PCORI Online: Guidance for Completing Online Reviews
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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 written 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:

1.1 Navigate the Reviewer Dashboard
1.2 Complete Online Reviews
1.1 Navigate the Reviewer Dashboard

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

2. Enter your User Name and Password, and click ‘Log in.’

Note: If you have forgotten your password, navigate to the Appendix for further instructions.
3. 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 'Access the Merit Review 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 six 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. **Indicate COI & Expertise**: This tab will display any required COI & Expertise forms that must be completed.

   c. **Download Combined Applications/Critiques**: This tab can be used to download copies of the Application for review and additional resource documentation.

   d. **General Resources for All Reviewers**: This tab can be used to access a variety of resources, including PCORI Online User Guides and general guidance.

   e. **PFA-Specific Resources**: This tab can be used to access panel-specific resources, including Offline Critique Templates and Scoring Charts.

   f. **My Profile**: This tab can be used to update your profile information.

   If applications have been assigned to you, they will appear on the Reviewer Dashboard.
1.2 Complete Online Reviews
From the Reviewer Dashboard tab, you will be able to select an Application to review, 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. Before beginning your first Application review, click the **PFA-Specific Resources** tab to download panel-specific reviewer resources, such as the Reviewer Training Manual, Offline Critique Template, Scoring Chart, and other helpful guidance materials.
3. Click the **Download Combined Applications/Critiques** tab to download the Application Review materials for Applications you have been assigned.

4. Select an Application from the drop-down menu to download the materials for that Application.

5. Click the button **‘Click here to download’**.

6. The page will refresh. Click the link to access a PDF version of the Application.

7. Once you have downloaded the applicable materials and are ready to begin your review, click the **Reviewer Dashboard** tab to review the Application.

**Note:** We highly recommend that you download a PDF copy of the full Application, so that you have the Application readily available as you complete your review. Other important documents, such as the Offline Critique Template, can be downloaded from the **PFA-Specific Resources** tab.
8. To begin your review, click the **Edit** icon next to the Application record.

**Note**: We highly recommend that you first complete your critique in the Offline Critique Template and cut/paste into PCORI Online to ensure a backup of your critique.
9. In addition to downloading a PDF copy of the full Application (see steps 3-6), you may also view the Application by reviewing the **Application Details** tab. To download individual Application attachments, including a detailed Application Budget, scroll down to the **Templates & Uploads** section.
10. Click the **Online Review** tab, where you will enter written critiques and scores for the Application.

11. Carefully read the definitions of Strength Modifiers and Weakness Modifiers.

**Note:** Definitions for Modifiers are PFA dependent and may differ from those shown the image below.
12. Scroll down to view, evaluate, and score each **Criterion**.
13. Enter **Strengths** and **Weaknesses** as bulleted lists for each Criterion. Please use full sentences.
14. Use the drop-down menu to select the **Score** for each Criterion. Score ranges from “1” (best score) to “9” (poorest score).
15. Repeat steps 12-14 **for each Criterion**. Please note that the Merit Review Criteria text varies across PFAs.
16. Use the drop-down menu to complete the **Protection of Human Subjects** question, if applicable.
17. Use the drop-down menu to select an **Overall Score** for the Application. Score ranges from “1” (best score) to “9” (poorest score).
18. Enter **Overall Comments** in narrative (paragraph) form that describe the key strengths and weaknesses that drove your overall scoring rationale. All reviewers are required to provide an **Overall Score** and **Overall Comments**.
19. Click ‘**Save**.’

**Note:** Open Reviews can be edited, as needed, before they are submitted.
20. 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.
21. Prior to submitting the Review, you can view a read-only summary of your Critiques and Scores.
   a. If you would like to make any updates, click 'Back to Record.'
   b. To print a copy of the Review, click 'Print.'
   c. To submit, click the 'Submit' button.

Note: Your MRO will receive an email notification once you submit your Review.
22. Click ‘OK’ to finalize the submission. The page will refresh and return to the Reviewer Dashboard page.

23. Repeat steps 1-23 to critique and score all open Applications on your Reviewer Dashboard.

24. 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.

**Note Regarding Editing Your Critique:**
Merit Review Officers read all written critiques and may follow-up with questions/feedback on your written critiques. If a critique needs to be updated, 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
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.
A.2 Register as a New User
2. Click the ‘New User?’ link.
3. On the following page, enter information in the required fields (designated with a red asterisks*), and create a password.
4. Click ‘Join PCORI Portal.’
5. From here, the **Contact Information** page will appear asking you to submit additional information.
6. After entering in all required information, click 'Submit.'