PCORI Online: Guidance for the In-Person Merit Review Meeting
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Complete In-Person Merit Reviews

Based on the results of the preliminary Online Review, as well as programmatic considerations, PCORI staff select a subset of applications to move forward for discussion at the In-Person Review panel. During the in-person discussion, all members of the review panel will further clarify the merits of the application and identify its strengths and weaknesses. Each member of the review panel will also indicate a final overall score for each application discussed.

The in-person panel meeting is led by a Chair and a PCORI Merit Review Officer. MROs ensure that all applications receive a fair and thorough review. Following the in-person meeting, MROs provide written summaries of the panel discussion, which serves as additional feedback to applicants.

This section provides guidance on how to:

1.1. Prepare for In-Person Reviews
1.2. Complete In-Person Reviews
1.1 Prepare for In-Person Reviews
Applications that move forward to the in-person discussion will be available in the Reviewer Dashboard. Once your MRO notifies you that applications scheduled for panel discussion, as well as their corresponding preliminary Online Reviews, are accessible, navigate to the Reviewer Dashboard to view and download these material, which will help you prepare for the in-person panel discussion.

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. To download the Application review materials for Applications that you have been assigned, click the **Download Combined Applications/Critiques** tab.
5. Select the Application from the list to download the application materials.
6. Click the button ‘Click here to download.’

7. Click the links to access PDF versions of the Combined Online Critique and full Application. Please use these documents to prepare for, and use during, the in-person discussion.

8. At the in-person meeting, the panel will evaluate and score all Applications scheduled for discussion. To help you prepare, download the full Applications and corresponding combined online critiques for all panel Applications by repeating steps 4-7.
1.2 **Complete In-Person Reviews**

During in-person discussion, you will score and submit overall comments for each Application.

1. On the Reviewer Dashboard, click the Edit icon next to the Application record to score and submit comments. Please note that these Applications may not be listed in the **Open Reviews** tab in the order that they will be discussed at the in-person meeting.
2. Please note that you have already indicated Conflicts of Interest for all panel Applications. However, if you discover that you have a new Conflict of Interest during your in-person review of the Application, click the **Report Conflict** tab. Next indicate the type of conflict, and then click **Save** to remove yourself from this review. **Immediately notify your panel manager of the conflict.**

   **Note:** Once you select a Conflict of Interest on the **Report Conflict** tab and save, you will not be able to remove or undo your selection, and you will not be able to proceed to the **In-Person Review** tab.

3. Otherwise, click the **In-Person Review** tab.
4. When directed, use the drop-down menu to select an **Overall Review Rating** for the Application. Score ranges from “1” (best scoring) to “9” (poorest scoring).
5. Enter any **Overall Comments**.
6. Click **Save**.
7. When you have scored the Application, entered your overall comments, and are ready to submit, click **Review/Submit** at the top of the page.
8. You will be taken to a read-only page, where you can view a read-only summary of your Overall Rating and Comments.
   a. If you would like to make any updates, click ‘Back to Record.’
   b. To submit, click the ‘Submit’ button.

9. Click ‘OK’ to finalize the submission. The page will then refresh and return to the initial Reviewer Dashboard page.
10. While participating at the In-Person Panel, repeat steps 1-10 to score and add comments for each discussed Application (shown in the Open Reviews tab on your Reviewer Dashboard). You should only score an Application when instructed by your Chair.
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**.

![Contact Information page](image)