APPLICATION REVIEW MODULE: REVIEWER USER MANUAL
# Table of Contents

Introduction .................................................................................................................................................. 3  
Role Definitions ......................................................................................................................................... 3  
ARM Process Model 5 Overview ............................................................................................................... 4  
  Panel Structure .................................................................................................................................. 4  
  Comments ........................................................................................................................................... 4  
  Role Responsibilities ............................................................................................................................. 4  
  Other .................................................................................................................................................... 4  
Navigating ARM ........................................................................................................................................ 4  
System Timeout ........................................................................................................................................ 4  
ARM Application Status Definitions .......................................................................................................... 5  
Accessing ARM ........................................................................................................................................ 7  
  Logging in: ........................................................................................................................................ 7  
  Accessing Your Review Session .......................................................................................................... 8  
Starting Your Evaluations .............................................................................................................................. 9  
  Application List Overview .................................................................................................................. 9  
  The Evaluation Screen ......................................................................................................................... 10  
  Accessing Review Criteria Descriptions ............................................................................................. 11  
Adding Scores and Comments .................................................................................................................... 12  
  Entering Scores and Comments Together ......................................................................................... 12  
  Entering Scores and Comments Separately ....................................................................................... 16  
  Entering Scores .................................................................................................................................. 16  
  Entering Comments ............................................................................................................................ 17  
  Non-Scoring Criteria ........................................................................................................................... 18  
Viewing Scores and Comments ................................................................................................................... 19  
  How to View Scores and Comments .................................................................................................. 19  
Submitting Evaluations ............................................................................................................................... 21  
  How to Submit Evaluations to the Chairperson .................................................................................. 21  
Returned Evaluations ............................................................................................................................... 22  
  Checking the return History ............................................................................................................... 22  
  Editing Evaluations and Resubmitting to the Chairperson ............................................................... 23  
Completing the Review ............................................................................................................................... 24  
  Printing Score Reports ......................................................................................................................... 24  
Managing Your Account .............................................................................................................................. 26
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.

Reviewers: 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.

Chairperson: As the facilitator of the panel members and panel discussion process, the Chairperson is responsible for monitoring the progress of their panel’s Reviewers as well as compiling the Reviewer’s comments into a final summary report produced in ARM. They are responsible for ensuring all assigned applications meet the objective of the review, and are provided to the PAM.

Secondary Area Manager (SAM): Generally Federal program staff who have the responsibility to provide initial approval of application evaluations in ARM. They are able to monitor all review related activities in ARM while the review is in progress, and can receive all final reports.

Program Area Manager (PAM): Generally Federal program staff who have the responsibility to provide final approval of application evaluations in ARM, certifying the review is complete. They are able to monitor all review related activities in ARM while the review is in progress, and can receive all final reports. This role is responsible for marking an application “Approved” as complete.

Review Manager: This role is the individual who will be managing the administrative aspects of the review session.
ARM REVIEWER USER MANUAL

ARM PROCESS MODEL 5 OVERVIEW
Process Model 5, includes a strengthened review criteria and scoring format that provides more flexibility with scoring and non-scoring criteria.

PANEL STRUCTURE
1. Panels Include:
   a. Multiple Reviewers per panel.
   b. One Chairperson per panel.

COMMENTS
1. Must be entered after the criterion is scored.
2. Included by evaluation criterion.

ROLE RESPONSIBILITIES
1. Only Reviewers can score and edit their own comments.
2. Chairpersons can review all scores and comments and return submitted evaluations for updates.
3. Chairpersons compile panel comments, by application, into the Final Summary Report.
4. SAMs provide initial approval in a two tier approval process.
5. PAMs provide final approval in a two tier approval process.

OTHER
1. Reviewers only have visibility to their own scores and comments.
2. Reviewer evaluations can be returned by the Chairperson for editing.
3. Evaluations can be returned by the PAM for editing by the Chairperson or Reviewers.

NAVIGATING ARM
The breadcrumb trail in the blue ribbon at the top of each page in ARM is your main navigation through the system. We recommend you not use your browser back and forward buttons, but instead use the breadcrumb trail.

1. Your current screen will always be displayed in the right most position and will not be an active hyperlink since that is the page that you are on.

2. To go back to any previous screen, simply click the link for the desired screen.
3. If you are unsure what screen you need, you can click back one link at a time until you find the right screen.

SYSTEM TIMEOUT
Per federal regulations, and to provide maximum data security, there is a 30 minute timeout feature in ARM that will log you out after 30 minutes of inactivity. You will receive a 5 minute warning, but to prevent data loss, please save your progress often. Note: Only clicking buttons and hyperlinks is considered activity, and not typing text. Each click of a button or hyperlink will reset the timeout clock.
ARM APPLICATION STATUS DEFINITIONS

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.

Submitted to Chair: 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 Final Summary Report, and Reviewers cannot make any changes to their individual evaluations.

Returned by Chair: 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 SAM: All Reviewers have submitted their evaluations to the Chairperson, and the Chairperson has created the Final Summary report and submitted it to the SAM. The SAM has control of the application to provide initial approval. The panel can no longer make changes to individual evaluations or to the Final Summary Report.

Returned by SAM: The SAM has identified changes in the Final 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 SAM cannot edit any Reviewer scores, nor make edits to any comments.

Submitted to PAM: The SAM has approved the Final Summary Report and has submitted it to the PAM for final approval. The PAM has control of the application to provide final approval. The panel can no longer can make changes to individual evaluations or to the Final Summary Report.

Returned by PAM: The PAM has identified changes in the Final Summary Report that need to be addressed by the panel. The SAM now has control of the application for him/her to return to the Chairperson for him/her to address. A PAM cannot edit any Reviewer scores, nor make edits to any comments.
Approved: The PAM is satisfied with the Final 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.
ACCESSING ARM

You will receive the link to ARM as well as your username prior to your review. Click the link to access the ARM homepage.

LOGGING IN:

1. Navigate to the ARM homepage.

2. Enter your username and password and click the Login button.

3. If you have forgotten your username or password, click the Retrieve Username link or the Lost Password link and follow the instructions. All ARM account information will be sent to the email address with which your account is registered. Please be sure to add no_reply@grantsolutions.gov to your contact list to ensure you receive these emails.
ACCESSING YOUR REVIEW SESSION

After logging in, you will need to access your review session to start scoring and commenting:

1. Clicking the **Login** button takes you to the Agency Home screen that lists all review sessions for which you are serving as Reviewer.

2. Click the appropriate hyperlinked session name. **Note:** If your session has a program support website with relevant information concerning your review, the link will be in the Program Support Site column. Click the **Go to Site** link to open it.

3. You may see the Conflict of Interest (COI) Statement that you must read and accept prior to accessing the session after clicking on your session name. If you do not see this screen you can skip to step 5.

4. Once you have read the COI Statement, check the box indicating that you have read and accept the statement and then click the **Submit** button. You will not be able to advance to the review if you do not accept the COI statement.

5. You will now see the Panel List screen.

6. Click the hyperlinked panel number under the Reviewer role to begin evaluating applications.

7. You will now see the Application List screen, your main dashboard for your review. You will access your evaluations for each application from this screen. This screen is pictured on page 8 below.
STARTING YOUR EVALUATIONS

Once you reach the Applications List screen, your main dashboard, you’ll be ready to begin evaluating applications.

APPLICATION LIST OVERVIEW

The Application List screen provides you with an overview of the progress that you’ve made in evaluating each application. When you are ready to begin evaluating an application, click the hyperlinked application name for the desired application.

The Application List includes the following information:

1. Application Number
2. Application Name
4. Total Score: The total score you have entered for that application.
5. Scores Entered: The number of scores you have entered out of the total number of scoring criteria.
6. Comments Added: The total number of comments you have added to that application, across all criteria.
7. Application File: Click the green Open File link to open the application file in a new tab or window. (This is optional and may not be available in all reviews.)
THE EVALUATION SCREEN

Clicking a hyperlinked application name takes you to the Evaluation screen for that application. Here you will see the list of all review criteria along with the score you have awarded for each. From the Evaluation screen you can access full descriptions of the criteria, enter and edit scores, and enter, edit, and delete comments. If your review session includes non-scoring criteria, they will be listed on this screen along with the scoring criteria. The scoring and non-scoring criteria may be separated into separate lists, as seen in the first image below, or may be mixed together in one list, as seen in the second image below. Entering scores (and responses to non-scoring criteria) will be the same for all score types.
ACCESSING REVIEW CRITERIA DESCRIPTIONS

If the review criteria were setup with detailed descriptions, you may view them by following the steps below:

1. To view the full descriptions of the review criteria from the Evaluation screen, click the Criteria column header link.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Score</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Technical Approach (25 points)</td>
<td>25</td>
<td>Comment</td>
</tr>
<tr>
<td>1 Budget (25 points)</td>
<td>25</td>
<td>Comment</td>
</tr>
<tr>
<td>2 What is their budget request? (0 points)</td>
<td></td>
<td>Comment</td>
</tr>
<tr>
<td>2 Is the organization prepared to do the project? (45 points)</td>
<td>Yes</td>
<td>Comment</td>
</tr>
<tr>
<td>3 What percent of sites are operational? (0 points)</td>
<td>100%</td>
<td>Comment</td>
</tr>
<tr>
<td>3 Was the description of need detailed and complete? (0 points)</td>
<td>Mostly</td>
<td>Comment</td>
</tr>
<tr>
<td>4 Please provide an overall assessment of the application. (0 points)</td>
<td>Comment Only</td>
<td>Comment</td>
</tr>
</tbody>
</table>

   Actual Score: 95

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

3. You can keep that tab or window open in the background, for easy reference, as you score and comment on each criterion.
ADDITION SCORES AND COMMENTS
The main task you will have in evaluating applications will be adding scores and comments. There are two ways to enter scores and comments, entering scores and comments together or entering them separately. No matter the option you choose, scores must also be entered before comments can be added.

ENTERING SCORES AND COMMENTS TOGETHER
Before a score is entered, the Score column on the Evaluation screen will show double dash links (‐‐). To enter scores by criterion, follow the steps below for each criterion:

1. On the Evaluation screen, click the double dash (‐‐) next in the Score column next to the criterion you are evaluating.

2. You will now see the Add Score screen.

SCORING NOTES:
As a Reviewer you can only see your own scores and comments.

You must enter a score before you can enter a comment.

ARM automatically totals your overall evaluation score for you as you enter your individual criterion scores.

You can edit all scores until you submit your evaluation to the Chairperson.

You cannot submit your evaluation to the Chairperson unless you have entered scores for all scoring criteria.

Scores and Comments
3. Click the dropdown menu and select your desired score.

4. Click the **Submit** button to add the score to your evaluation, or click the **Return** button to return to the previous screen without adding a score.

5. To edit scores, repeat steps 1-4. **Note:** Once you have entered a score the double dash link (--) will be replaced by the score, as mentioned in step 5. Click the score in the Score column to edit.

6. Once you submit your score, the comment section below will become active.
7. Click the Category dropdown menu to choose whether your comment is a Strength, a Weakness or a General comment.

8. Type in the page number or page identifying information. **Note**: Follow the Reviewer instructions you receive from the grant Review Managers for completing this field with the appropriate page information.

9. Enter your comment in the large textbox. **Note**: You have a 4,000 character limit per comment.

10. Click the **Spell Check** button to check for spelling errors in your comment.
11. Click the **Submit** button to finalize your comment and add it to your evaluation. The three fields will clear and your comment will now appear below the large textbox.

![Comment Form](image)

**Note:** You can also click the **Save** button to save your draft comment while you are still entering text. To retrieve a saved comment to finalize it, click the **Retrieve the Last Comment** link. The use of the **Save** function is only recommended if you are typing an extremely long comment.

12. To continue adding additional comments for the criterion, repeat steps 7-11.
13. To edit comments, click the **Edit** link next to the comment number and repeat steps 7-11.
14. To delete comments, click the **Delete** link next to the desired comment number. **Note:** Deleting a comment will permanently remove it from your evaluation.

![Comments](image)
**ARM REVIEWER USER MANUAL**

**15.** Finally, click the **Return** button in the scoring section of the screen or the **Evaluation** link in the breadcrumb trail to return to the Evaluation screen. The Score column for that criterion, on the Evaluation screen, will now display the score you submitted.

![1 Technical Approach](image)

Please enter your score to be able to enter a comment.

**16.** Follow the steps outlined above to continue entering scores and comments for the remaining criteria.

**ENTERING SCORES AND COMMENTS SEPARATELY**

You also have the option to enter all scores on one comprehensive scoring screen, followed by entering comments by criterion.

**ENTERING SCORES**

To enter scores separately, follow the steps below:

1. To access the full Add Scores screen, click the **Score** column header link on the Evaluation screen.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Score</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Technical Approach (25 points)</td>
<td></td>
<td>Comment</td>
</tr>
<tr>
<td>1 Budget (25 points)</td>
<td></td>
<td>Comment</td>
</tr>
<tr>
<td>2 What is their budget request? (0 points)</td>
<td>2</td>
<td>Comment</td>
</tr>
<tr>
<td>2 Is the organization prepared to do the project? (45 points)</td>
<td>2</td>
<td>Comment</td>
</tr>
<tr>
<td>3 What percent of sites are operational? (0 points)</td>
<td>2%</td>
<td>Comment</td>
</tr>
<tr>
<td>3 Was the description of need detailed and complete? (0 points)</td>
<td>2</td>
<td>Comment</td>
</tr>
<tr>
<td>4 Please provide an overall assessment of the application. (0 points)</td>
<td>Comment Only</td>
<td>Comment</td>
</tr>
</tbody>
</table>

**Actual Score:**

2. You will now see the full Add Scores screen that lists all review criteria.

**Note:** You can view full descriptions of the criteria on this page:

a. Click the **Show Description** link next to an individual criterion to view the description of that criterion.

b. Click the **Show All Descriptions** link next to the **Criteria** column header to view all criteria descriptions.
3. Click the dropdown menus next to the criteria and select your desired scores for each, and enter any responses for any non-scoring criteria.

4. Click the **Submit** button to add the scores to your evaluation.

5. The **Score** column will now display the scores you submitted.

6. To edit scores, repeat steps 1-6.

**ENTERING COMMENTS**

After entering all of your scores on the full Add Scores screen follow the steps below to enter your comments by criterion:

1. Once you submit a score for any of the criteria, the word **Comment** next to it will become an active hyperlink.

2. Click the **Comment** link next to the desired criterion and follow steps and follow steps 7-16 in the Entering Scores and Comments Together section above.
NON-SCORING CRITERIA

Your review session may include non-scoring criteria. Non-scoring criteria may be listed separately from the scoring criteria, or may be listed in a combined criteria list. Unless the non-scoring criteria only requires a comment, you will need to enter a response.

The process for entering responses and comments for non-scoring criteria is exactly the same as for entering scores and comments for scoring criteria. Follow the instructions above for scoring criteria. If a non-scoring criteria only requires a comment and no other response, then Comment link next to it will be active immediately, and all you need to do is click the Comment link and follow the instructions above for entering comments. Responses to non-scoring criteria do not affect the overall score, even when mixed in one list.
VIEWING SCORES AND COMMENTS

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

HOW TO VIEW SCORES AND COMMENTS

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

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

3. Review the score report to ensure that you have added all required responses.

4. Close the score report when you are finished.
5. Next click the View Comments button to view an HTML list of all comments you have added, in a new tab or window. **Note:** Comments are listed by criterion, separated in to Strength comments first followed by Weakness, with General comments last.

6. Close the comments list when you are finished.
**SUBMITTING EVALUATIONS**

When you are finished entering all necessary scores and comments, you will be ready to submit your evaluation to the Chairperson.

**HOW TO SUBMIT EVALUATIONS TO THE CHAIRPERSON**

1. On the Evaluation screen, click the **Submit to Chair** button.

2. You will see a confirmation box pop up on your screen.

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

4. The status of your evaluation will then change to “Submitted to Chair.”

**SUBMITTING TO CHAIR NOTES:**

The Submit to Chair button will be inactive until you have entered scores for all scoring criteria.

Once you submit an evaluation to the chairperson, you will no longer be able to edit your scores and comments unless the evaluation is returned to you by the Chairperson.

You will still be able to view your scores and comments even after the evaluation is in “Submitted to Chair” status.
RETURNED EVALUATIONS

At any point after you submit evaluations to the Chairperson, they Chairperson may return them to you with suggested edits and updates. If any evaluations are returned to you, you will need to review the Return History, make any necessary changes, and resubmit your evaluation to the Chairperson.

CHECKING THE RETURN HISTORY

1. When a Chairperson returns an evaluation to you, the status of that evaluation will change to “Returned by Chair.”
2. On either the Application List screen or the Evaluation screen, click the Returned by Chair status link.

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

4. After reading and considering the Chairperson’s feedback, you’ll be ready to make all necessary changes. Note: To protect the transparency of the process the feedback provided by the
Chairperson or PAM is visible to all reviewers assigned to the application. You may have to identify which feedback is relevant to your evaluation. Clicking on this status link at any time, regardless of the status, will display the entire Return History of the application.

**EDITING EVALUATIONS AND RESUBMITTING TO THE CHAIRPERSON**

1. Follow the instructions in the Adding Scores section above to enter/edit any scores and comments.
2. Once all necessary changes are made, follow the instructions in the Submitting Evaluations section to resubmit to the Chairperson.
COMPLETING THE REVIEW

Once you submit your evaluations to the Chairperson, the Chairperson and then the PAM will be responsible for completing the final steps. After the Chairperson submits the Final Summary Report to the PAM and the PAM is satisfied with it, they will approve that evaluation. At that point the status of that application will change to “Approved,” and your role as Reviewer for that application will be complete. Your only remaining task, IF REQUIRED, will be to print, sign, and return your PDF Score Reports.

PRINTING SCORE REPORTS

Follow the Reviewer instructions you receive from your Review Manager and from the federal program staff. If you are required to submit printed and signed PDF versions of your Score Reports, follow the instructions below:

1. Your PDF Score Report for an application will only be available after that application is in “Approved” status.

2. From the Evaluation screen, click the View Score Report button to open the HTML version in a new tab or window.
3. The yellow highlighted PDF Report link will now be active.

4. Click the PDF Report link to open the PDF version of the Score Report. **Note:** You must print and sign only the PDF version because only it will have the signature and date lines.

5. Once the PDF Score Report opens, print, sign and date it.

6. Repeat steps 1-5 for each application you evaluated.

7. Mail in all signed Score Reports with all other required closeout documentation.

8. This will complete your review for the grant program.
MANAGING YOUR ACCOUNT

You have the ability to personalize and update your usernames and passwords and manage your accounts accordingly. To manage your account, click the My Account link in the upper right corner of the screen.

UPDATE ACCOUNT INFORMATION

You can update all account information as necessary. This includes First Name, Last Name, City, Zip Code, and State.

1. On the Account screen, click the Update Account Information button.

2. Enter the updated information in the appropriate field, and click the Submit button.
UPDATE EMAIL
You also have the option to update the email address associated with your account. If you update your email address, all communication from the ARM system will be sent to the new email address. **Note:** For returning ARM reviewers, please be sure that you provide the currently registered email address to the Review Manager when contacted about acting as a reviewer for a new program.

1. On the Account screen, click the **Update Email** button.

   ![Update Email Button](image)

2. Enter your password, your new email address, confirm the new email address, and finally click the **Submit** button.

   ![Password Change Form](image)

UPDATE PASSWORD
You can update your password at any time.

1. On the Account screen, click the **Update Password** button.
2. First enter your old password, then (following the guidelines) enter and confirm your new password and click the **Submit** button.

![Change Password](image)

**Update Login Name**

You have the option to update your username at any time. **Note:** If the username you select is already assigned, you will need to enter an alternate username.

1. On the Account screen, click the **Update Login Name** button.

![Update Account Information](image)

2. Enter your password, your new username, confirm the new username, and finally click the **Submit** button.

![Change Login Name](image)

**Thank You**

This concludes the Reviewer user manual for the Application Review Module. Thank you for using ARM.