CHAIRPERSON

User's Manual

Application Review Module (ARM)

PLEASE NOTE: The Application Review Module (ARM) is a system that is designed as a shared service and is maintained by the Grants Centers of Excellence for multiple federal agencies. As a result, instructions are written to be general in nature and not reflective of any specific agency policy. Users should follow their own agency's policies and procedures with regards to the processing of grant reviews.

Table of Contents

About ARM

About ARM

ARM is a web-based application used to assist the Federal grant application reviewing process. It provides a user-friendly environment to facilitate the grant review process while allowing reviewers to participate from remote locations.
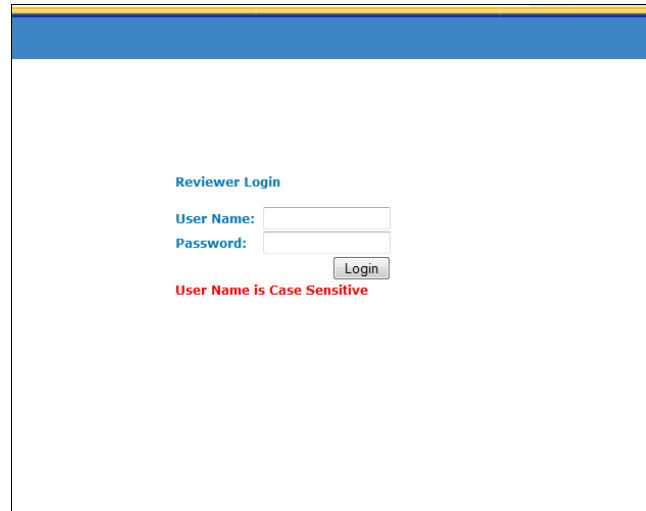
❖ The primary users for ARM are the Reviewer, Chairperson, Secondary Area Manager (SAM), and Federal Program Area Manager (PAM).

❖ The Chairperson has the responsibility of building a Final Summary Report in ARM, and creating a comprehensive document of comments provided by the panel reviewers.

Accessing ARM

Accessing ARM

You will be provided a Username and Password as well as the link to the website prior to your review.

1. Enter your *username* and *password* in the appropriate boxes and click the [Login] button.

2a. **Select Your Session**
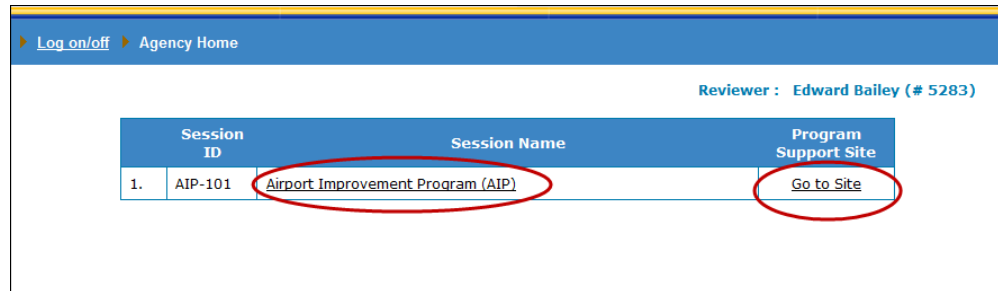   If you are participating in multiple reviews, you will need to the select the session you would like to work on. Click on the link to select your session.
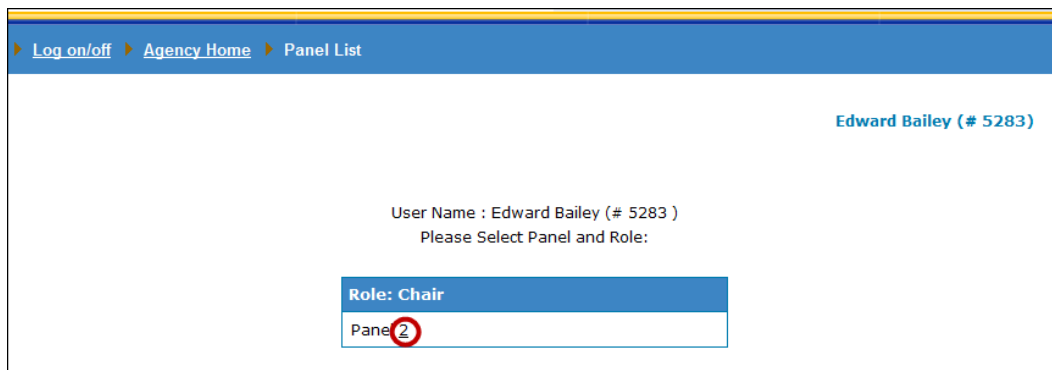
Note: If the "Program Support Site" column has a Go to Site link visible, clicking on the link will open an outside website in a new window.

Starting the Review
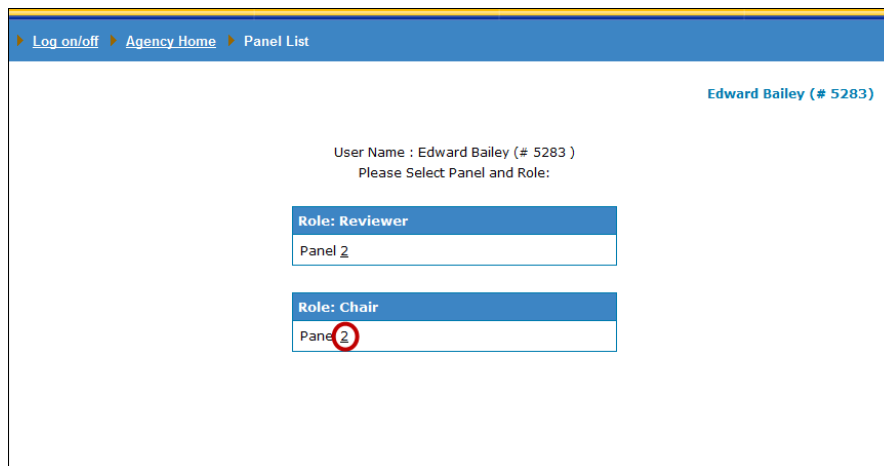
Accessing Your Applications

2b. Select Your Panel
Click on the number of your panel which is a link to select your panel.

2c. Select Your Role
On the rare occasion that you are serving dual roles (Chairperson and Reviewer), you will have to select the panel associated with the Chairperson role.

Starting the Review

Application Selection Screen

This screen displays six major identifiers of the application:

- ❖ **Application Number**
- ❖ **Application Name**
- ❖ **Status**
- ❖ **Average Score**
- ❖ **Evaluations Available**
- ❖ **Comments Added**
- ❖ **Application PDF File (optional)**

GrantSolutions.gov
Application Review

AIP-101　　　　Chair
Panel : 1　　Edward Bailey (# 5283)
Log on/off

▶ Log on/off ▶ Agency Home ▶ Panel List ▶ Applications List

Panel: 1　Chair : Edward Bailey (# 5283)

Score with * is incomplete.

Application Number	Application Name	Status	Average Score	Evaluations Available	Comments Added	Application PDF File
AIP-1001	Birmingham-Shuttlesworth International	Submitted to Chair	89	3 / 3	1	Open PDF
AIP-1002	Ted Stevens Anchorage International	In-review	--	0 / 3	0	Open PDF
AIP-1003	Phoenix Sky Harbor International	In-review	--	0 / 3	0	Open PDF
AIP-1004	Jackson-Evers International	In-review	--	0 / 3	0	Open PDF
AIP-1008	Newark Liberty International	In-review	--	1 / 3	4	Open PDF

❖The Chairperson will need to identify those applications in the "*Submitted to Chair*" status to begin their work.

Note: In the score column, if the score shown is a double dash (--) one or more of your Reviewers have not submitted the application to the Chairperson.

Starting the Review

Application Selection Screen- Understanding Your Progress

❖The column titled "Average Score" shows the average score of all of the reviewers' totals.

❖The column titled "Evaluations Available" shows how many reviewers have submitted their evaluations to you. For example, 1 out of 3 reviewers (1/3).

❖ The column titled "Comments Added" shows how many comments (strengths and weaknesses) have been added to the Final Summary Report for that application.

GrantSolutions.gov
Application Review

AIP-101   Chair
Panel : 1   Edward Bailey (# 5283)
Log on/off

▶ Log on/off ▶ Agency Home ▶ Panel List ▶ Applications List

Panel: 1   Chair : Edward Bailey (# 5283)

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AIP-1004	Jackson-Evers International	In-review	--	0 / 3	0	Open PDF
AIP-1008	Newark Liberty International	In-review	--	1 / 3	4	Open PDF

Application Status Definitions

Pre-Review – You, the Chairperson, have not yet accessed the evaluation, and the reviewers have not completed their work.

In Review – The panel reviewers have ownership of this application and have not yet submitted the application evaluation to the Chairperson. You are monitoring your panel at this stage.

Submitted to Chair – Your entire panel has completed their evaluations of this application and have clicked their "Submit to Chair" button giving you access to their full summaries. A Reviewer cannot make any changes while an application is in this status.

Returned by Chair – You have paneled and identified changes needed at the reviewer level. As the Chairperson, you have returned the evaluations to one or more Reviewers for more work. A Chairperson cannot make any changes while an application is in this status.

Submitted to SAM – All Reviewers on your panel have submitted the application to the panel Chairperson, and the Chairperson has approved all of your comments and scores and submitted the application to the SAM for preliminary approval. When in the *Submitted to SAM* status, the panel no longer can make edits to this application report until it is returned to the panel for changes.

Returned by SAM – After a panel has completed their first session and submitted the comments and scores to the SAM, the SAM will review them and if necessary return them to the Chairperson with comments for changes or clarifications.

Submitted to PAM – You have completed compiling your Final Summary Report, to include all scores and comments by your panel, and clicked the Submit to PAM button to send the application to the PAM for final approval. When in the *Submitted to PAM* status, the panel no longer can make edits to this application report until it is returned to the panel for changes.

Returned by PAM – After a panel has completed their first session and submitted the comments and scores to the PAM, the PAM will review them and if necessary return them to you with comments for changes or clarifications.

Approved – Once the PAM approves the Final Summary Report for an application, the status will immediately change to "Approved" and no further changes are required or permitted. The Approved status signifies the beginning of the finalization process for all Reviewers and Chairpersons.

Application Selection

Application Selection Screen

3. Click on the hyperlinked **Application Name** to advance to the Application Evaluation Screen and begin your review.

Chairperson's Panel Review

Application Evaluation Screen

This screen serves as the primary control panel for working with an individual application.

❖ The scoring criteria are listed in the first column.

❖ The middle column is where you will need to click and build your Final Summary Report by criterion.

❖ The remaining columns are views of your individual panelists' scores. The score will automatically average at the bottom of the screen based on the number of reviewers.

| ▸ Log on/off ▸ Agency Home ▸ Panel List ▸ Applications List ▸ Evaluation |

Panel: 1   Chair : Edward Bailey (# 5283)

AIP-1001 Birmingham-Shuttlesworth International
(Submitted to Chair)
City : Birmingham   State : AL

Criteria	Comments	E.Bail (5283)	J.Flow (4048)	S.Stro (4049)
1 Approach (Max. 25 points)	Comment	22	22	23
2 Budget and Budget Justification (Max. 25 points)	Comment	19	25	23
3 Job Creation (Max. 25 points)	Comment	23	19	25
4 Design of Project (Max. 25 points)	Comment	25	22	18
	Actual Score	89	88	89
	Average:		89	

[Submit to SAM] [Return Evaluation] [View Report]

Chairperson's Comments Review

Application Evaluation Screen
This screen is the starting point to building your Final Summary Report for an application.

4. Click on the hyperlinked **Comment** link to advance to review, add, and edit reviewers' comments for this individual application.

❖ *You will need to evaluate the individual reviewers' comments for inclusion in the Final Summary Report by individual criterion.*

Chairperson's View Comments

Comments Screen

As the Chairperson you will create the final set of comments which will compile the Final Summary Report .

5. Click on the <u>View and Include Reviewer Comments</u> link to view, select, and edit your panel reviewers' comments for the Final Summary Report.

❖ *Chairpersons are also able to Add New Comments as needed. Instructions on adding new comments are on page 16, however, it is not a required task for the Chairperson.*

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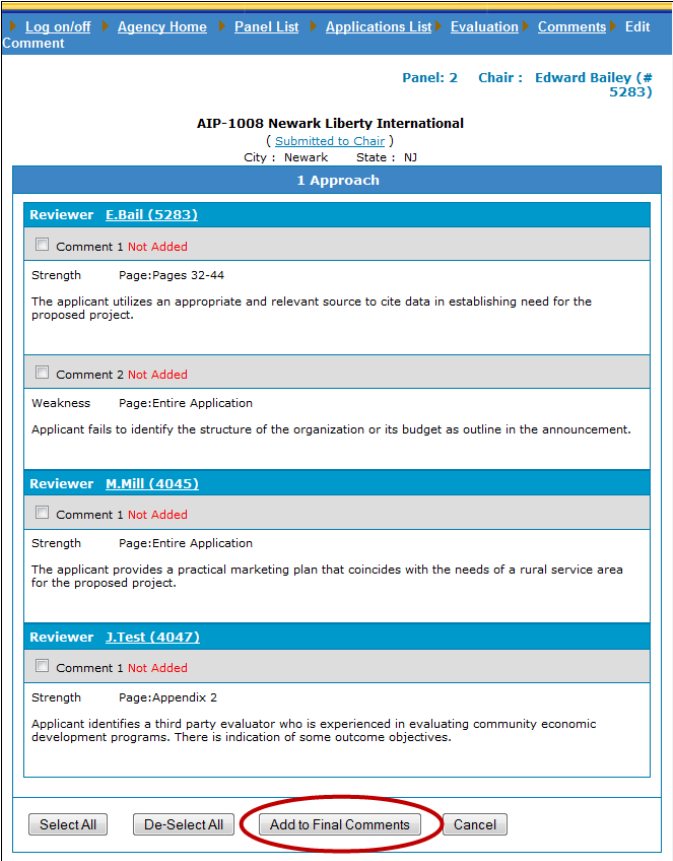
Chairperson's View Comments

View and Include Reviewer Comments

Step 5 in slide 11 will open the Edit Comments and display the comments made by Reviewer for you to read and select.

6. Click on the check-box next to the comment you would like to include in your Final Summary Report. You can select multiple checkboxes on this screen.

7. After selecting the comments click the **Add to Final Comments** button to save them as part of your Final Summary Report.

   Note: Before comments are added they show a status of "Not Added" in red text. This will change to "Added" when the comment is added to the Final Comments.

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Chairperson's View Comments

Final Summary Comments

- ❖ The selected comments will be displayed in a list form.

- ❖ All comments listed on the Comments screen will become part of your Final Summary Report.

- ❖ The date and time of when the comments were added will also be displayed.

- ❖ You can Edit or Delete these comments at any time.

8. Click on the hyperlinked word Evaluation in the bar at the top of your screen to return to the Application Evaluation Screen.

Note: *Any comment Edits or Deletions made ONLY affect the Final Summary Report. They will not change on the Reviewer's evaluation.*

Application Evaluation Comments

Viewing and Adding All Comments for All of the Criteria in One Screen

You may view all of the comments submitted by the reviewers for all of the criteria from one screen.

❖ Click on the header <u>Comments</u>.

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Application Evaluation Comments

Viewing and Adding All Comments for All of the Criteria in One Screen

❖ A new page will open and you will be able to check off the comments you would like to add to the Final Summary Report.

❖ Click on the "Add to Final Comments" button to finalize your selections.

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Chairperson's View Comments

Comments Screen

As the Chairperson, you may enter a comment of your own and it will automatically be included in the Final Summary Report.

❖ Click on the <u>Add a New Comment</u> link to advance to the add comment screen.
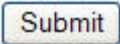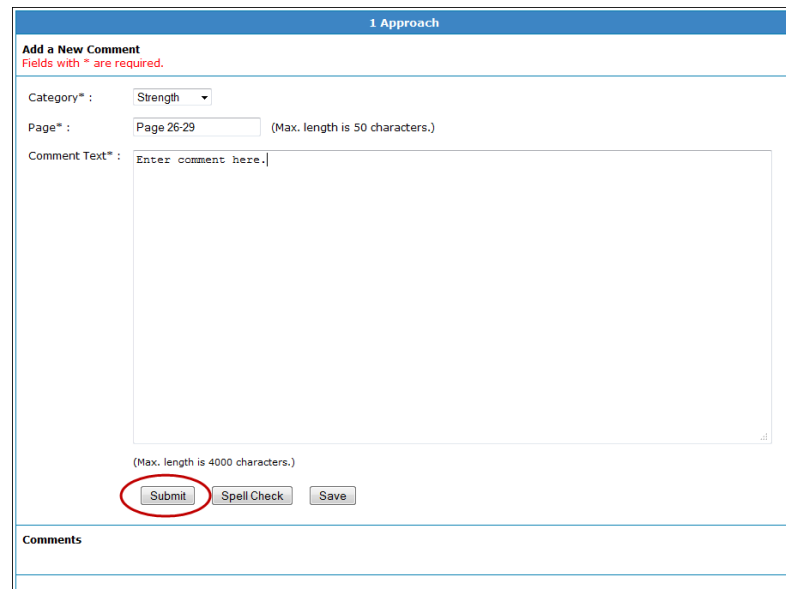
Chairperson's Comment Entry

Adding New Comments

Clicking the <u>Add a New Comment</u> link will open the Comments window.

A. Click on the drop-down arrow to open the menu. Select whether your comment is a "Strength" or a "Weakness"

B. Enter a page number or any page identifying information.

C. Enter your comment. You can type directly into this field or copy and paste from a word processing program. After entering the comment it is strongly recommended you Spell Check your work.

D. Click [Submit] to **save** your comment as part of your evaluation.

Session Time-Outs and Preventing Data Loss

Session Time Out

❖ In order to provide maximum data security, the ARM system sessions are designed to "Time-Out" after 30 minutes of inactivity. After 25 minutes, if you are not clicking between ARM web pages, a warning message will appear. If no action is taken within 5 minutes, you will be timed out. **Any unsaved work will be lost. It is Highly recommended that you take advantage of the SAVE button.**

Message from webpage

⚠ Your session is about to timeout. Please click the 'OK' button and then click on the 'Save' button to save your work and continue with your session.

OK

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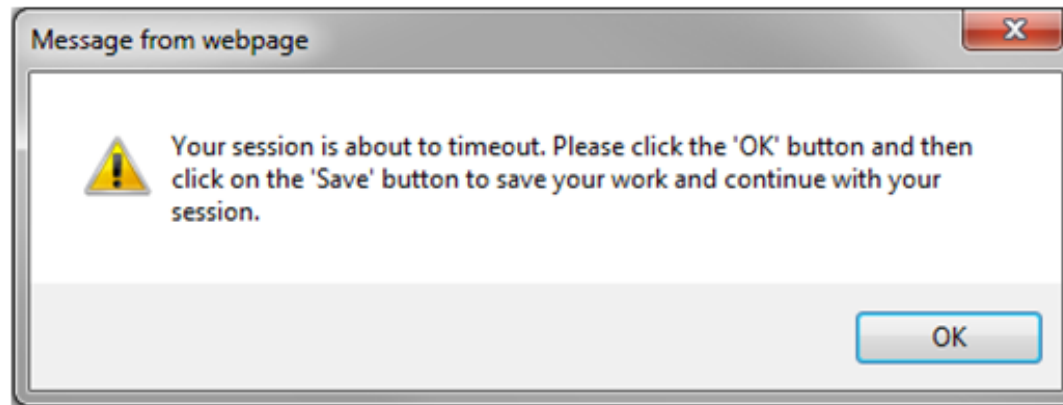
Application Evaluation Comments

Saving and Retrieving Saved Comments

❖ **Clicking on the SAVE button will allow you to save data into the ARM system. The data will remain even if you time out or you decide to enter additional text at a later time. It is important that you click on the "Submit" button to finalize the comment even if you have saved the comment. Clicking on the submit button will provide you the opportunity to continue adding additional comments.**

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Application Evaluation Comments

Saving and Retrieving Saved Comments

❖ **Clicking on the "Retrieve the Last Comment" link will load the comment that was saved most recently. In case of a time out, you should go to the respective criteria and click on the "Retrieve the Last Comment" link in order to retrieve the comment you were working on.**

Application Evaluation Comments

Adding Multiple Comments

You can enter multiple comments for each criterion.

- ❖ To enter multiple comments, repeat steps A-D on the previous page.
- ❖ All previous comments will be visible below the links to Add a New Comment and View and Include Reviewer Comments
- ❖ Comments will organize by category (Strength or Weakness), regardless of the order in which they were entered.
- ❖ You can use the Edit/Delete links to make changes.

Note: All new comments added by the Chairperson automatically become part of the Final Summary Report. If you no longer want to include one of your new comments, you will need to Delete it.

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Return Evaluations

Submit or Return the Evaluations
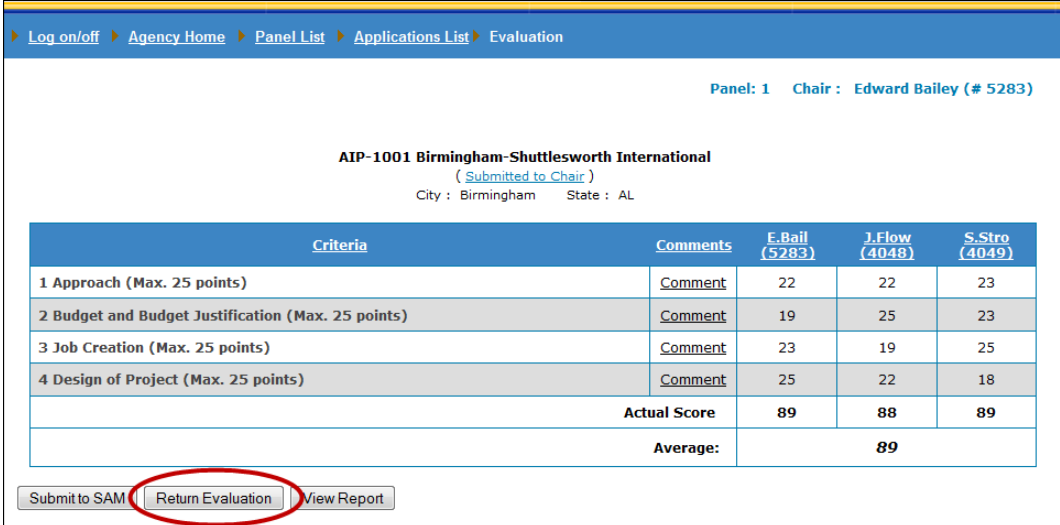
9. Return Evaluations
Click the [Return Evaluation] button to return your Reviewers' individual evaluations to one or more of your Reviewers.

Note: Any comments which were edited by the reviewers will need to be added to the Final Summary Report and draft comments should be deleted.

❖ **Submit to SAM**
If you do not need to return any evaluations and are ready to submit the Final Summary Report to the Secondary Area Manager (SAM) for their review, skip to Step 14.

Evaluation Return Comments

Returning Evaluations

You may need to return Reviewer evaluations for edits. ARM will allow you return to Reviewers individually, or if needed, to the entire panel at once.

10. Select the Reviewer(s) whose evaluation you would like to return using the checkbox next to their name.

11. Enter the comments you would like to communicate back to your reviewers. You may enter individual return comments for each criterion. At least one return comment is required. Each field has a 4000 character limit.

12. Click the [Submit] button to send the evaluation back. You may also save the comment and return to it at a later time.

Returned Evaluations

Returned by Chairperson

❖ After returning one or more of the reviewers' evaluations, the application status changes to "**Returned by Chair**".

❖ The Chairperson will not be able to access the panel scores for a returned evaluation until it is re-submitted by the respective reviewer(s).

❖ You will need to repeat Steps 4-12 until you are satisfied with your compiled Final Summary Report.

| | Log on/off | Agency Home | Panel List | Applications List |

Panel: 1   Chair : Edward Bailey (# 5283)

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AIP-1004	Jackson-Evers International	In-review	--	0 / 3	0	Open PDF
AIP-1008	Newark Liberty International	In-review	--	1 / 3	4	Open PDF

Final Summary Report

Reviewing the Final Summary Report

❖ After all of your reviewers have re-submitted their application evaluations and you have re-compiled the comments, you will need to review the Final Summary Report.

13. Click on the [View Report] button to open the Final Summary Report in a new window. This report is generated in a PDF format.

Final Summary Report

Reviewing the Final Summary Report

❖ Your Final Summary Report will be a multi-page document. This includes your panel's scores and all of the comments you have chosen. These are grouped by criterion and organized with the strengths listed first followed by the weaknesses for each. The comments are then ordered by the numerical page entry first, and then alphabetically.

Note: In a remote review the signature line for the Chairperson will only appear on the first page after the application is in the "Approved" status.

Final Summary Report

Tips for Reviewing the Final Summary Report

❖ Ensure that the report does not contain duplicate comments (a comment may be added in duplicate if it is selected multiple times). Duplicate comments should be removed prior to submission.

❖ Spell-Check all comments.

Submit to SAM

Submit to SAM

When the Final Summary Report is complete, the Chairperson needs to submit it to the SAM for their review and preliminary approval.

14. Click on the "Submit to SAM" button to send your panel's Final Summary Report to the SAM.

❖ Once you submit to SAM, you will no longer be able to make any changes until the evaluation is returned to you by the SAM.

Returned by SAM

Returned by SAM

When the status of your application changes to Returned by SAM you will need to take your next steps.

❖ After you complete Step 14, the status of an application will change to "**Submitted to SAM**".

❖ The status of an application will change to "**Returned by SAM**" once the SAM has reviewed your document and returns it to you for changes.

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Returned by SAM

Returned by SAM

15. To begin the process of editing your application evaluation, click on the Application Name, as you did in Step 3 to open the Application Evaluation Screen.

16. Click on the Returned by SAM status link. This will open the Returned History view in a new window.

❖ The Returned History page indicates the date your report was returned and the reason why. It is a direct message from your SAM identifying the changes that need to be made. All returned comments will be stored here, with the most recent message listed first.

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Returned by SAM

Making SAM Requested Changes

If you can make the changes yourself:

17. Refer to the appropriate criterion, and click the <u>Comment</u> link to add/edit comments.

If you cannot make the changes yourself:

17. Repeat Steps 9-12 to return the evaluations to your reviewers to make comments and/or score changes, and then re-submit to your SAM.

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Completing Your Review

Completing Your Review

When an application status reads "Approved", your evaluation role is complete. However, you must still print, sign, and return hard copies of the entire Final Summary Report.
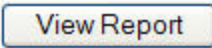
18. Identify the application's status as Approved.

19. Click on the Application Name to open the Application Evaluation Screen.

	Log on/off	Agency Home	Panel List	Applications List

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AIP-1003	Phoenix Sky Harbor International	In-review	--	0 / 3	0	Open PDF
AIP-1004	Jackson-Evers International	In-review	--	0 / 3	0	Open PDF
AIP-1008	Newark Liberty International	Approved	87	3 / 3	3	Open PDF

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Completing Your Review

Printing the Final Summary Report

20. Click on the [View Report] button to open the Final Summary Report in a new window. This report is generated in a PDF format.

21. Confirm that this is the Approved report by checking that a blank signature line appears with your name beneath it, as well as a line for you to date your score report.

22. Print the entire report to include the score sheet and **ALL** of the subsequent comment pages.

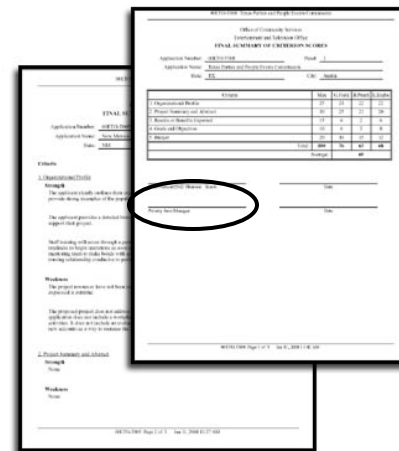23. **Sign the first page and attach the remaining pages behind it.**

New Features in ARM

Return Comments per Criterion

In previous versions of ARM, when the Chairperson returned an evaluation to the Reviewer(s), they were only given one return comment text box which had a 4000 character limit.

With this new feature, Chairpersons can now send return comments for each criterion. Each return comment per criterion has a 4000 character limit. We have also added a "General Return Comment" text box which is the only mandatory return comment field.

Each Return Comment is limited to 4000 Characters

1-Approach

Return Comments go here for each criterion.

2-Budget and Budget Justification

Return Comments go here for each criterion.

4-Impact on Community

Return Comments go here for each criterion.

*General Return Comment

This is the "General Return Comment" field which is mandatory.

Each Return Comment is limited to 4000 Characters

Submit   Cancel   Save   Spell Check

End

Please do not forget to sign and submit all of your required paperwork.

Thank you.