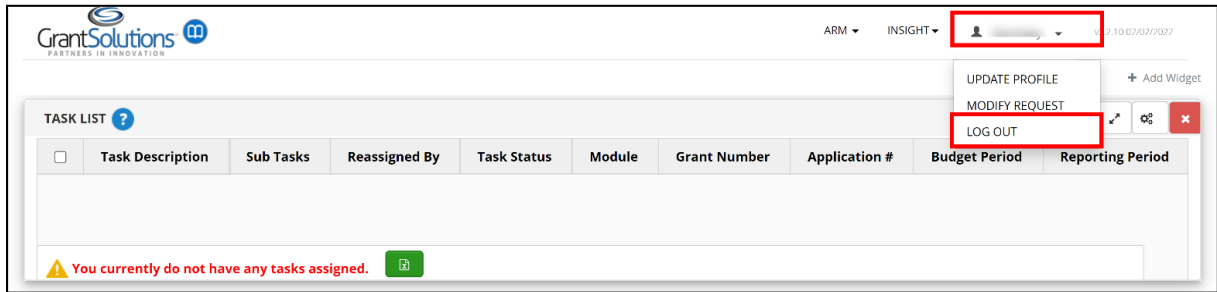
Chapter 2: Starting Your Review

Overview

This section covers accessing the Session Screen your main hub during a review. The session provides different monitoring tools to monitor the progress of the review, panels, and panelists.

1. Accessing your Session

After login into the ARM System, you will reach the Agency Home screen that lists the agency you are serving as Review Director/Panel Manager/Panel Monitor.

1. Click the hyperlinked **Agency Name**.

Abbr	Agency List	Role
ATA	ARM Training Agency	Review Director

2. Click the hyperlinked **Session Name**.

	ID ▣ ▣	Session List for ATA ▣ ▣	Status ▣ ▣	Program ▣ ▣	Program Support Site
1.	FYARMAN	FY21 ARM Manual	In-Review	ATA	--

You will now see the Session Screen.

Session ID:	FYARMAN
Session Name:	FY21 ARM Manual ()
Status:	In-Review
Review Progress:	75.0 % of Applications In Review: 3 / 4; 25.0 % of Applications Approved: 1 / 4;
View Panel Progress:	1 2 3 4
Evaluation List:	By Chair By Reviewer

Reports   Panelists Feedback

2. Understanding the Session Screen

Session ID, Session Name, Review Type, Status Sections

Session ID:	FYARMAN
Session Name:	FY21 ARM Manual ()
Status:	In-Review

1. The **Session ID** is a unique ID that is specific to the session in ARM**.** The format of the **Session ID** depends on the agency and typically consists of the year, abbreviated program name, and/or Opportunity Number.

2. The **Session Name** is the name of your review session. This session name will typically reflect the name of the Program/Announcement and/or Announcement Number.

3. The **Status** is the status of the review session itself and not a status representing panel progress. The status will be either:

   - **In-Review:** This means that a review is still in progress.
   - **Post Review:** This means that a review is now closed.
   - **Complete:** This status also means that a review is now closed.

Review Progress Section

Review Progress:	75.0 % of Applications In Review: 3 / 4; 25.0 % of Applications Accepted: 1 / 4;

The **Review Progress** section is a high-level summary of review progress. It shows the number of applications that are still in the **In-Review** status and the number of applications that have been accepted.

Model 4:

Review Progress:	100.0 % of Applications In Review: 3 / 3; 0.0 % of Applications Accepted: 0 / 3; 0.0 % of Applications Not Recommended: 0 / 3;
Chairperson Progress:	66.67 % of Applications Certification Pending: 2 / 3; 33.33 % of Applications Certification Complete: 1 / 3;

View Panel Progress Section

View Panel Progress:	1	2	3	4

View Panel Progress lists all panels in your review. Each panel number is hyperlinked and clicking the hyperlinks allows you to view the progress of a panel and access the Summary Report.

Note: Review Directors have access to all panels on a reviewer while Panel Managers and Panel Monitors only have access to the panels that they have been assigned.

Evaluation list

Evaluation List contains a hyperlink for each role. Clicking on these hyperlinks allows you to monitor the progress of the panelists by role**.** The roles listed will depend on the ARM Model being used. See Chapter 3: Monitoring the Review Progress.

Chapter 3: Monitoring the Review Progress

Overview

This section covers monitoring the progress of a review, which is key in ensuring adherence to timelines and identifying those panelists who may be falling behind. All **Review Directors**, **Panel Managers,** and **Panel Monitors** can monitor the process of a review **however** please follow the best practices of your program office and guidance provided as you may only be required to review the **Summary Reports**, **Summary of Panel Discussions (SPD)** or **Technical Review Forms (TRF).**

1. Understanding Application Status

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 and has not yet accessed the evaluation. Scoring and commenting has not begun.

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

Withdrawn by Reviewer (Model 7 only): The Reviewer has decided to withdraw their submitted evaluation to make changes to scores and/or comments and has control of the application. The option to withdraw an evaluation is only available while the application is in Submitted to Chair status.

Submitted to Chair (Model 1, 2, 4, 5, 7): All reviewers have completed the evaluations for the application and have submitted them to the Chairperson. The Chairperson has control of the application and can begin creating the Summary Report, and Reviewers cannot make any changes to their individual evaluations.

Returned by Chair (Model 1, 2, 4, 5, 7): The Chairperson has identified changes in the evaluation that need to be addressed by the Reviewer. The Chairperson has returned the application to the Reviewer's control for additional work. A Chairperson will not have visibility to a reviewer's scores while an evaluation is in this status. A Chairperson cannot edit any reviewer's scores.

Submitted to Panel Manager (Model 5 only): All Reviewers have submitted their evaluations to the Chairperson, and the Chairperson has created the Summary Report and submitted it to the PM. The PM has control of the application to provide initial approval. The panel can no longer make changes to individual evaluations or to the Summary Report.

Returned by Panel Manager (Model 5 only): The PM has identified changes in the Summary Report that need 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 PM cannot edit any Reviewer scores, nor make edits to any comments.

Submitted to Review Director (Model 1, 2, 4, 5, 7): All Reviewers have submitted their evaluations to the Chairperson, and the Chairperson has created the Summary Report and submitted it to the RD. The RD has control of the application to provide final approval. The panel can no longer can make changes to individual evaluations or to the Summary Report.

Submitted (Model 8 only): A reviewers has submitted their evaluations to the Review Director, and the Summary Report has updated. The RD has control of the reviewer's evaluation, and the reviewer can no longer make changes to their evaluation.

Submitted to Review Director (Model 8 only): All Reviewers have submitted their evaluations to the Review Director and the Summary Report has been updated to include all reviewer scores and comments. The Review Director now has control of the application and can accept the Summary Report.

Submitted as Ineligible to Review Director (Model 7 only): The panel has identified an application as ineligible for consideration and, after submitting their evaluations to the Chairperson, the Chairperson submitted it to the RD. The RD has control of the application to certify ineligibility.

Returned by Review Director (Model 1, 2, 4, 5, 7): The RD has identified changes in the Summary Report that need 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 RD cannot edit any Reviewer scores, nor make edits to any comments.

Returned as Ineligible by Review Director (Model 7 only): The RD disagrees with the panel's identification of an application as ineligible for consideration. The RD has determined that the application is in fact eligible and has returned it to the Chairperson so that the panel can complete their evaluation of that application.

Submitted to Panel Monitor (Model 6 only): The Reviewer has completed their TRF or the Primary Reviewer has completed their SPD and has submitted it to the Panel Monitor. The Panel Monitor has control of the TRF or SPD to provide final approval. The Reviewer can no longer make changes to the TRF or the Primary Reviewer can no longer make changes to the SPD.

Returned by Panel Monitor (Model 6 only): The Panel Monitor has identified changes in the TRF or SPD that need to be addressed by the Reviewer or Primary Reviewer. The Reviewer or Primary Reviewer now has control of the application for him/her to address. A Panel Monitor cannot edit any Reviewer scores, nor make edits to any comments in either the TRF or SPD.

Accepted: The RD is satisfied with the Summary Report and provides final approval of that application. No further changes are required or permitted. The Approved status signifies the beginning of the closeout process for Reviewers and Chairpersons.

Accepted (Model 6): The Panel Monitor is satisfied with the TRF or SPD and provides final approval of that report. No further changes are required or permitted. The Approved status signifies the beginning of the closeout process for Reviewers and Primary Reviewers.

Approved as Ineligible (Model 7 only): The RD agrees with the panel's identification of an application as ineligible for consideration. The RD has approved that application, any scores submitted by Reviewers will no longer be recorded with the application, and it will receive no further consideration for award. The Approved as Ineligible status also signifies the beginning of the closeout process for Reviewers and Chairpersons.

Not Recommended (Model 4 Only): 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.

Certification Pending (Model 4 Only): 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 (Model 4 Only): This status indicates that the Chair has met with the panel, completed the panel voting process and has Certified the review.

2. Evaluating Progress by Panel

Monitoring review progress by using the panel view enables you to monitor the process of the panel as a whole and includes the individual status and progress of each panel member.

1. From the Session screen, click the hyperlinked **Panel number**.

View Panel Progress: 1 2 3 4

2. You will now see the Panel screen.

Panel Number 1	
Chair	#29378 Christine Newcomer (OH)
Reviewer	#24568 Karl Davis (DC)
	#29377 Cynthia Hansard (MD)

Note: Scores with 'A' are average of the panel's scores.

Application Number	Applications Name	Reviewer	Status	Score
4ARManualP01	Application Name Hyperlink	Christine Newcomer (29378)	Submitted to Review Director	22.00 A
4ARManualP01	Application Name Hyperlink	Karl Davis (24568)	Submitted to Review Director	6.0
4ARManualP01	Application Name Hyperlink	Cynthia Hansard (29377)	Submitted to Review Director	38.0
4ARManualP02	Application Name Hyperlink	Christine Newcomer (29378)	Submitted to Review Director	28.50 A
4ARManualP02	Application Name Hyperlink	Karl Davis (24568)	Submitted to Review Director	48.0
4ARManualP02	Application Name Hyperlink	Cynthia Hansard (29377)	Submitted to Review Director	9.0

Understanding the Panel Screen

The **Panel Screen** displays the panelists and applications assigned to the panel. For each application on the panel:

- The grey rows represent the **Chair/Notetaker/SSO/Primary Reviewer**. The displayed status represents the **Chair/Notetaker/SSO/Primary** Reviewer's status in compiling the **Summary Report**, **Technical Review Forms (TRF),** or **Summary of Panel Discussion (SPD).** It also lists the average score for that application.

- The white rows represent the reviewers. The displayed status represents their progress in evaluating the application, and the score represents their total score for that application.

- The application number and name in the grey rows are active hyperlinks.

3. Evaluating Progress by Reviewer (All ARM Models)

This view allows you to monitor the **reviewer's** adherence to review timelines and identify those Reviewers who may be falling behind schedule.

1. On the Session screen, click the **by Reviewer** hyperlink.

Evaluation List: By Chair By Reviewer

2. You will then reach the Reviewer Evaluation List Screen.

Page: 1
Page Size: 50 Change

Application Number	Applications	Reviewer	Status	Score	Panel
4ARManualP01	Application Name Hyperlink	C.Hansard (29377)	Submitted to Review Director	38.0	1
4ARManualP01	Application Name Hyperlink	K.Davis (24568)	Submitted to Review Director	6.0	1
4ARManualP02	Application Name Hyperlink	C.Hansard (29377)	Submitted to Review Director	9.0	1
4ARManualP02	Application Name Hyperlink	K.Davis (24568)	Submitted to Review Director	48.0	1
4ARManualP03	Application Name Hyperlink	O.Carter (24567)	Pre-review	--	2
4ARManualP03	Application Name Hyperlink	S.Dutch (24569)	Submitted to Chair	9.0	2
4ARManualP04	Application Name Hyperlink	S.Dutch (24569)	In-review	--	2
4ARManualP04	Application Name Hyperlink	O.Carter (24567)	Pre-review	--	2

Page: 1
Page Size: 50 Change

Understanding the Reviewer Evaluation Screen

The **Reviewer Evaluation List Screen** displays all applications assigned to a session and will show the progress made by the reviewers for each application they are assigned to review. On this screen:

*   The applications are listed by application number.

*   The arrow next to the header allows you to sort the list by either **application number**, **application name**, **reviewer**, **status** (See Section 1. Understanding Application Status for more information)**,** or **panel**.

*   The **Application Status** in the status columns indicates the progress made by the reviewer in completing their Evaluation. The status is an active hyperlink, which you can click to access the return history.

*   Each application name is hyperlinked allowing you to access the **Summary Report** or **Technical Review Form (TRF)** by clicking on the hyperlinked application name.

4. Evaluating Progress by Chairperson/Notetaker/SSO

This view also allows you to monitor the **Chairperson/Notetaker/SSO's** adherence to review timelines and identify those Chairs who may be falling behind schedule.

1. On the Session screen, click the **by Chair**, **by Notetaker, or by SSO** hyperlink.

2. You will then reach the **Chair/Notetaker/SSO** Evaluation List Screen

Understanding the Chair/Notetaker/SSO Evaluation Screen

The **Chair Evaluation List Screen** displays all applications assigned to a session and shows the progress made by the **Chair/Notetaker/SSO** in creating the Summary Report. On this screen:

- Applications are listed by application number.

- The arrow next to the header allows you to sort the list by either **application number**, **application name**, **reviewer**, **status** (See Section 1. Understanding Application Status for more information)**,** or **panel**.

- The **Application Status** in the status columns indicates the progress made by the Chair/Notetaker/SSO in completing the Summary Report. The status is an active hyperlink, which you can click to access the return history.

- Each application name is hyperlinked allowing you to access the **Summary Report** by clicking on the hyperlinked application name.

- For each application, the last column on the right will have an **Open File** hyperlink, which allows you to download and view the application file.

4.1 Accessing the Application file

The application file can only be accessed from the **By Chair**, **By Notetaker** or **By SSO page.** For each application, the last column on the right will have an **Open File** hyperlink, which allows you to download and view the application file.

5. Evaluating Progress by Chairperson (Model 4 only)

This view also allows you to monitor the Chairperson's adherence to review timelines and identify the Chairpersons who may be falling behind schedule.

1. On the Session screen, click the **by Chairperson** hyperlink.

Evaluation List:	By SSO	By Reviewer	By Chairperson

2. You will then reach the **Chairpersons Evaluation List Screen.**

Page: 1   Total Applications :
Page Size: 50   Change

Application Number ◨ ◨	Applications ◨ ◨	Chairperson ◨ ◨	Status ◨ ◨	Panel ◨ ◨
FY22MODEL4001	Texas	S. Horati (1998)	Certification Pending	1
FY22MODEL4002	Texas	S. Horati (1998)	**Certification Complete**	1
FY22MODEL4003	Texas	S. Horati (1998)	Certification Pending	1

Page: 1
Page Size: 50   Change

Understanding the Chairperson's Evaluation Screen

The **Chairperson's Evaluation List Screen** displays all applications assigned to a session and shows the progress made by the Chairperson in the Application Certification Process. On this screen:

- Applications are listed by application number.

- The arrow next to the header allows you to sort the list by either **application number**, **application name**, **Chairperson**, **status** (See Section 1. Understanding Application Status for more information)**, or **panel**.

- In each row, you can view the status of each application, the chairperson's name, and the panel to which the application is assigned.

6. Evaluation Progress by Panel Manager (Model 5 only)

This view also allows you to monitor the Panel Mangers adherence to review timelines and identify those panel Managers who may be falling behind schedule.

1. On the Session screen, click the **by Panel Manager** hyperlink.

Evaluation List:	By Panel Manager	By Chair	By Reviewer

2. You will then reach the **Panel Managers Evaluation List Screen.**

	Page: 1				
	Page Size: 50 [Change]				
Application Number	Applications	Panel Manager	Status	Score	Panel
ARMVID50001	Alaska	S.Morsel (35267)	Approved	21.00	1
ARMVID50002	Alabama	S.Morsel (35267)	Returned by Panel Manager	17.50	1
ARMVID50003	Texas	S.Morsel (35267)	Submitted to Chair	18.00	1
ARMVID50004	Maryland	S.Morsel (35267)	Submitted to Panel Manager	16.00	1
ARMVID50011	Washington	S.Morsel (35267)	Returned by Chair	--	1
	Page: 1				
	Page Size: 50 [Change]				

Understanding the Panel Manager's Evaluation Screen

The **Panel Manager's Evaluation List Screen** displays all applications assigned to a session and shows the progress made by the Panel Manager in reviewing the Summary Report submitted by the Chair. On this screen:

- The applications are listed by application number.
- The arrow next to the header allows you to sort the list by either **application number**, **application name**, **reviewer**, **status** (See Section 1. Understanding Application Status for more information)**,** or **panel**.
- Each application name is hyperlinked allowing you to access the **Summary Report.**

7. Evaluating Progress by Primary Reviewer (Model 6 only)

This view also allows you to monitor the Primary Reviewer's adherence to review timelines and identify those Primary Reviewers who may be falling behind schedule.

1. On the Session screen, click the **by Primary Reviewer** hyperlink.

Evaluation List: By Primary Reviewer   By Reviewer

2. You will then reach the **Primary Reviewers Evaluation List Screen**

	Page: 1		
	Page Size: 50 [Change]		
Application Number	Applications	Status	Panel
M6RH1	Application Name Hyperlink	Approved	1
M6RH2	Application Name Hyperlink	Returned by Panel Monitor	1
M6RH3	Application Name Hyperlink	Approved	1
M6RH4	Application Name Hyperlink	Returned by Panel Monitor	1
	Page: 1		
	Page Size: 50 [Change]		

Understanding the Primary Reviewer's Evaluation Screen

The **Panel Manager's Evaluation List Screen** displays all applications assigned to a session and shows the progress made by the Primary Reviewer in completing the **Summary of Panel Discussion (SPD)**. On this screen:

- The applications are listed by application number.

- The arrow next to the header allows you to sort the list by either **application number**, **application name**, status**,** or **panel**.

- The **Application Status** in the status columns indicates the progress made by the Primary Reviewer. The status is an active hyperlink, which you can click to access the return history. (See Section 1. Understanding Application Status for more information)

- Each application name is hyperlinked allowing you to access the **Summary of Panel Discussion (SPD) and Technical Review Form (TRF)** by clicking on the hyperlinked application name.

- For each application, the last column on the right will have an **Open File** hyperlink, which allows you to download and view the application file.

7.1 Accessing the Application file

For each application, the last column on the right will have an **Open File** hyperlink, which allows you to download and view the application file

8. Evaluating Progress by Application (Model 8 only)

This view also allows you to monitor the adherence to review timelines by application.

1. On the Session screen, click the **by Application** hyperlink.

Evaluation List: By Application   By Reviewer

2. You will then reach the **Application List Screen**

		Page: 1		
		Page Size: 50 Change		
Application Number	**Applications**	**Status**	**Panel**	**View App File**
MODEL8SESSION	Application Name	Submitted to Review Director	1	**Open File**
MODEL8SESSION1	Application Name	Pre-review	1	**Open File**
MODEL8SESSION2	Application Name	Pre-review	1	**Open File**
		Page: 1		
		Page Size: 50 Change		

Understanding the Application List Screen

The **By Application** list screen displays all applications assigned to a session and shows the progress made by the Application. On this screen:

- The applications are listed by application number.

- The arrow next to the header allows you to sort the list by either **application number**, **application name**, status**,** or **panel**.

- The **Application Status** in the status columns indicates the progress made by the Primary Reviewer. The status is an active hyperlink, which you can click to access the return history. (See Section 1. Understanding Application Status for more information)

- Each Status is hyperlinked allowing you to access the Return/Recall History.

- For each application, the last column on the right will have an **Open File** hyperlink, which allows you to download and view the application file.

8.1   Accessing the Application file

For each application, the last column on the right will have an **Open File** hyperlink, which allows you to download and view the application file.

Page: 1

Page Size: [50] [Change]

Application Number ▲ ▼	Applications ▲ ▼	Status ▲ ▼	Panel ▲ ▼	View App File
MODEL8SESSION	Application Name	Submitted to Review Director	1	**Open File**
MODEL8SESSION1	Application Name	Pre-review	1	**Open File**
MODEL8SESSION2	Application Name	Pre-review	1	**Open File**

Page: 1

Page Size: [50] [Change]

Chapter 4: Reviewing Individual Applications

Overview

This section covers accessing the application page where you can view the process made by your panelist for a specific application. For **Panel Managers** and **Review Directors,** you can access the Summary Report, view raw comments, access individual reviewer scores, and access the return history. For **Panel Monito**rs, you can access the **Summary of Panel Discussion (SPD),** the **Technical Review Forms (TRF),** individual reviewer scores, and the return history.

1. Accessing Individual Applications

1. On the Session Page, click on the **Panel Number hyperlink** you wish to access.

View Panel Progress:	1	2	3	4

2. Click the hyperlinked **application number** or **application name**. Note: The screenshot below is from Model 1 but the process for other models is the same.

Panel Number 1				
Chair	#29378 Christine Newcomer (OH)			
Reviewer	#24568 Karl Davis (DC) #29377 Cynthia Hansard (MD)			

Note: Scores with 'A' are average of the panel's scores.

Application Number	Applications Name	Reviewer	Status	Score
4ARManualP01	Application Name Hyperlink	Christine Newcomer (29378)	Submitted to Review Director	22.00 A
4ARManualP01	Application Name Hyperlink	Karl Davis (24568)	Submitted to Review Director	6.0
4ARManualP01	Application Name Hyperlink	Cynthia Hansard (29377)	Submitted to Review Director	38.0
4ARManualP02	Application Name Hyperlink	Christine Newcomer (29378)	Submitted to Review Director	28.50 A
4ARManualP02	Application Name Hyperlink	Karl Davis (24568)	Submitted to Review Director	48.0
4ARManualP02	Application Name Hyperlink	Cynthia Hansard (29377)	Submitted to Review Director	9.0

3. You will now see the Application screen.

Applications Information	
ID:	M5Training003
Name:	Alabama
Address:	FN
Panel:	1

Reviewer ID	Reviewer Name	Evaluation Status	Score
24568	Karl Davis	Submitted to Review Director	33.00[A]
24568	Karl Davis	Submitted to Review Director	33.0
29378	Christine Newcomer	Submitted to Review Director	33.0

Accept   Return   Recall Evaluation   View Report   View Raw Comments

2. Viewing the Summary Report (Panel Managers/Review Directors)

The Summary Report is created by the **Chair/Notetaker/SSO**. During the review, you can access the FSR to monitor the progress made by the **Chair/Notetaker/SSO** in creating the Report. Please note that the FSR is not finalized until the application is in a **Submitted to Review Director** or **Submitted to Panel Manager** status.

1. On the application screen, click the **View Report** button.

Accept   Return   Recall Evaluation   **View Report**   View Raw Comments

2. he **PDF Summary Report** will open in a new tab or window.

Summary Report without Sub criterion.

4ARManualP01 Application Name Hyperlink

ARM Training Agency
FY22 ARM Manual
FINAL SUMMARY OF CRITERION SCORES

Application Number: 4ARManualP01   Panel: 1
Application Name: Application Name Hyperlink
State: FN   City: .

Criteria	Max	T.Calif	O.Carte	K.Davis
1. Objectives and Need for Assistance	20	4	5	7
2. Approach	50	3	6	5
3. Evaluation	20	2	4	4
4. Organizational Capacity	10	2	2	6
Total:	100	11.0	17.0	22.0
Average:		16.67		

Summary Report Sub Criterion.

<table>
<tr><td colspan="5" align="center">SUMMARY OF CRITERION SCORES</td></tr>
<tr><td>Application Number:</td><td colspan="2"></td><td>Panel:</td><td></td></tr>
<tr><td>Application Name:</td><td colspan="4">Application Name</td></tr>
<tr><td>State:</td><td colspan="2">FN</td><td>City:</td><td>.</td></tr>
</table>

Criteria	Max	T.Calif	O.Carte	K.Davis
1. Consecutive Criteria	10	--	--	--
1.1. Sub-Criteria A	5	--	--	--
1.1.1. Sub-Criteria A1	2	--	--	--
1.2. Sub-Criteria B	5	--	--	--
2. Budget and Budget Justification	90	--	--	--
Total:	97	--	--	--
Average:			--	

3. Under the reviewer Scores table, the **Summary Report** lists the comments added to the Summary Report by criterion and then by category.

4ARManualP01 Application Name Hyperlink	
Criteria	**Page**
1. Objectives and Need for Assistance	
Strength	
Lorem ipsum dolor sit amet, consectetur adipiscing elit suscipit auctor, quisque orci placerat. Ut duis accumsan potenti vel cras, eget dapibus placerat semper suscipit tempus, integer porta at volutpat. Donec imperdiet eros natoque posuere vulputate ridiculus egestas cras, curabitur nec porttitor vel laoreet nostra primis faucibus, velit tristique scelerisque praesent proin viverra pretium.	4
Lorem ipsum dolor sit amet consectetur adipiscing, elit netus pellentesque dictum eros proin sem, turpis lacinia duis ad iaculis. Proin netus nulla libero imperdiet litora ultrices conubia, dictumst purus accumsan arcu laoreet pharetra lectus condimentum, sed nascetur malesuada nibh potenti id. Ultricies eget velit vulputate sollicitudin tortor phasellus vitae praesent volutpat gravida auctor, potenti bibendum scelerisque quam aptent libero pharetra aliquam augue commodo.	Category 1
Weakness	
None	

4. If you see the word **None** for any comment category, it means that no comments were added to the Summary Report for that category for that criterion.

Understanding the Summary Report

The Summary Report first lists the detailed scores, by criterion, and total score for each Reviewer as well as the overall average score for the application. The score page is followed by the Reviewer comments that have been included in the report by the Chairperson. Comments are anonymized and listed by criterion and then by category. **Note**: If no comments were added to any comment category for any criterion, you will see the word "**None**." This does not mean that there were no strengths or weaknesses for a particular criterion, but that there are no comments.

3. Viewing Individual Reviewer Scores

From the Application screen, you can view the scores entered by a reviewer for each scoring criteria. During a review, you can monitor their progress in entering scores into the system even if the application is still the In-Review Status. Please note that their scores are not finalized until the application is in a **Submitted to Review Director** or **Submitted to Panel Manager** status.

1. Click any hyperlinked **Reviewer** name.

Reviewer ID	Reviewer Name	Evaluation Status	Score
29378	Christine Newcomer	Submitted to Review Director	22.00^A
24568	Karl Davis	Submitted to Review Director	6.0
29377	Cynthia Hansard	Submitted to Review Director	38.0

2. The scores will open in a new tab or window.

Applications: 4ARManualP01 Application Name Hyperlink	
	Score with * is incomplete.
Criteria	**Score**
1 Objectives and Need for Assistance (20 points)	2
2 Approach (50 points)	2
3 Evaluation (20 points)	1
4 Organizational Capacity (10 points)	1
Actual Score:	**6**

Understanding the Individual Reviewer Score Screen

You will see the application number and name at the top along with **Evaluated by [Reviewer name]**. Beneath this, you will see the full list of review criteria with the individual score awarded to each.

4. Viewing Raw Reviewer Comments (Panel Managers/Review Directors)

You have the option to view all raw Reviewer comments. These comments represent every comment that the Reviewers submitted to the Chairperson, whether they were included by the Chairperson in the Summary Report or not. These comments will not reflect any editing done by the Chairperson or any new comments added by the Chairperson (all of these will be visible in the Summary Report).

1. Click the **View Raw Comments** button.

Accept	Return	Recall Evaluation	View Report	View Raw Comments

2. The comments will open in a new tab or window.

3. You will now see the complete list of all Reviewer comments for all review criteria. **Note**: If no comments are displayed below a Reviewer's name, the Reviewer has not submitted any comments for that criterion.

5. Viewing the Return/Recall History (Panel Managers/Review Directors)

You can view the Return/Recall history by clicking on the status of the application. Return/Recall Comments can be viewed by Review Directors, Panel Managers, and panelists. **Note:** The application does not need to be in a returned status for you to access this screen and click on the status from any of the different views.

1. Click on the hyperlinked **application status**.

Reviewer ID	Reviewer Name	Evaluation Status	Score
29378	Christine Newcomer	Returned by Review Director	28.50^A
24568	Karl Davis	Returned by Review Director	48.0
29377	Cynthia Hansard	Returned by Review Director	9.0

2. A new tab will open, and you will now see the return history.

Dec 5, 2022: Returned By Review Director #19992 to #19992
General Return Comment
The Review Director Feedback can be found here
1.1-Evaluation
The Review Director Feedback can be found here
Dec 1, 2022: Recalled By Chair #19992 From #19992
General Return Comment
Recall History Justification

Understanding the Recall/Return History Screen

When an application is returned or recalled, the return history will display when the application was returned, who returned the application, and to whom the application was returned. **Note**: You will need to use the Reviewer ID numbers to determine who returned the applications and to whom they were returned.

6. Viewing the Return History of the TRF and SPDs (Panel Monitor)

You can view the Return history by clicking on the status of the application. Return Comments can be viewed by Panel Monitors, by Primary Reviewers, and by reviewers. panelists. **Note:** The application does not need to be in returned status for you to access this screen.

Important: You can only access the return history from the **by Primary Reviewer** screen and it will include the **Summary of Panel Discussion (SPD)** and **Technical Review Form (TRF)** return history on screen.

1. Click on the **by Primary Reviewer** hyperlink.

Evaluation List:	By Primary Reviewer	By Reviewer

2. Click on the **status** of the application.

	Page: 1 Page Size: 50 [Change]		
Application Number 🔼🔽	**Applications** 🔼🔽	**Status** 🔼🔽	**Panel** 🔼🔽
M6RH1	Application Name Hyperlink	Approved	1
M6RH2	Application Name Hyperlink	Returned by Panel Monitor	1
M6RH3	Application Name Hyperlink	Approved	1
M6RH4	Application Name Hyperlink	Returned by Panel Monitor	1
	Page: 1 Page Size: 50 [Change]		

A new tab will open, and you will now see the return history.

Mar 7, 2022 03:03:55 PM: SPD - Rejected By Panel Monitor #19992 to #19992
Strengths
Return Comments for Strengths
Weaknesses
Return Comments for Weakness
General
Return Comments for General Feeback
Mar 7, 2022 03:04:33 PM: TRF - Rejected By Panel Monitor #19992 to #24569
1-Leverage Percentile
These are Return comments

Chapter 5: Panel Manager Role (Model 5)

Overview

The primary function of the Panel Manager is to provide an initial review of the Summary Report. This section covers reviewing the Summary Report, returning the report to the Chair if changes are required, and submitting the report to the Review Director for their final review and approval.

> **Note:** As Panel Managers, you may also have monitoring responsibilities, which are covered in Chapter 3: Monitoring the Review Progress.

1. Reviewing the Summary Report

Only once the application is in a **Submitted to Panel Manager** status are you able to review the Summary Report. As the Panel Manager, you will receive email notifications from ARM as the **Chair** submit the Summary Report.

As a reminder to access the Summary Report, you will need to:

1. Click the **Panel Number** the application is assigned to.

2. Click the hyperlinked **Application Name** or **Application Number**.

3. Click the **Report** button to view the Summary Report.

Please refer to Chapter 4: Reviewing Individual Applications for more information on how to access the Summary Report and the tools available on the application page.

When reviewing the Summary Report, you must follow any guidance received by the Program team and must follow the best practices of your program office and agency.

If you review the Summary Report and you identify changes and edits, you must reject the application, sending it back to the Reviewer for revisions.

If you review the Summary Report and you are satisfied with it, you will be ready to provide the final approval of the application.

2. Returning the Summary Report

To reject an application, follow the steps below:

1. Navigate to the application page. (See Chapter 4: Reviewing Individual Applications for more information)

2. The **Return** button**. Note:** These buttons will only be active if the application is the **Submitted to Panel Manager** or **Returned by Review Director** Status.

Reviewer ID	Reviewer Name	Evaluation Status	Score
29378	Christine Newcomer	Submitted to Panel Manager	22.00^A
24568	Karl Davis	Submitted to Panel Manager	6.0
29377	Cynthia Hansard	Submitted to Panel Manager	38.0

Submit to Review Director   Return   Recall Evaluation   View Report   View Raw Comments

3. Enter your feedback in the appropriate criteria or general textboxes. You may enter individual return comments for each criterion, but only one return comment in one textbox is required.

At Least One Return Comment is Required and Each Return Comment is Limited to 4000 Characters.

1-Objectives and Need for Assistance

These are Return Comments

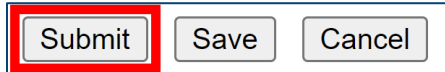Characters: 22/4000

2-Approach

Characters: 0/4000

General Return Comment

Characters: 0/4000

At Least One Return Comment is Required and Each Return Comment is Limited to 4000 Characters.

Submit   Save   Cancel

4. Scroll to the bottom of the screen; click the **Submit** button to return the evaluation to the reviewer. The **Save** button allows you to reset the 30-minute timer and allows you to save the progress made so far if you need to return to the application page or entering comments as you are reviewing the FSR. The **Cancel** button allows you to return to the application screen without returning the evaluation.

5. The status of that application will change to **Returned by Panel Manager.**

The Chairperson will now have control of the Summary Report and can either make the changes themselves or return evaluations to the Reviewers. Once all requested updates have been made, they will re-submit the application.

3. Recalling a Summary Report

The **Recall Evaluation** button is a feature in ARM that allows you to **Recall** a returned Summary Report from the Chairperson. The Recall button only becomes available once the application is in the **Returned by Panel Manager** status.

Reviewer ID	Reviewer Name	Evaluation Status	Score
29378	Christine Newcomer	Returned by Panel Manager	22.00^A
24568	Karl Davis	Returned by Panel Manager	6.0
29377	Cynthia Hansard	Returned by Panel Manager	38.0

Submit to Review Director   Return   Recall Evaluation   View Report   View Raw Comments

To recall an evaluation:

1. Click the **Recall Evaluation** button.
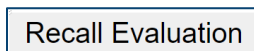
Recall Evaluation

2. Enter your feedback in the appropriate criteria or general textbox. **Note**: Only one recall comment is required to return evaluations.

1-Objectives and Need for Assistance

This is a return comment.

Characters: 21/4000

2-Approach

3. Click the **Submit** button to recall the Summary Report from the Reviewers. **Note:** You do not need to click the save button before returning the evaluation. The **Save** button allows you to save the feedback as you enter it to avoid loss of comments if a timeout or if you need to return to the Evaluation Screen.

At Least One Comment is Required and Each Comment is Limited to 4000 Characters
Submit   Save   Cancel

Once an evaluation has been returned to the Status of the Application will revert to the **Submitted to Panel Manager** status and the return history screen will be updated to include your recall comments.

4. Submitting to the Review Director

To submit the **Summary Report** to the Reviewer Director, follow the steps below:

1. Navigate to the application page. (See Chapter 4: Reviewing Individual Applications for more information)

2. Click the **Submit to Review Director** button.

Reviewer ID	Reviewer Name	Evaluation Status	Score
29378	Christine Newcomer	Submitted to Panel Manager	22.00[A]
24568	Karl Davis	Submitted to Panel Manager	6.0
29377	Cynthia Hansard	Submitted to Panel Manager	38.0

Submit to Review Director   Return   Recall Evaluation   View Report   View Raw Comments

3. Click the **OK** button in the confirmation box.

arm.grantsolutions.gov says

Please confirm submitting the evaluation to Review Director.

OK   Cancel

4. The status of that application will change to **Submitted to Review Director**.

Reviewer ID	Reviewer Name	Evaluation Status	Score
29378	Christine Newcomer	Submitted to Review Director	22.00[A]
24568	Karl Davis	Submitted to Review Director	6.0
29377	Cynthia Hansard	Submitted to Review Director	38.0

Once the Review Director receives the Summary Report, they will in turn review the report. There are two outcomes of their review:

1. If the Review Director is satisfied with the Summary Report, they will accept that report.

2. If the Review Director identifies changes that are needed to submit the Summary Report, they will return it to you with suggested edits.

5. Returned by Review Director

When the Review Director returns the Summary Report, the status of that application will change from the **Submitted to Review Director** Status to a **Returned by Review Director** Status. **Note**: If notifications are turned on, you will receive an email from no_reply@grantsolutions.gov that an evaluation has been returned.

Reviewer ID	Reviewer Name	Evaluation Status	Score
29378	Christine Newcomer	Returned by Review Director	28.50[A]
24568	Karl Davis	Returned by Review Director	48.0
29377	Cynthia Hansard	Returned by Review Director	9.0

The Review Director will provide return feedback, which can be viewed by clicking the status of the application. You use this feedback as the basis for your return comments (See Chapter 4: Reviewing Individual Applications for more information.).

You will then need to complete the process by returning the applications to the chair following the steps above. Once the Chair has made all necessary modifications, they will resubmit the Summary Report for your review.

IMPORTANT: You must submit all applications assigned to the Review Director. A review is only finished once all applications are accepted by the Review Director.

Chapter 6: Review Director Role (Model 1, 2, 4, 5, 7)

Overview

The primary function of the Review Director is to provide final approval for all application evaluations in ARM, certifying the review is complete. This section covers how to return the Summary Report to the **Chair/Notetaker/SSO** for potential changes and covers approving the Summary Report.

Important: The approval process is key to finalizing remote reviews. Please follow the best practices of your program office and agency concerning when to accept applications. All Applications must be accepted for the session to be closed.

Note: As Review Directors, you may also have monitoring responsibilities, which are covered in Chapter 3: Monitoring the Review Process.

1. Reviewing the Summary Report

Only once the application is in a **Submitted to Review Director** Status are you able to review the finalized Summary Report.

Reviewer ID	Reviewer Name	Evaluation Status	Score
24568	Karl Davis	Submitted to Review Director	33.00^A
24568	Karl Davis	Submitted to Review Director	33.0
29378	Christine Newcomer	Submitted to Review Director	33.0

Accept   Return   Recall Evaluation   View Report   View Raw Comments

As the Review Director, you will receive email notifications from ARM as the **Chair/Notetaker/SSOs** or **Panel Managers** submit the Summary Report. **Note:** As Review Directors, you have access to all panels and will receive notification for all applications on your review.

As a reminder to access the Summary Report, you will need to:

1. Click the **Panel Number** the application is assigned to.
2. Click the hyperlinked **Application Name** or **Application Number**.
3. Click the **Report** button to view the Summary Report.

Please refer to Chapter 4: Reviewing Individual Applications for more information on how to access the Summary Report and the tools available on the application page.

When reviewing the Summary Report, you must follow any guidance received by the Program team and must follow the best practices of your program office and agency.

If you review the Summary Report and you identify changes and edits, you must reject the application, sending it back to the Chair/Notetaker/SSO or Panel Manager.

If you review the Summary Report and you are satisfied with the report, you will be ready to provide the final approval of the application.

Model 4 Application Page

In addition to accessing the Summary Report From the application screen, you will also view the Application Budget Data, The Panel Recommendations, Preference Questions, Priority Points Questions, and the application Voting Process.

Application Budget Data	
Amount for Budget Year 1	--
Amount for Budget Year 2	--
Amount for Budget Year 3	--
Amount for Budget Year 4	--
Budget Total	**$0**
Budget Recommendation	**--**

Panel Recommendation(s)	
Total Current Recommendations	0

Preference Question(s)	Preference Met
This is a preference Question	--

Priority Points Question(s)	Option	Priority Point
This is a Priority Question	--	--

Application Voting Process		
The voting decision: Not Recommended	Approvals: 5	Disapprovals: 6

2. Returning the Summary Report

Depending on the Model of ARM used for your review, as the Review Director you will either need to return the Summary Report to the Chairperson/Notetaker/SSO or to the Panel Manager.

1. Navigate to the application page. (See Chapter 4: Reviewing Individual Applications for more information)

2. Click the **Return** button or the **Return to Panel Manager** Button. **Note:** This button will only be active if the application is in **Submitted to Review Director** Status.

Returning to the Chairperson/Notetaker/SSO:

Reviewer ID	Reviewer Name	Evaluation Status	Score
24568	Karl Davis	Submitted to Review Director	33.00[A]
24568	Karl Davis	Submitted to Review Director	33.0
29378	Christine Newcomer	Submitted to Review Director	33.0

Accept | Return | Recall Evaluation | View Report | View Raw Comments

Returning to the Panel Manager:

Reviewer ID	Reviewer Name	Evaluation Status	Score
24568	Karl Davis	Submitted to Review Director	33.00[A]
24568	Karl Davis	Submitted to Review Director	33.0
29378	Christine Newcomer	Submitted to Review Director	33.0

Accept | Return to Panel Manager | Recall Evaluation | View Report | View Raw Comments

3. Enter your feedback in the appropriate criteria or general textboxes. You may enter individual return comments for each criterion, but only one return comment in one textbox is required. You can also format your return comments.

At Least One Return Comment is Required and Each Return Comment is Limited to 4000 Characters.

1-Objectives and Need for Assistance

These are Return Comments

Characters: 22/4000

2-Approach

Characters: 0/4000

General Return Comment

Characters: 0/4000

At Least One Return Comment is Required and Each Return Comment is Limited to 4000 Characters.

Submit   Save   Cancel

4. Scroll to the bottom of the screen; click the **Submit** button to return the evaluation to the reviewer. The **Save** button allows you to reset the 30-minute timer and allows you to save the progress made so far if you need to return to the application page or entering comments as you are reviewing the FSR. The **Cancel** button allows you to return to the application screen without returning the evaluation.

Submit   Save   Cancel

5. The status of that application will change to **Returned by Review Director.**

Reviewer ID	Reviewer Name	Evaluation Status	Score
29378	Christine Newcomer	Returned by Review Director	28.50[A]
24568	Karl Davis	Returned by Review Director	48.0
29377	Cynthia Hansard	Returned by Review Director	9.0

Note: If your review includes **Panel Managers**, you are unable to return the Summary Report directly to the chair and will need to return the FSR to the Panel Manager.

The **Chairperson/Notetaker/SSO** will now have control of the Summary Report and can either make the changes themselves or return evaluations to the Reviewers.

Once the Summary Report has been updated, the **Chair/Notetaker/SSO** will need to re-submit the Summary Report.

3. Recalling a Summary Report (Model 1 and 5)

The **Recall Evaluation** button is a feature in ARM that allows you to **Recall** a returned Summary Report from the **Chairperson** or **Panel Manager.** The Recall button only becomes available once the application is in the **Returned by Review Director** status.

Reviewer ID	Reviewer Name	Evaluation Status	Score
29378	Christine Newcomer	Returned by Panel Manager	22.00[A]
24568	Karl Davis	Returned by Panel Manager	6.0
29377	Cynthia Hansard	Returned by Panel Manager	38.0

Submit to Review Director | Return | Recall Evaluation | View Report | View Raw Comments

To recall an evaluation:

4. Click the **Recall Evaluation** button.

   Recall Evaluation

5. Enter your feedback in the appropriate criteria or general textbox. **Note**: Only one recall comment is required to recall the Summary Report.

1-Objectives and Need for Assistance

This is a return comment.

Characters: 21/4000

2-Approach

6. Click the **Submit** button to recall the Summary Report from the Reviewers. **Note:** You do not need to click the save button before returning the evaluation. The **Save** button allows you to save the feedback as you enter it to avoid loss of comments if a timeout or if you need to return to the Evaluation Screen.

Once an evaluation has been returned to the Status of the Application will revert to the **Submitted to Review Director status** and the return history screen will be updated to include your recall comments.

4. Accepting the Summary Report

When you are satisfied with the Summary Reports, you are then ready to accept the report.

Important: Before accepting an application, please make sure that report is accurate and include reviewer comments as the comments and scores can be provided to the applicant as feedback on their applications. If comments are not included on the FSR, the report is pulled by the Session Admin will be blank for the application in question.

1. Navigate to the application page. (See Chapter 4: Reviewing Individual Applications for more information)

2. Click the **Accept** button. **Note:** This button will only be active if the application is in the **Submitted to Review Director** Status.

3. The status of that application will change to **Accepted**.

This now certifies that the review of that application is complete and satisfactory.

If you accept an application in error and determine further changes are necessary, contact your Session Administrator (SA) to have them return the application to you.

IMPORTANT: You must Accept all applications assigned to finalize the review.

Chapter 7: Panel Monitor Role (Model 6)

Overview

This section covers the Panel Monitor role and includes how to access the **Technical Review Form (Technical Review Form (TRF)**, how to access the **Summary of Panel Discussion (SPD), and how to return the TRF/SPD.** The section also covers the final steps in the review process, which is approving the **Summary of Panel Discussion (SPD)** and **Technical Review Form (TRF).**

Final approval of the TRFs and SPD is the most important step in completing the review session and is especially KEY to finalizing remote reviews. Please follow the best practices of your program office and agency concerning when to accept applications.

1. Reviewing the Technical Review Form

To view/review the Summary of Panel Discussion (SPD) created by the reviewer, follow the steps below:

1. Navigate to the application page. (See Chapter 4: Reviewing Individual Applications for more information)

2. Click the **View TRF** hyperlink. **Note:** If the evaluation status is in either the **In-Review** Status or **Pre-Review** Status, the **View TRF** hyperlink will be inactive.

Reviewer ID	Reviewer Name	Evaluation Status	View TRF	Score
19992	Christine Newcomer	Submitted to Panel Monitor		--^A
24567	Octavia Carter	Submitted to Panel Monitor	View TRF	11.0
24569	Shena Dutch	Submitted to Panel Monitor	View TRF	2.0

| Accept Panel Summary | Return Panel Summary | View Summary of Panel Discussion | View PDF Report |

3. The **Technical Review Form (TRF)** will open in a new tab or window.

4. Review the scores and comments. The **TRF** first lists the detailed scores, by criterion, and total score. The score table is followed by the Reviewer's comments. Comments are anonymized and listed by criterion, with Strength comments followed by Weakness comments and then followed by General Comments. **Note**: If no comments were added to the TRF for any comment category for any criterion, you will see the word "**None**." This does not mean that there were no strengths or weaknesses for a particular criterion, but that there are no comments.

ARM Training Agency

Technical Review Form

| Application Number: | M6RH2 | Panel: | 1 | **Score:** | 11.0 |

Applications: Minnie

City: Washington   State: DC

CRITERIA	Scores
1 Leverage Percentile (15 points)	11
Actual Score:	11 / 15

Rationale

SCORING CRITERIA	Page

1 Leverage Percentile (15 points)

General

Lorem ipsum dolor sit amet consectetur adipiscing elit mi congue egestas fermentum erat semper blandit rutrum sociis gravida, leo est porttitor sollicitudin auctor conubia nisl natoque dui elementum quam justo primis habitant tortor. Magnis duis ac facilisis nostra massa aliquam lacinia justo, primis placerat sed per nascetur volutpat curabitur, penatibus odio vestibulum orci faucibus ut sagittis. Dignissim montes feugiat maecenas vel suscipit, rutrum eros cras quis dis ornare, lobortis vulputate odio porta.   Category 1

Strength

None

Weakness

Lorem ipsum dolor sit amet consectetur adipiscing elit mi congue egestas fermentum erat semper blandit rutrum sociis gravida, leo est porttitor sollicitudin auctor conubia nisl natoque dui elementum quam justo primis habitant tortor. Magnis duis ac facilisis nostra massa aliquam lacinia justo, primis placerat sed per nascetur volutpat curabitur, penatibus odio vestibulum orci faucibus ut sagittis. Dignissim montes feugiat maecenas vel suscipit, rutrum eros cras quis dis ornare, lobortis vulputate odio porta.   2

Approve TRF

Reject TRF

If you review the TRF and you identify changes and edits, you can reject the TRF, sending it back to the Reviewer for revisions.

If you review the TRF and you are satisfied with it, you will be ready to provide the final approval of the application.

2. Reviewing the Summary of Panel Discussion

To view/review the **Summary of Panel Discussion (SPD)** created by the primary reviewer, follow the steps below:

1. Navigate to the application page. (See Chapter 4: Reviewing Individual Applications for more information).

2. Click the **View Summary of Panel Discussion** button or click the **View PDF Button** to view a PDF version of the SPD.

Reviewer ID	Reviewer Name	Evaluation Status	View TRF	Score
19992	Christine Newcomer	Submitted to Panel Monitor		--A
24567	Octavia Carter	Submitted to Panel Monitor	View TRF	11.0
24569	Shena Dutch	Submitted to Panel Monitor	View TRF	2.0

Accept Panel Summary   Return Panel Summary   View Summary of Panel Discussion   View PDF Report

3. The **Summary of Panel Discussion** will open in a new tab or window.

4. Review the comments. The SPD will include the Primary Reviewer Comments. Comments are organized by Strength comments followed by Weakness comments followed by General Feedback comments.

| Application Number: | M6RH2 | Panel: | 1 | Average Score: | 11.0 |

Applications: Minnie

City: Washington   State: DC

Summary of Panel Discussion

Strengths

Lorem ipsum dolor sit amet consectetur adipiscing elit mi congue egestas fermentum erat semper blandit rutrum sociis gravida, leo est porttitor sollicitudin auctor conubia nisl natoque dui elementum quam justo primis habitant tortor. Magnis duis ac facilisis nostra massa aliquam lacinia justo, primis placerat sed per nascetur volutpat curabitur, penatibus odio vestibulum orci faucibus ut sagittis. Dignissim montes feugiat maecenas vel suscipit, rutrum eros cras quis dis ornare, lobortis vulputate odio porta.

Weaknesses

Lorem ipsum dolor sit amet consectetur adipiscing elit mi congue egestas fermentum erat semper blandit rutrum sociis gravida, leo est porttitor sollicitudin auctor conubia nisl natoque dui elementum quam justo primis habitant tortor. Magnis duis ac facilisis nostra massa aliquam lacinia justo, primis placerat sed per nascetur volutpat curabitur, penatibus odio vestibulum orci faucibus ut sagittis. Dignissim montes feugiat maecenas vel suscipit, rutrum eros cras quis dis ornare, lobortis vulputate odio porta.

General Feedback

Lorem ipsum dolor sit amet consectetur adipiscing elit mi congue egestas fermentum erat semper blandit rutrum sociis gravida, leo est porttitor sollicitudin auctor conubia nisl natoque dui elementum quam justo primis habitant tortor. Magnis duis ac facilisis nostra massa aliquam lacinia justo, primis placerat sed per nascetur volutpat curabitur, penatibus odio vestibulum orci faucibus ut sagittis. Dignissim montes feugiat maecenas vel suscipit, rutrum eros cras quis dis ornare, lobortis vulputate odio porta.

Close Page

5. Once your review is complete click the **Close Page** button to return to the main screen.

If you review the SPD and you identify changes and edits, you can reject the report, sending it back to the Primary reviewer for revisions.

If you review the SPD and you are satisfied with it, you will be ready to accept the application.
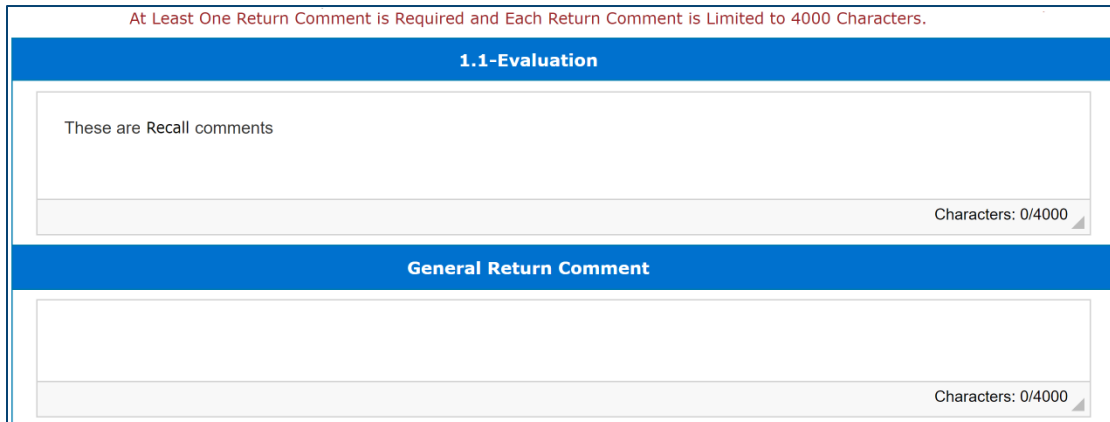
3. Returning a Technical Review Form (TRF)

To reject a Technical Review Form, follow the steps below after clicking the View TRF hyperlink:

7. On the application screen, click the **View TRF** hyperlink.

8. Click the **Reject TRF** button.

```
Approve TRF

Reject TRF
```
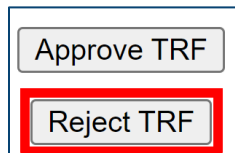
9. Enter your feedback in the appropriate criteria or general textboxes. You may enter individual return comments for each criterion, but only one return comment in one textbox is required.

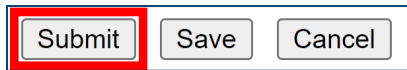| At Least One Return Comment is Required and Each Return Comment is Limited to 4000 Characters. |
|---|
| **1.1-Evaluation** |
| These are Recall comments |
| Characters: 0/4000 |
| **General Return Comment** |
| |
| Characters: 0/4000 |

10. Scroll to the bottom of the screen; click the **Submit** button to return the Technical Review Form to the reviewer. The **Save** button allows you to reset the 30-minute timer and allows you to save the progress made so far if you need to return to the application page or entering comments as you are reviewing the **Technical Review Form (TRF)**. The **Cancel** button allows you to return to the application screen without returning the **Technical Review Form (TRF)**.

Submit	Save	Cancel

11. The status of the TRF will change to **Returned by Panel Monitor**.

Reviewer ID	Reviewer Name	Evaluation Status	View TRF	Score
19992	Christine Newcomer	Submitted to Panel Monitor		--A
24567	Octavia Carter	Returned by Panel Monitor	View TRF	11.0
24569	Shena Dutch	Submitted to Panel Monitor	View TRF	2.0

Accept Panel Summary	Return Panel Summary	View Summary of Panel Discussion	View PDF Report

4. Returning a Summary of Panel Discussion (SPD)

To reject a Summary of Panel Discussion, follow the steps below:

1. Click the **Return Panel Summary** button**. Note:** This button will only be active if the application is in Submitted to Panel Manager status.

Reviewer ID	Reviewer Name	Evaluation Status	View TRF	Score
19992	Christine Newcomer	Submitted to Panel Monitor		--A
24567	Octavia Carter	Submitted to Panel Monitor	View TRF	11.0
24569	Shena Dutch	Submitted to Panel Monitor	View TRF	2.0

Accept Panel Summary	Return Panel Summary	View Summary of Panel Discussion	View PDF Report

2. Enter your feedback in the appropriate criteria or general textboxes. You may enter individual return comments for each criterion, but only one return comment in one textbox is required.

3. Scroll to the bottom of the screen; click the **Submit** button to return the Summary of Panel Discussion to the Primary Reviewer. The **Save** button allows you to reset the 30-minute timer and allows you to save the progress made so far if you need to return to the application page or entering comments as you are reviewing the **Summary of Panel Discussion (SPD)**. The **Cancel** button allows you to return to the application screen without returning the **Summary of Panel Discussion (SPD)**.
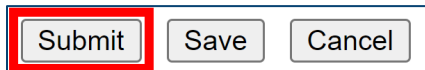

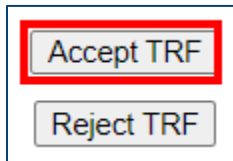4. The status of that application changes to **Returned by Panel Monitor**.

5. Accepting the TRF

When you are satisfied with the **Technical Review Form (TRF)** and no revisions were needed or after all needed revisions are made, you are ready to accept the TRF. You will only be able to accept reviewers' Technical Review Form if it is in a **Submitted to Panel Monitor** Status.

1. Navigate to the application page. (See Chapter 4: Reviewing Individual Applications for more information).

2. On the Application screen, click the hyperlinked View TRF.

3. Scroll to the bottom of the screen and click the **Accept TRF** button.

4. The status of that application will change to **Accepted.**

Reviewer ID	Reviewer Name	Evaluation Status	View TRF	Score
19992	Christine Newcomer	Accepted		--A
24569	Shena Dutch	Returned by Panel Monitor	View TRF	2.0
19992	Octavia Carter	Accepted	View TRF	11.0

Accept Panel Summary	Return Panel Summary	View Summary of Panel Discussion	View PDF Report

If you accept an application in error and determine further changes are necessary, contact your **Session Administrator (SA) to** have them return the application to you. When a **Session Administrator (SA)** returns an application to you, you will be able to return it to the panel for any needed changes.

6. Accepting the SPD

When you are satisfied with the **Summary of Panel Discussion (SPD)** and no revisions were needed or after all needed revisions are made, you are ready to accept the SPD. You will only be able to accept the Summary of Panel Discussion if it is in a **Submitted to Panel Monitor** Status.

1. Navigate to the application page. (See Chapter 4: Reviewing Individual Applications for more information).

2. On the Application screen, click the **Accept Panel Summary** button.

Reviewer ID	Reviewer Name	Evaluation Status	View TRF	Score
19992	Christine Newcomer	Submitted to Panel Monitor		6.50^A
24567	Octavia Carter	Submitted to Panel Monitor	View TRF	13.0
24569	Shena Dutch	Submitted to Panel Monitor	View TRF	0.0

Accept Panel Summary | Return Panel Summary | View Summary of Panel Discussion | View PDF Report

3. Next, click the **OK** button in the confirmation box.

arm.grantsolutions.gov says

Please confirm approving the Summary of Panel Discussion.

OK | Cancel

4. The status of that application will change to **Accepted.**

Reviewer ID	Reviewer Name	Evaluation Status	View TRF	Score
19992	Christine Newcomer	Accepted		_ _^{A}
24569	Shena Dutch	Returned by Panel Monitor	View TRF	2.0
19992	Octavia Carter	Accepted	View TRF	11.0

Accept Panel Summary | Return Panel Summary | View Summary of Panel Discussion | View PDF Report

If you accept an application in error and determine further changes are necessary, contact your Session Administrator (SA) to have them return the application to you. When a Session Administrator (SA) returns an application to you, you will be able to return it to the panel for any needed changes.

IMPORTANT: You must accept all Summary of Panel Discussion (SPD) and Technical Review Forms (TRF) assigned to finalize the Review.

Chapter 8: Review Director Role (Model 8)

Overview

The primary function of the Review Director is to provide final approval for all application evaluations in ARM, certifying the review is complete. This section covers how to return the Summary Report to the **Reviewers** for potential changes and covers approving the Summary Report. **Note:** Model 8 does not include the Chairperson role.

Important: The approval process is key to finalizing remote reviews. Please follow the best practices of your program office and agency concerning when to accept applications. All Applications must be accepted for the session to be closed.

Note: As Review Directors, you may also have monitoring responsibilities, which are covered in Chapter 3: Monitoring the Review Process.

1. When to start your review

Reviewers complete their evaluations in ARM and submit their scores and comments directly to the Review Director.

Once an evaluation is submitted by a reviewer:

- You will receive an email notification from ARM

- The status of the reviewer's evaluation will change to a **Submitted** status.

- Once all reviewers have submitted the evaluations the status will change to a **Submitted to Review Director** Status.

- Reviewer comments and scores are automatically added to the **Summary Report**.

Note: The Summary Report will include all reviewer comments and scores once all reviewer evaluations are in a **Submitted to Review Director** status. However, you are able to start reviewing the Summary Report as reviewers submit their evaluations.

As a reminder to access the Summary Report, you will need to:

1. Click the **Panel Number** the application is assigned to.

2. Click the hyperlinked **Application Name** or **Application Number**.

Please refer to Chapter 4: Reviewing Individual Applications for more information.

2. Reviewing the Summary Report

The Summary Report can be accessed at any point during a review. However, it is important to keep in mind that score and comments will only be available once the reviewers submit their evaluations the first time.

2.1 Accessing the Report

1. On the application screen, click the **View Report** button.

| Accept | Return | Recall Evaluation | View Report | View Raw Comments |
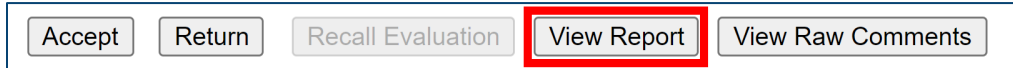
2. The **PDF Summary Report** will open in a new tab or window.

4ARManualP01 Application Name Hyperlink

ARM Training Agency
FY22 ARM Manual
FINAL SUMMARY OF CRITERION SCORES

Application Number: 4ARManualP01   Panel: 1
Application Name: Application Name Hyperlink
State: FN   City: .

Criteria	Max	T.Calif	O.Carte	K.Davis
1. Objectives and Need for Assistance	20	4	5	7
2. Approach	50	3	6	5
3. Evaluation	20	2	4	4
4. Organizational Capacity	10	2	2	6
Total:	100	11.0	17.0	22.0
Average:			16.67	

3. Under the reviewer Scores table, the **Summary Report** lists the comments added to the Summary Report by criterion and then by category.

4ARManualP01 Application Name Hyperlink

Criteria	Page

1. Objectives and Need for Assistance

Strength

Lorem ipsum dolor sit amet, consectetur adipiscing elit suscipit auctor, quisque orci placerat. Ut duis accumsan potenti vel cras, eget dapibus placerat semper suscipit tempus, integer porta at volutpat. Donec imperdiet eros natoque posuere vulputate ridiculus egestas cras, curabitur nec porttitor vel laoreet nostra primis faucibus, velit tristique scelerisque praesent proin viverra pretium.   4

Lorem ipsum dolor sit amet consectetur adipiscing, elit netus pellentesque dictum eros proin sem, turpis lacinia duis ad iaculis. Proin netus nulla libero imperdiet litora ultrices conubia, dictumst purus accumsan arcu laoreet pharetra lectus condimentum, sed nascetur malesuada nibh potenti id. Ultricies eget velit vulputate sollicitudin tortor phasellus vitae praesent volutpat gravida auctor, potenti bibendum scelerisque quam aptent libero pharetra aliquam augue commodo.   Category 1

Weakness
None

IMPORTANT: The comments section of the Summary Report does not display reviewer names. As you are reviewing the Summary Report, it is recommended to have the Raw Comments screen available if an evaluation needs to be return to a reviewer.
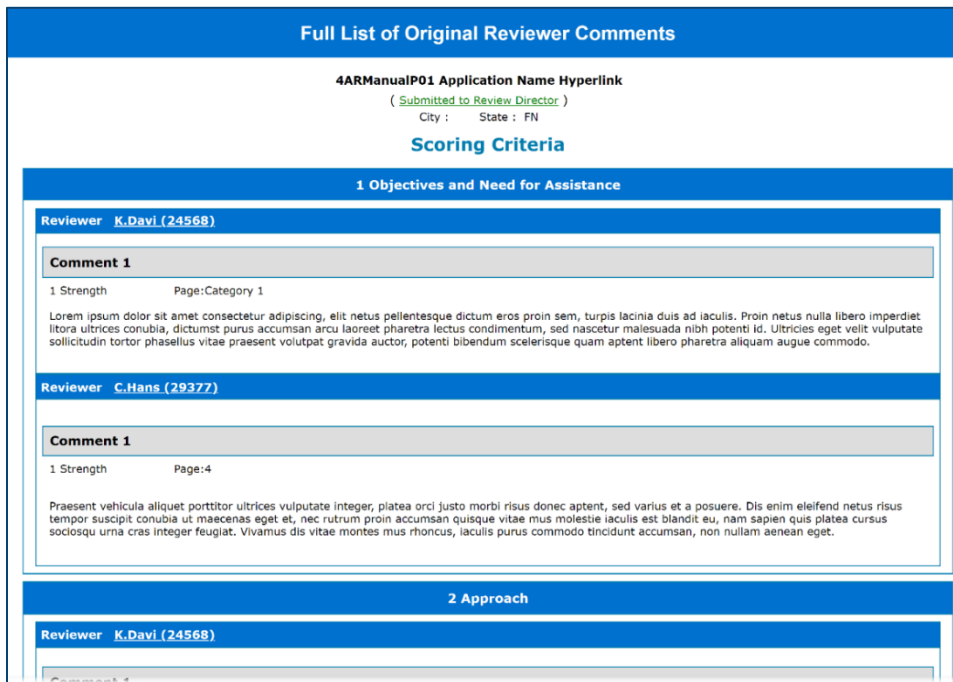
2.2   Accessing Raw Comments

Accessing the Raw Comments Screen will allow you to identify to comments entered of a specific reviewer. This screen can help when returning a Summary Report.

1. Click the **View Raw Comments** button.

| Accept | Return | Recall Evaluation | View Report | View Raw Comments |
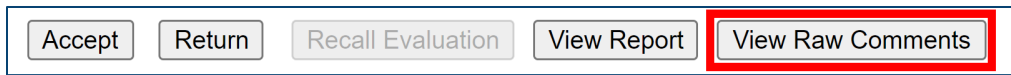
2. The comments will open in a new tab or window.

3. # Returning the Summary Report

During a review you may need to return an evaluation to a reviewer as Reviewer Directors are unable to make changes to the Summary Report.

1. Navigate to the application page. (See Chapter 4: Reviewing Individual Applications for more information)

2. Click the **Return** button.

| Accept | Return | Recall Evaluation | View Report | View Raw Comments |
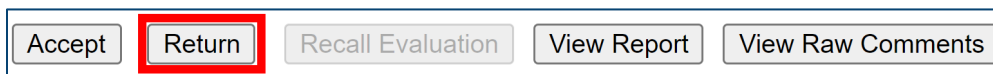
3. Select the **reviewer/reviewers** you wish to return the evaluations to by clicking on the respective checkbox next to their name or names.

Return Evaluation to the following reviewer(s) for reconsideration:

☑ (Evaluation Submitted to Review Director)
☐ (Evaluation Submitted to Review Director)
☐ (Evaluation Submitted to Review Director)
At Least One Return Comment is Required and Each Return C

1.1-Evaluation

3. Enter your feedback in the appropriate criteria or general textboxes. You may enter individual return comments for each criterion, but only one return comment in one textbox is required. You can also format your return comments.

At Least One Return Comment is Required and Each Return Comment is Limited to 4000 Characters.

1.1-Evaluation

These are return comments

Characters: 0/4000

General Return Comment

Characters: 0/4000

4. Scroll to the bottom of the screen; click the **Submit** button to return the evaluation to the reviewer. The **Save** button allows you to reset the 30-minute timer and allows you to save the progress made so far if you need to return to the application page or entering comments as you are reviewing the Summary Report. The **Cancel** button allows you to return to the application screen without returning the evaluation.

Submit   Save   Cancel

5. The status of that application will change to **Returned by Review Director.**

4. Recalling a Summary Report

The **Recall Evaluation** button is a feature in ARM that allows you to **Recall** a returned Summary Report from the Chairperson. The **Recall** button only becomes available once the application is in the **Returned by Review Director** status.

To recall an evaluation:

1. Click the **Recall Evaluation** button.

Accept   Return Evaluation   Recall Evaluation   View Report   View Raw Comments

2. Select the **reviewer/reviewers** you wish to recall the evaluation from by clicking on the respective checkbox next to their name or names. **Note: You can only recall evaluations that have been returned previously.**

3. Enter your feedback in the appropriate criteria or general textbox. **Note**: Only one recall comment is required to return evaluations.

4. Click the **Submit** button to recall the Summary Report from the Reviewers. **Note:** You do not need to click the save button before returning the evaluation. The **Save** button allows you to save the feedback as you enter it to avoid loss of comments if a timeout or if you need to return to the Evaluation Screen.

Once an evaluation has been returned to the Status of the Application will revert to the **Submitted to Review Director status** and the return history screen will be updated to include your recall comments.

5. Accepting the Summary Report

Once you are satisfied with the Summary Reports, you are ready to accept the Summary Report.

1. Navigate to the application page. (See Chapter 4: Reviewing Individual Applications for more information)

2. Click the **Accept** button. **Important:** The accept button will only be active once all reviewer evaluations are in a **Submitted to Review Director** status.

Reviewer ID	Reviewer Name	Evaluation Status	Score
19992	Christine Newcomer	Submitted to Review Director	8.0
37663	Karl Davis	Submitted to Review Director	33.0
39306	Cynthia Hansard	Submitted to Review Director	33.0

Accept | Return | Recall Evaluation | View Report | View Raw Comments

The status of that application will change to **Accepted**.

Reviewer ID	Reviewer Name	Evaluation Status	Score
19992	Christine Newcomer	Accepted	8.0
37663	Karl Davis	Accepted	33.0
39306	Cynthia Hansard	Accepted	33.0

Accept | Return Evaluation | Recall Evaluation | View Report | View Raw Comments

This now certifies that the review of that application is complete and satisfactory. If you accept an application in error and determine further changes are necessary, contact your Session Administrator (SA) to have them return the application to you.

IMPORTANT: You must Accept all applications assigned to finalize the review.

Chapter 9: Reports

Overview

This section covers the reporting capabilities of the ARM system. As a Panel Manager, Panel Monitor and Review Director for a review session, you can generate reports that will provide useful information at all stages of your review session. The availability of the reports will depend on the stage that your review is in, the ARM process module being used and how your agency is set up in ARM.

The Review Status Report by Panel

This report, available in HTML and Excel formats, provides you with a summary of each panel's progress by providing information on the number of applications that are in the approval process. Applications that are in the Submitted to Review Director, Returned by Review Director, Returned by Panel Manager, Submitted to Panel Manager and Accepted statuses are in the Approval Process.

The Client Snapshot Report

This report, available HTML, PDF, and Excel formats, provides you with information about the total applications that have been assigned to each panel, the number of applications that have been accepted, by panel, and the total number of applications still in review.

The Reviewer Activity Report

This report, only available in Excel format, lists the number of applications each Reviewer has in the Submitted to Chair status

COI Report

At any time during or after a review, you can now generate a COI audit report, which will provide you with the date/time that the user confirmed their COI designation. It will also provide you with the history of the COI selection in the case a user made multiple choices during their process.

This report is only available in Excel format.

Chapter 10: Panelist Feedback

Overview

The Feedback Loop provides a single system point of access in ARM for review leaders to record performance assessments simply and quickly about their panelists "**on-demand**" throughout the review process and/or at a defined point in time. ARM will automatically transfer all feedback collected back to a panelist's RRM record 30 days after the close of the review and is made available when doing reviewer searches and related reports.

Administrators and Monitors may enter feedback when the session status is **In-Review** or **Post-Review**. Once the session goes to the **complete** status, all assessments will be transferred to RRM and the feedback hyperlink for that session will be disabled.

If an agency is not currently using RRM, the information captured for panelist feedback will be stored. Agencies can choose to use the functionality in a way that best fits their needs.

This feature is not available in Model 6.

1. Panelist Feedback: Evaluating Panelists

To enter feedback for a specific reviewer:

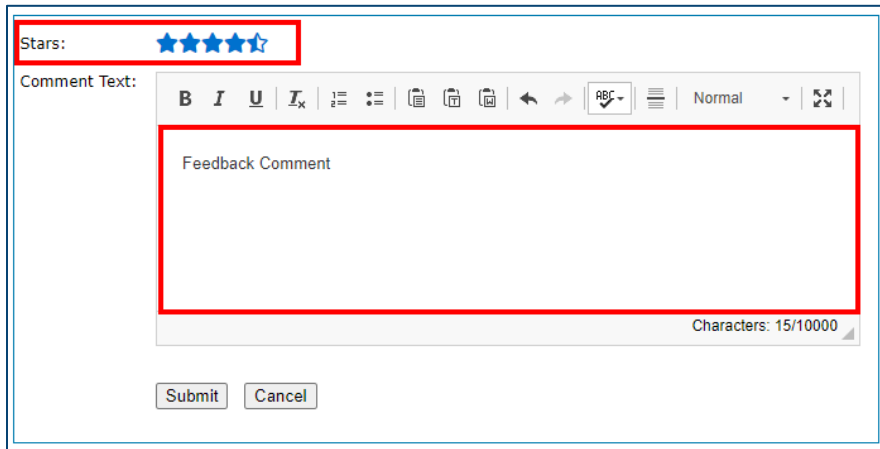1. Click the **Panelists Feedback** button from the session screen.

2. To enter feedback, click the **Feedback** hyperlink in the feedback column for the respective panelist.

Session ID:		FY1ADMIN			
Session Name:		FY21 Admin Manual			
ID	Name	Role	Panel	Stars	Feedback
24566	Cynthia Hansard	Chair	2	☆☆☆☆☆	Feedback
29380	Patricia Wilson	Chair	1	☆☆☆☆☆	Feedback
29380	Patricia Wilson	Reviewer	2 1	☆☆☆☆☆	Feedback
29379	Portia Oliver	Chair	1	☆☆☆☆☆	Feedback
29379	Portia Oliver	Reviewer	2 1	☆☆☆☆☆	Feedback
24569	Shena Dutch	Chair	1	☆☆☆☆☆	Feedback
24569	Shena Dutch	Reviewer	2 1	☆☆☆☆☆	Feedback
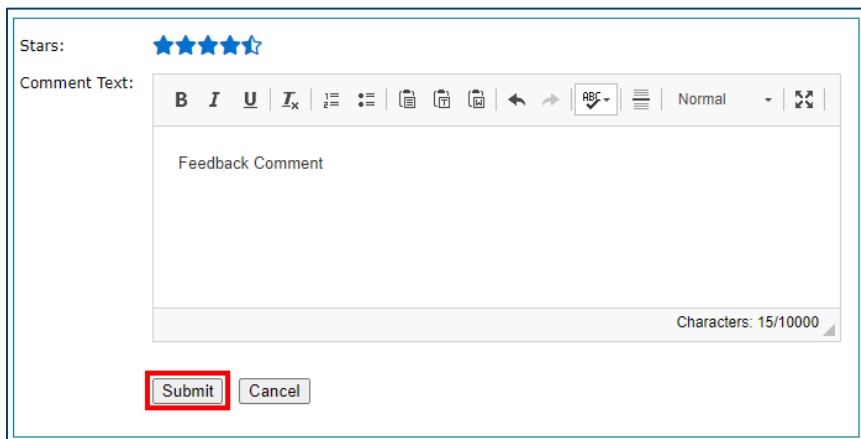
3. You can then enter a star rating and then provide the feedback in the Comment text box.

4. Click **Submit** to save your entries.

You will be returned to the panelist List screen, which will now display the given star rating. If you wish to update/modify your entry, simply click on the Feedback hyperlink.

Session ID:	FY1ADMIN				
Session Name:	FY21 Admin Manual				
ID ▲ ▼	Name ▲ ▼	Role ▲ ▼	Panel ▲ ▼	Stars	Feedback
24566	Cynthia Hansard	Chair	2	★★★★⯪	Feedback
29380	Patricia Wilson	Chair	1	☆☆☆☆☆	Feedback
29380	Patricia Wilson	Reviewer	2 1	☆☆☆☆☆	Feedback
29379	Portia Oliver	Chair	1	☆☆☆☆☆	Feedback
29379	Portia Oliver	Reviewer	2 1	☆☆☆☆☆	Feedback
24569	Shena Dutch	Chair	1	☆☆☆☆☆	Feedback
24569	Shena Dutch	Reviewer	2 1	☆☆☆☆☆	Feedback

Appendix A: Role Definitions

Introduction

The Application Review Model (ARM) is a key component of the Grants Center of Excellence's (COE's) GrantSolutions ecosystem. The web-based ARM delivers a robust system to review grant applications, and ensures the seamless organization, evaluation and management of grant application lifecycle. Fair and comprehensive reviews through a standardized review process are at the heart of the ARM system. ARM participants can access the system 24/7/365 offering reviewers easy access from their home, office or remote location.

Role Definitions

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.

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, Panel Manager, 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, 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 and Panel Managers 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.

Panel Coordinator (PC)

This role is only available in Model 7.

The primary function of the Panel Coordinator is to create panels and manage assignments in an established review session. They manage all panel assignments and changes for the Reviewers, Chairpersons, and applications. Panel Coordinators cannot add new Reviewers, Chairpersons, or applications to the review session.

Review Director (RD)

This role is available in Models 1-5, 7.

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 assigned to them by the Agency Administrator or a Session Administrator. (Previously known as PAM)

Competition Manager (CM)

This role is only available in Model 6

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 assigned to them by the Agency Administrator or a Session Administrator.

Panel Manager (PM)

This role is available in Model 5 only.

Generally, this role is filled by Federal program staff who have the responsibility to provide initial approval of application evaluations in ARM Model 5 Only. They are able to monitor all review related activities in ARM while the review is in progress, and can receive all Summary Reports for initial review. (Previously known as SAM)

Panel Monitor (PM)

This role is available in Model 6 only.

Generally, this role is filled by Federal program staff who have the responsibility to provide initial approval of application evaluations in ARM Model 6 Only. They are able to monitor all review related activities in ARM while the review is in progress, and can receive all Summary Reports for initial review.

Chairperson/Notetaker/SSO:

The primary system function of this role is to compile the Reviewer's comments into a 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. Chairpersons 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 Chairperson often has duties outside of the system to facilitate the panel discussion and coordinate the Reviewers. This role is also referred to as a Note Taker, SSO, and Primary Reviewer.

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 Chairperson/Note Taker/SSO.