



**PCORI Online: Merit Reviewer
User Guide for Completing
Online Reviews**

Patient-Centered Outcomes Research Institute

Complete Online Merit Reviews

After you have completed all COI & Expertise Forms, you will be notified whether you have been assigned Applications to review. In both the preliminary Online Review and the In-Person Review phases, Reviewers access their assigned Applications through the Reviewer Dashboard in PCORI Online. In this online portal, Reviewers provide critiques and score Applications based on PCORI's Merit Review criteria. They also evaluate Human Subjects Protections and adherence to the [PCORI Methodology Standards](#).

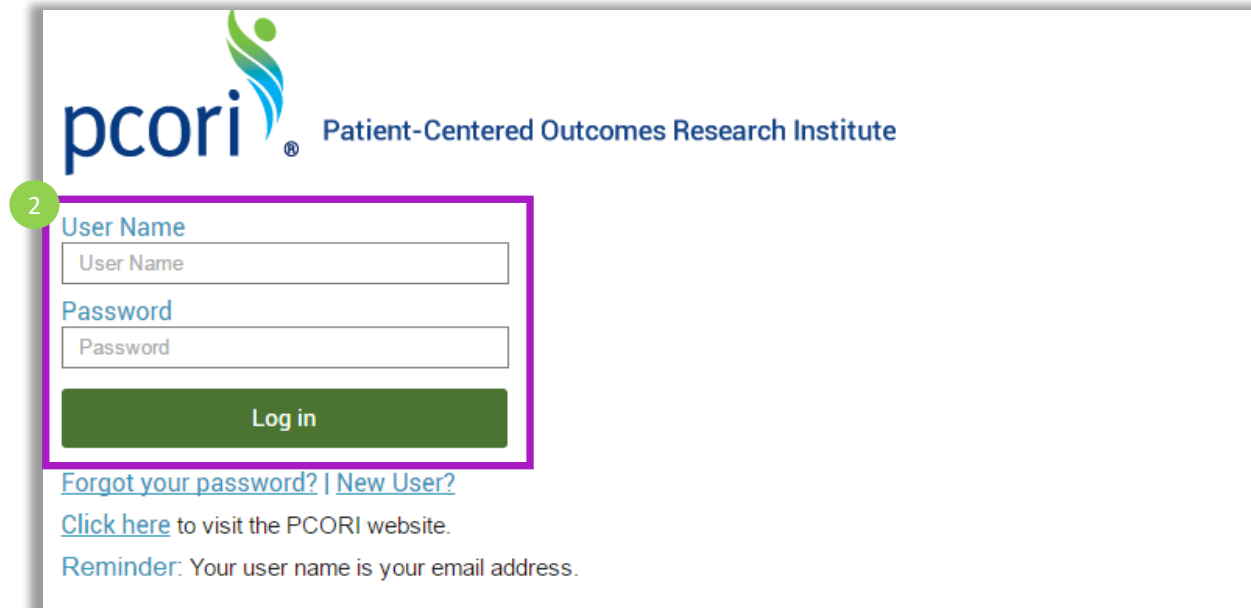
This section provides guidance on how to:

- Navigate the Reviewer Dashboard
- Complete Online Reviews

Navigate the Reviewer Dashboard

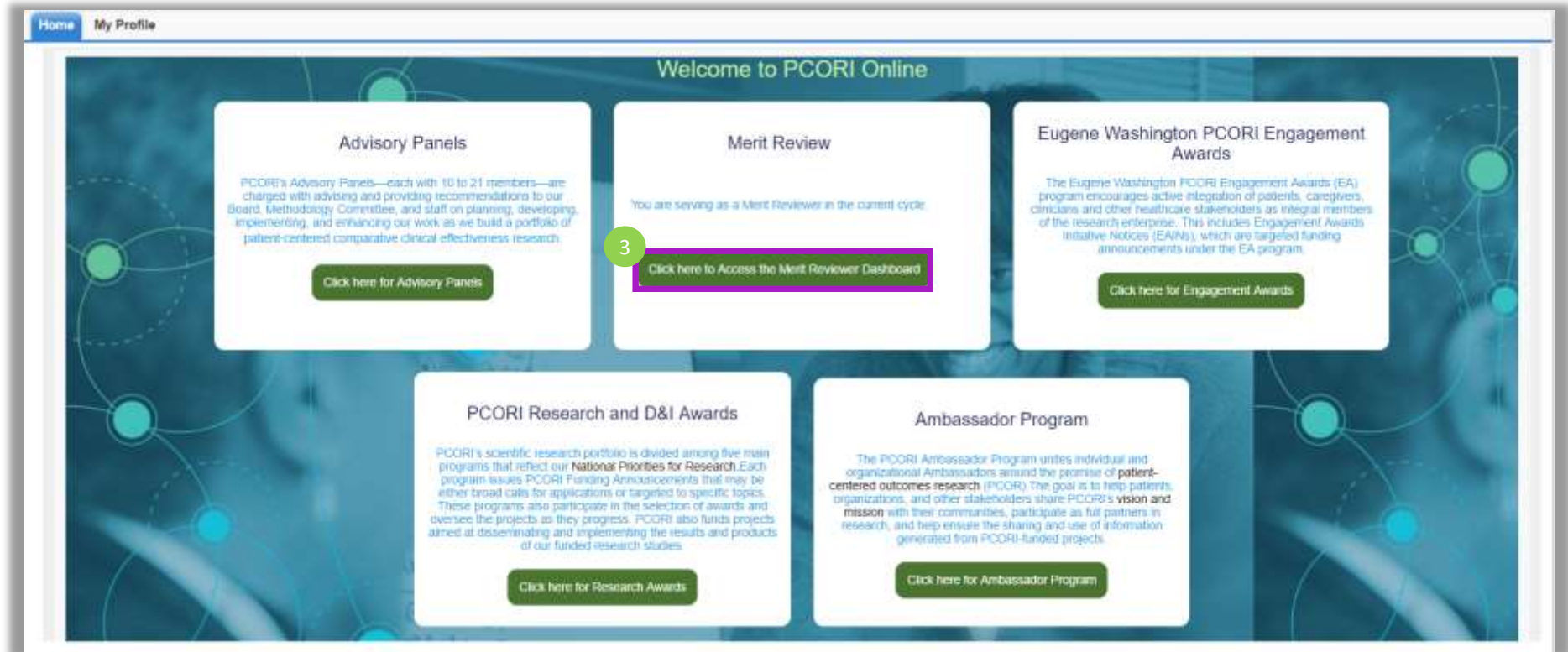
If you are assigned Applications to review, those Applications will appear in the Reviewer Dashboard page through PCORI Online.

1. Navigate to the PCORI Online home page (<https://pcori.force.com/engagement>).
2. Enter your User Name and Password, and click '**Log in.**'

A screenshot of the PCORI Online login page. At the top left is the PCORI logo, and to its right is the text "Patient-Centered Outcomes Research Institute". Below the logo, a green circle with the number "2" is positioned to the left of a purple rectangular box that highlights the login fields. Inside this box are three elements: a "User Name" label above a text input field containing the placeholder "User Name"; a "Password" label above a text input field containing the placeholder "Password"; and a green "Log in" button. Below the purple box, there are two links: "[Forgot your password? | New User?](#)" and "[Click here](#) to visit the PCORI website." At the bottom of the form area, a reminder states: "Reminder: Your user name is your email address."

Note: If you have forgotten your password, navigate to the [Appendix](#) for further instructions.

- Once logged in, you will be directed to the PCORI Online home page. All Merit Review tasks will be completed in this system. To access the Merit Review Dashboard click the **Merit Review** tile. The text of the Merit Review button will reflect the current outstanding task for the Merit Reviewer. At this step, the button text is '**Click here to Access the Merit Reviewer Dashboard.**'



Note: To return to this page at any point, click the **Home** tab in the top left corner.

4. Welcome to the Reviewer Dashboard! There are 4 tabs you will use to navigate this page:
 - a. **Reviewer Dashboard:** This tab will display any Applications that have been assigned to you. During COI and Expertise indication, no applications will appear in the Reviewer Dashboard.
 - b. **COI & Expertise:** This tab will display any required COI & Expertise forms that must be completed.
 - c. **My Profile:** This tab can be used to update your profile information.
 - d. **Application Reviews Downloads:** This tab can be used to download copies of the Applications you are assigned to review and additional resource documentation.

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The screenshot shows the 'Reviewer Dashboard' tab selected. The dashboard includes a sidebar with 'Reviews' and a main content area with 'Open Reviews' and 'Closed Reviews' buttons. A table lists five applications, all with a status of 'Ready to Review'. A callout box states: 'Once you have completed all COI & Expertise Forms, Applications may then be assigned to you. If so, they will appear on the Reviewer Dashboard'.

Edit	View	Application	Deadline	Record Type ID	Status	In-Person Discussion Order
		All	All	All	All	All
		Building Capacity in the Patient-Centered Research Community	3/31/2017 6:28 PM	Online Review - AD	Ready to Review	-
		Developing Community Partnerships for Patient-Centered Care	3/31/2017 6:28 PM	Online Review - AD	Ready to Review	-
		Study for Mind-Body Therapies for People with MS	3/31/2017 6:28 PM	Online Review - AD	Ready to Review	-
		Enhancing Health Through Patient and Family Partnership	3/31/2017 6:28 PM	Online Review - AD	Ready to Review	-
		Identifying Innovative Approaches to Patient Engagement	3/31/2017 6:28 PM	Online Review - AD	Ready to Review	-

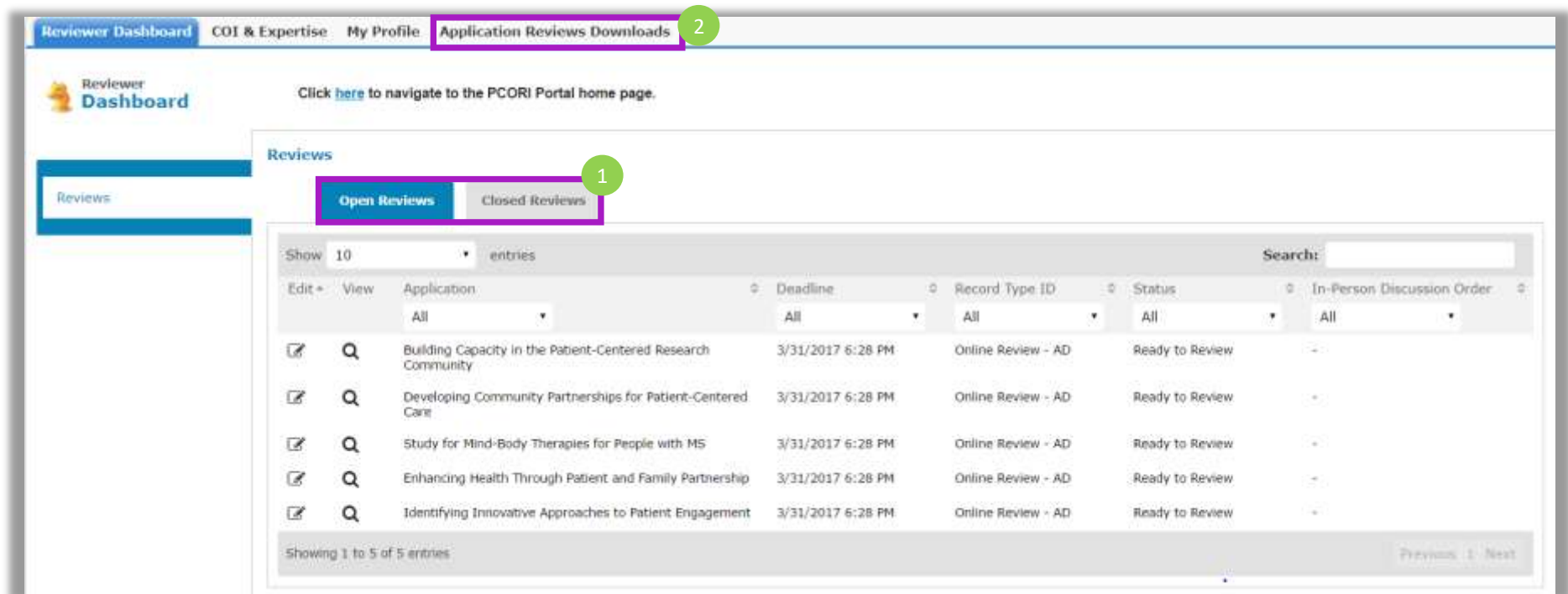
Showing 1 to 5 of 5 entries

Previous 1 Next

Complete Online Reviews

In the Reviewer Dashboard tab, once you select an Application to review, you will be able to view the Application, access a PDF version of the full Application, and complete your reviews by the stated deadline.

1. From the Reviewer Dashboard:
 - a. Applications available for review are located under the '**Open Reviews**' tab.
 - b. Applications that are no longer available for review (for example, because they have been submitted to the MRO or the review deadline has passed) are located under the '**Closed Reviews**' tab.
2. Click on the **Application Reviews Downloads** tab.



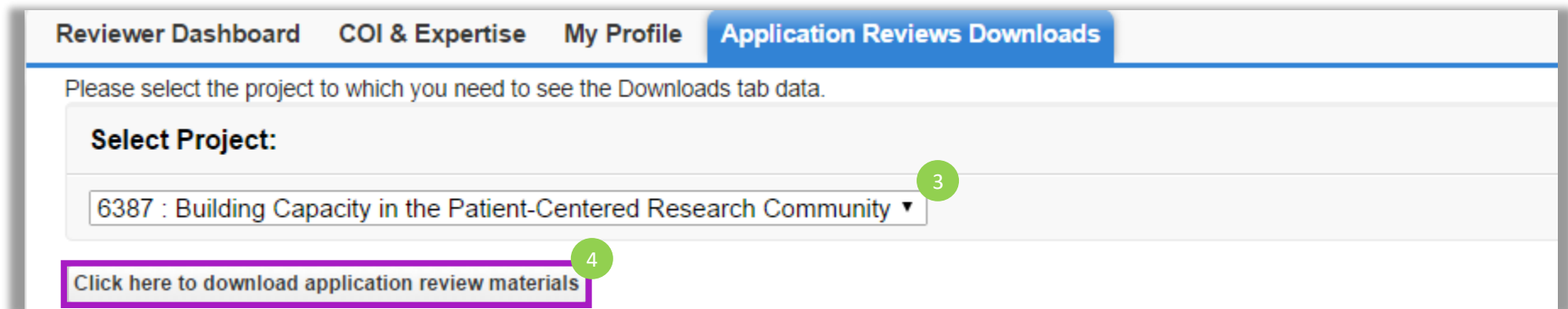
The screenshot shows the PCORI Reviewer Dashboard. The top navigation bar includes 'Reviewer Dashboard', 'COI & Expertise', 'My Profile', and 'Application Reviews Downloads' (highlighted with a green circle and the number 2). Below the navigation bar, there is a 'Reviewer Dashboard' header with a link to the PCORI Portal home page. The main content area is titled 'Reviews' and contains two tabs: 'Open Reviews' (highlighted with a green circle and the number 1) and 'Closed Reviews'. The 'Open Reviews' tab displays a table of applications available for review. The table has columns for 'Edit', 'View', 'Application', 'Deadline', 'Record Type ID', 'Status', and 'In-Person Discussion Order'. There are five entries listed, all with a deadline of 3/31/2017 6:28 PM and a status of 'Ready to Review'. The first entry is 'Building Capacity in the Patient-Centered Research Community'. The second entry is 'Developing Community Partnerships for Patient-Centered Care'. The third entry is 'Study for Mind-Body Therapies for People with MS'. The fourth entry is 'Enhancing Health Through Patient and Family Partnership'. The fifth entry is 'Identifying Innovative Approaches to Patient Engagement'. The table shows 'Showing 1 to 5 of 5 entries' and has 'Previous' and 'Next' links at the bottom right.

Edit	View	Application	Deadline	Record Type ID	Status	In-Person Discussion Order
		Building Capacity in the Patient-Centered Research Community	3/31/2017 6:28 PM	Online Review - AD	Ready to Review	-
		Developing Community Partnerships for Patient-Centered Care	3/31/2017 6:28 PM	Online Review - AD	Ready to Review	-
		Study for Mind-Body Therapies for People with MS	3/31/2017 6:28 PM	Online Review - AD	Ready to Review	-
		Enhancing Health Through Patient and Family Partnership	3/31/2017 6:28 PM	Online Review - AD	Ready to Review	-
		Identifying Innovative Approaches to Patient Engagement	3/31/2017 6:28 PM	Online Review - AD	Ready to Review	-

Showing 1 to 5 of 5 entries

Previous 1 Next

3. Select the Application from the list to download the application materials.
4. Click the button '**Click here to download application review materials.**'



Reviewer Dashboard COI & Expertise My Profile **Application Reviews Downloads**

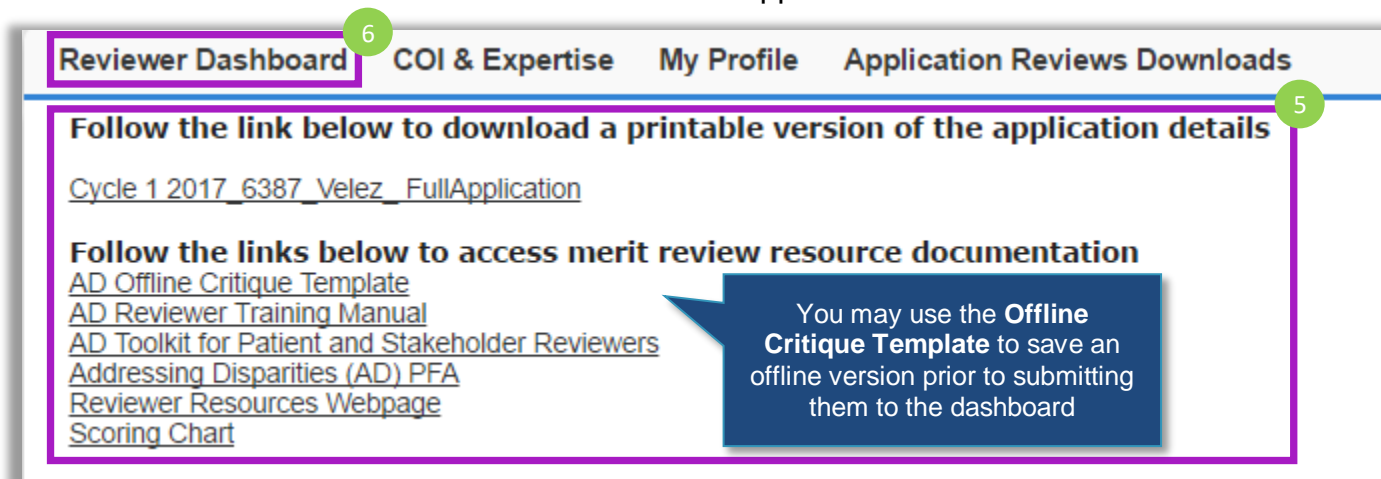
Please select the project to which you need to see the Downloads tab data.

Select Project:

6387 : Building Capacity in the Patient-Centered Research Community ▼

Click here to download application review materials

5. Navigate to the links to access a PDF version of the Application, as well as **Merit Review Resource Documentation**, including the Offline Critique Template, Scoring Chart, and Merit Reviewer Training Manual.
6. Click on the **Reviewer Dashboard** tab to review the Application.



Reviewer Dashboard COI & Expertise My Profile Application Reviews Downloads

Follow the link below to download a printable version of the application details

[Cycle 1 2017_6387_Velez_FullApplication](#)

Follow the links below to access merit review resource documentation











[AD Offline Critique Template](#)
[AD Reviewer Training Manual](#)
[AD Toolkit for Patient and Stakeholder Reviewers](#)
[Addressing Disparities \(AD\) PFA](#)
[Reviewer Resources Webpage](#)
[Scoring Chart](#)

You may use the **Offline Critique Template** to save an offline version prior to submitting them to the dashboard

Note: Additional resources are available on the [Reviewer Resources Webpage](#). We highly recommend that you open the Application PDF link as instructed in Step 5 so that you have the Application readily available while you complete your review.

7. Click the **Edit** icon next to the Application record to review the Application.


The screenshot shows the 'Reviewer Dashboard' with a navigation bar at the top containing 'Reviewer Dashboard', 'COI & Expertise', 'My Profile', and 'Application Reviews Downloads'. Below the navigation bar, there's a 'Reviewer Dashboard' section with a link to the PCORI Portal home page. The main content area is titled 'Reviews' and has two tabs: 'Open Reviews' (selected) and 'Closed Reviews'. A table lists 5 applications, all with a status of 'Ready to Review'. The first application, 'Building Capacity in the Patient-Centered Research Community', is highlighted with a green circle and the number 7, indicating the 'Edit' icon (pencil) next to it.

Edit	View	Application	Deadline	Record Type ID	Status	In-Person Discussion Order
		Building Capacity in the Patient-Centered Research Community	3/31/2017 6:28 PM	Online Review - AD	Ready to Review	-
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Showing 1 to 5 of 5 entries

Previous 1 Next

8. In addition to downloading a PDF copy of the full Application (see previous steps 3-5), you may also view the Application by clicking on the **Application Details** tab.
9. Click the **Online Review** tab, where you will enter critiques and scores for the Application.


Online Review - AD
ER-2794

8

Application Details

9

Online Review

10

Strength and weakness modifiers:
Definitions of strength modifiers:

- Minor Strength: An attribute that could lead to improvements in healthcare and/or outcomes
- Moderate Strength: An attribute that would probably lead to improvements in healthcare and/or outcomes
- Major Strength: An attribute that is likely to lead to improvements in healthcare and/or outcomes

Definitions of weakness modifiers:

- Minor Weakness: An easily addressable weakness that does not substantially lessen the impact of the study's results on healthcare and/or outcomes
- Moderate Weakness: A weakness that would lessen impact of the study's results on healthcare and/or outcomes
- Major Weakness: A weakness that would seriously limit impact of the study's results on healthcare and/or outcomes

1	2	3	4	5	6	7	8	9
Essentially no weaknesses	Only minor, very fixable weaknesses	A few minor weaknesses	Many minor weaknesses	Some strengths and at least one moderate weakness	Some strengths and several moderate weaknesses	A few strengths and at least one major weakness	Very few strengths and a few major weaknesses	Essentially no strengths and many major weaknesses

Criterion 1: Potential for the study to fill critical gaps in evidence (Not required for Patient and Stakeholder Reviewers)
The proposal addresses the following questions:

- Does the application convincingly describe the clinical burden?
- Does the application identify a critical gap in current knowledge as noted in systematic reviews, guideline development efforts, or previous research prioritizations?
- Does the application identify a critical gap in current knowledge evidenced by inconsistency in clinical practice and decision making?

10. Carefully read the definitions of Strength Modifiers and Weakness Modifiers.
Note: Definitions for Strength and Weakness Modifiers are PFA dependent and may differ from those shown the image below.

11. Scroll down to view, evaluate, and score each **Criterion**.
12. Enter **Strengths** and **Weaknesses** as bulleted lists for each Criterion. Please use full sentences.
13. Use the drop-down menu to select the **Score** for each Criterion. Score ranges from “1” (best score) to “9” (poorest score).

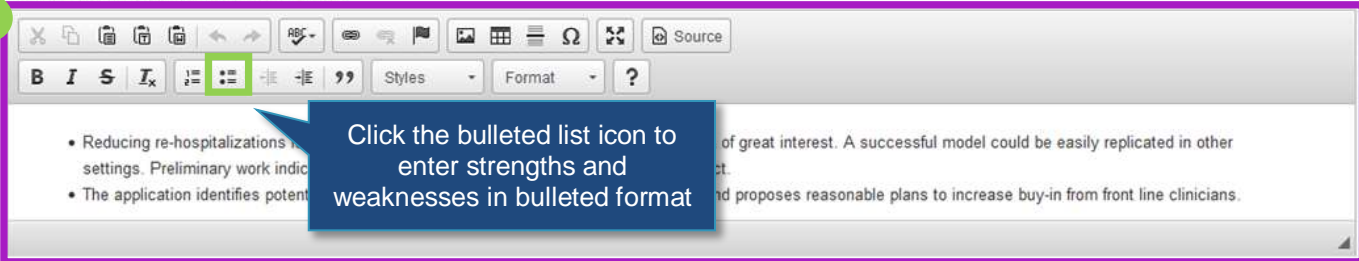
Criterion 2: Potential for the study findings to be adopted into clinical practice and improve delivery of care (All reviewers)

The application should describe how evidence that is generated from this study could be adopted into clinical practice and delivery of care by others. The application should address the following:

11.
 - Does the application identify who will make the decision (i.e., the decision maker) or use (i.e., the end-user) the study findings (not the intervention) produced by this study, such as local and national stakeholders?
 - Does the application identify potential end-users of study findings, such as local and national stakeholders, and describe strategies to engage these end-users?
 - Does the application provide information that supports a demand for this kind of a study from end-users?
 - Would research findings from this study have the potential to inform decision making for key stakeholders (provide example)? How likely is it that positive findings could be reproduced by others, resulting in improvements in practice and patient outcomes? Identify the potential barriers that could hinder adoption of the intervention by others.
 - Does the application describe a plan for how study findings will be disseminated beyond publication in peer review journals and national conferences?

Criterion 2: Strengths
Please enter strengths in a bulleted format

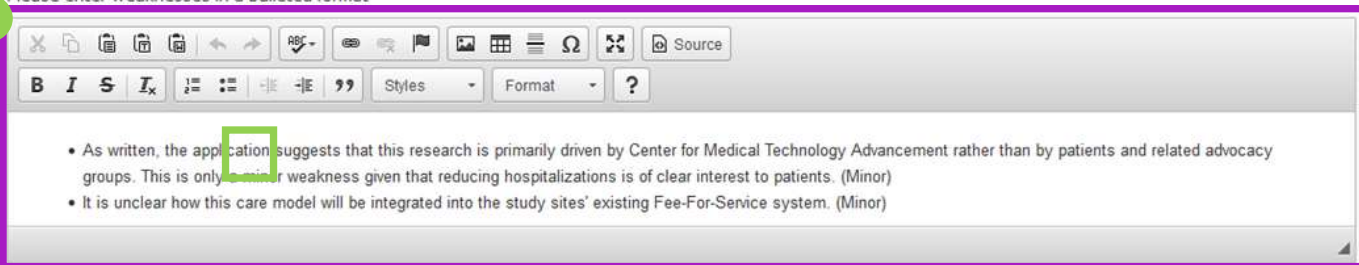
12.



Click the bulleted list icon to enter strengths and weaknesses in bulleted format

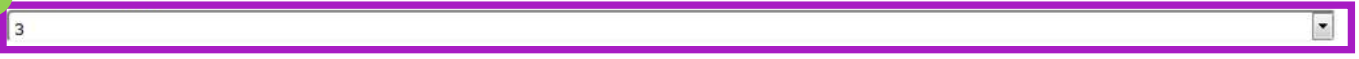
Criterion 2: Weaknesses
Please enter weaknesses in a bulleted format

12.



Criterion 2: Score

13.



- Protection of Human Subjects: (Not required for Patient and Stakeholder Reviewers)**

Does the application have acceptable risks and/or adequate protections for human subjects?

No

Please provide comments related to human subjects protections, if any.

Overall Score

3

Please Provide Your Overall Comments

The proposed study seeks to redesign care for a high-risk, elderly (Medicare) population that presumably has a very high disease burden. Though the proposed study design and evaluation is not strongly patient-centered, the research addresses an issue that is of clear concern to patients. By concentrating patients at high risk of hospitalization, physicians will be able to focus their attention on those with the highest risk. Preliminary data from pilot work conducted by the study team is promising; the proposed study will address limitations to the pilot work—specifically the small sample size, short duration, and limited patient-centered outcomes. Given the increasing incentives for hospitals to reduce re-hospitalization rates, positive study findings could lead to new approaches that would be of interest to payers.

Save Cancel

11

19. When you have completed your Review and are ready to submit, click **'Review & Submit'** at the top of the page. Once you click this button, you will be taken to a read-only page of your Review.

Reviewer Dashboard
COI & Expertise
My Profile
Application Reviews Downloads

Online Review - AD
ER-2966

Application Details

Online Review

19

Review/Submit

Strength and weakness modifiers:

Definitions of strength and weakness modifiers:

- Major Strength: An attribute that is likely to lead to improvements in healthcare and/or outcomes
- Moderate Strength: An attribute that would probably lead to improvements in healthcare and/or outcomes
- Minor Strength: An attribute that could lead to improvements in healthcare and/or outcomes
- Minor Weakness: An easily addressable weakness that does not substantially lessen the impact of the study's results on healthcare and/or outcomes
- Moderate Weakness: A weakness that would lessen the impact of the study's results on healthcare and/or outcomes
- Major Weakness: A weakness that would seriously limit the impact of the study's results on healthcare and/or outcomes

1	2	3	4	5	6	7	8	9
Essentially no weaknesses	Only minor, very fixable weaknesses	A few minor weaknesses	Many minor weaknesses	Some strengths and at least one moderate weakness	Some strengths and several moderate weaknesses	A few strengths and at least one major weakness	Very few strengths and a few major weaknesses	Essentially no strengths and many major weaknesses


Criterion 1: Potential for the study to fill critical gaps in evidence (Not required for Patient and Stakeholder Reviewers)

The proposal addresses the following questions:

- Does the application convincingly describe the clinical burden?
- Does the application identify a critical gap in current knowledge as noted in systematic reviews, guideline development efforts, or previous research prioritizations?
- Does the application identify a critical gap in current knowledge, evidenced by inconsistency in clinical practice and decision making?
- Would research findings from the study have the potential to fill these evidence gaps?

20. Prior to submitting the Review, you can view a read-only summary of your Critiques and Scores.

- If you would like to make any updates, click '**Back to Record.**'
- To print a copy of the Review, click '**Print.**'
- To submit, click the '**Submit**' button.



Online Review - AD
ER-2794

20

Back to Record
Print
Submit

Online Review

Strength and weakness modifiers:

Criterion 2: Potential for the study findings to be adopted into clinical practice and improve delivery of care (All reviewers)

Criterion 2: Strengths

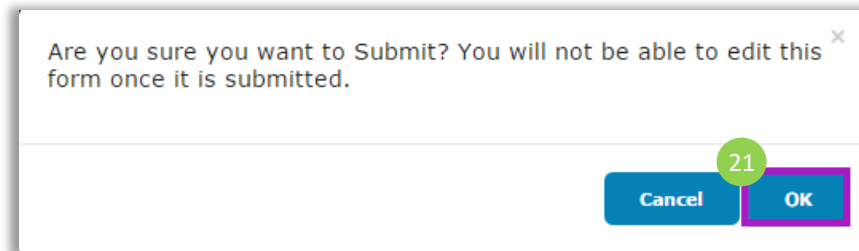
- Reducing re-hospitalizations is a major concern to both payers and patients and an area of great interest. A successful model could be easily replicated in other settings. Preliminary work indicates that there is an excellent chance of seeing an impact.
- The application identifies potential barriers to adoption of the proposed decision toolkit and proposes reasonable plans to increase buy-in from front line clinicians.
- As written, the application suggests that this research is primarily driven by Center for Medical Technology Advancement rather than by patients and related advocacy groups. This is only a minor weakness given that reducing hospitalizations is of clear interest to patients. (Minor)
- It is unclear how this care model will be integrated into the study sites' existing Fee-For-Service system. (Minor)

Criterion 2: Weaknesses

Criterion 2: Score 3

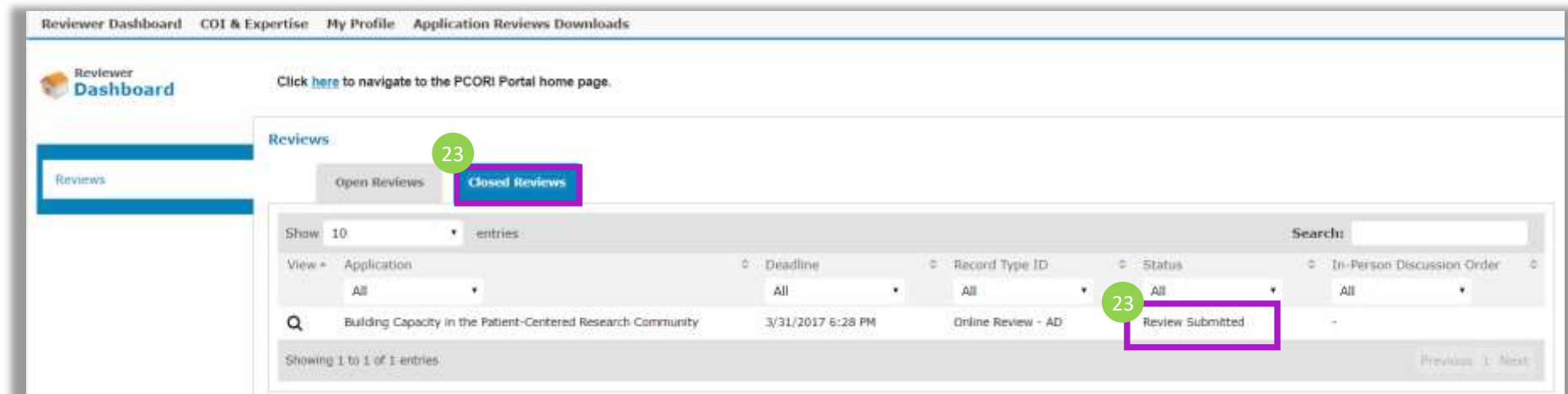
Note: Your MRO will receive an email notification once you submit your Review.

21. Click '**OK**' to finalize the submission. The page will then refresh, and return you to the initial **Reviewer Dashboard** page.



22. Repeat steps 1-21 to critique and score all open Applications on your **Reviewer Dashboard**.

23. As you complete and submit the Reviews, they will move from your list of **Open Reviews** to your list of **Closed Reviews** with status '**Review Submitted**.' When no Reviews remain on the Open Reviews list, you have completed all Reviews.



Editing Your Critique:

24. Merit Review Officers read all written critiques and may provide feedback via email on your written critiques. If feedback has been provided, the critique will reappear in the Open Reviews tab. You can then make necessary edits to your critique and resubmit, at which point the critique will move to the Closed Reviews tab again. Complete this process for all critiques that require editing until no Reviews remain in the Open Reviews tab.

Appendix

A.1 Retrieve a Forgotten Password

1. Navigate to PCORI Online (<https://pcori.force.com/engagement>).
2. If you do not know or have forgotten your PCORI Online password, click '**Forgot your password?**' to retrieve it.
3. On the following screen, enter your username (i.e. your email address), and click '**Reset Password.**'
4. After submission, you will receive a system-generated email with instructions on how to reset your password.



The image shows two screenshots of the PCORI Online interface. The top screenshot shows the login page with fields for 'User Name' and 'Password', a 'Log in' button, and a link for 'Forgot your password?'. A green circle with the number '2' is next to the 'Forgot your password?' link. The bottom screenshot shows the password reset page with a 'Username' field and a 'Reset Password' button. A green circle with the number '3' is next to the 'Reset Password' button. A callout line connects the 'Forgot your password?' link in the top screenshot to the 'Reset Password' button in the bottom screenshot.