

Ford Panel Assistant Workflow

Sending Reviewers Their Link to the Rater System

1. By 10:30 am (prior to the Reviewer Briefing), log in to the Ford Rater Staff module at www.nas.edu/fordrater.
2. Select **External Readings** from the left-hand navigation menu.
3. Select **Predoctoral-2023, All Panels** at the top of the page to select only your assigned panel from the Panels: dropdown, then select **Save**.
4. Select the hyperlinked numbers of pending applications next to the first reviewer's name.
5. If not already set as the default message, change the **Template** by selecting the dropdown and select **Ford - Send Link/Credential**.
6. Select the hyperlink **To Recipient(s)** next to the Template dropdown. This will list the e-mail addresses for only your panelists.
7. Select **Select All** to check all e-mail addresses; however, be sure to cross-check **the most current roster** that was provided to you to ensure all the names match. You may need to un-check one or more e-mail addresses. Before sending, inform Melanie via the #fo-panels Slack channel of any discrepancies.
8. Select **Done** then **Send Message**.

Attending the Reviewer Briefing

All Panel Staff should plan to attend the Reviewer Briefing. See the agenda ([Science Panels](#) | [SS&H Panels](#)) or the Outlook calendar invite for the meeting link.

Starting the Zoom Meeting

1. Immediately after the Reviewer Briefing, use the Alternate Host Zoom link that was sent to you by the A/V team member (this link will allow you to join as Host) or the link for your panel listed on the agenda page linked above to join your panel's meeting (this link will allow you to join as a participant and the A/V team member who will have already started the meeting will need to give you Co-Hosting access).
2. Re-name yourself and add (Panel Assistant) after your name. This will allow reviewers to identify you if they need to contact you via chat.
3. Screen share the [General Housekeeping pdf slide](#).
4. Admit members to the meeting and track who is present using the reviewer roster provided to you. (Ask reviewers via the chat and/or aloud to re-name themselves with first and last name, if needed).
5. Add (Chair) and (Co-Chair) after the Chair and Co-Chair's names.

Sharing the General Housekeeping Rules and Facilitating Introductions

1. Give a brief self-introduction and go over general housekeeping rules for the virtual meeting:
 - a. Remind reviewers to re-name themselves (if needed – this will serve as their “name tent”).
 - b. Keep your microphone on mute unless requested to speak.
 - c. Reviewer Resources – Panelist Roster, Guide, Comment Examples, Applicant Instructions – can be found in the Rater Module.

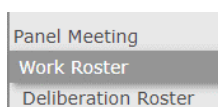
- d. Send any inquiries or concerns regarding eligibility or application completeness to the Chair or Panel Assistant via the **private Zoom chat** function; questions applicable to the entire group may be sent to **Everyone** via the chat function.
 - e. Turn your video off when reviewing applications.
 - f. Remain available online during the *entire* review process so that you can be made aware of announcements made by the Chair or Panel Assistant.
 - g. Questions and concerns that cannot easily be communicated over private Zoom chat will be discussed in breakout rooms.
2. Reiterate that you will be a resource for any questions during the review process via the chat function.
 3. Unless you have made different introduction arrangements with the Chair, communicate that you will introduce the reviewers first by calling out each reviewer's name and that you will end by introducing the Co-Chair and Chair. Use the roster that was provided to you and call off the names of each reviewer until your list is complete and leaving the Co-Chair and Chair for the end.
 - a. Reviewers should un-mute themselves and introduce themselves briefly with name, institution, and department/area of expertise.
 - b. Note any of the following reviewers:
 - i. Those who have arrived late; ask these reviewers to introduce themselves as well.
 - ii. Those who are **not present**. If there are reviewers who have not joined the meeting after 30 minutes and there is not a comment on your roster indicating will arrive late, notify Melanie via Slack at #fo-panels, providing these reviewers' names so that she can follow up with them.

Opening Rater System for Changing Scores

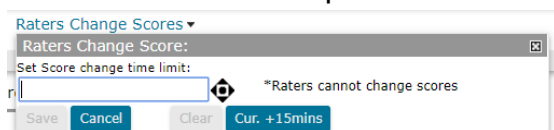
Once the Chair has completed their introduction, made opening remarks, and has addressed any questions from reviewers, the review may commence. Some reviewers may wish to take this time to change their scores; others may begin by selecting a new application to review.

Follow the steps below to open the rater system to allow reviewers to change their scores.

1. Select **Work Roster** in the left-hand navigation menu.



2. Select **Raters Change Scores** dropdown and select Cur. +15mins or set another specified time. Confirm duration with panel first.



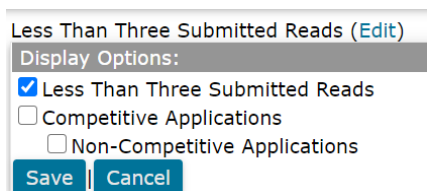
3. Announce when time is close (reviewers may not have saved before time is up) out loud and via Zoom chat. Confirm that all scores have been re-submitted before proceeding; add time if needed.

Note: Scores on any application can be changed by opening the rater system for a period of time. Individual scores can be changed at any time if the Panel Assistant un-submits an application. Comments can be added at any time and *at least* until 11:59 pm EST the day after the panel meeting concludes.

Determining and Monitoring Applications with Fewer than Three Completed Reads

Any applications with fewer than three reads must be selected by reviewers before reviewers will be able to select applications from the competitive pool.

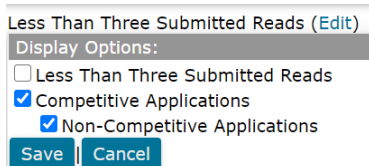
To determine which applications still require a review, open the filter menu at the top of the **Work Roster** by selecting **Edit** and then checking the **Less Than Three Submitted Reads**. Assignments in progress appear in gray.



1. Melanie will remove any applications that have not been started prior to the 11 am briefing.
2. If there are more than two in-progress applications assigned to a **reviewer who is present at the meeting**, confer with the reviewer via private Zoom chat to confirm if these applications should be removed so that other reviewers may read the applications instead.
3. If there are any in-progress applications assigned to a **reviewer who is not present at the meeting**, confer with the Chair via private Zoom chat to determine if the applications should be submitted or deleted instead.
4. The Panel Assistant can remove the assignment either by selecting the application from the Work Roster or by selecting the reviewer's name from the External Readings page. The latter may be easier if one reviewer has many in progress applications. See the **Ford Panel Assistant Tools** section in this Guide for a screenshot of these action buttons.
5. Reviewers not reading applications with fewer than three reads may select from the competitive applications while applications with fewer than three reads are being completed.

Monitoring Competitive and Non-Competitive Applications

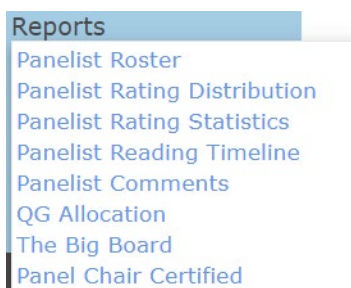
Once at least all three reads have been completed, select **Edit** then uncheck the Less Than Three Reads box and check the **Competitive** and **Non-Competitive Applications** boxes.



Reviewers select applications from the Work Roster, which shows only competitive applications that they have not yet read. If an application is being evaluated by a different reviewer, it will not be available to select until that evaluation has submitted and if it is still in the competitive list.

Accessing and Monitoring Reports

Select **Reports** in the left-hand navigation menu to open the dropdown and then open the desired report.



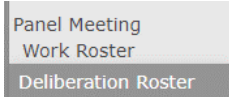
1. The **Panelist Roster** lists the names, institutions, rank/title, discipline, and research interests for each reviewer.
2. The **Panelist Rating Distribution** shows the number of applications a reviewer has scored within a specific range. Reviewers should be spreading their scores and there should not be many scores in the 1.00-1.50 range since these will likely be awardees and only a limited number of awards will be offered.
3. You did not need to monitor the **Panelist Rating Statistics** report; however, it may provide useful information as a reference point.
4. The **Panelist Reading Timeline** tracks how long a reviewer is spending on an application. If reviewers are spending less than 10 minutes, *ask your Chair to intervene via private Zoom chat.*
5. **Panelist Comments** lists all comments entered by reviewers. If reviewers are leaving inappropriate comments, *ask your Chair to intervene via private Zoom chat.*
6. **QG Allocation** provides the number of awards for each panel at each level. You will need to switch the levels on the Ford Rater Staff Home page in order to view a different level. Select Final from the drop down to view the number of awards.
7. **The Big Board** shows the progress of completion for each panel by level of the competition.
8. The **Panel Chair Certified** report shows the progress of deliberations and status of the Chair's certification.

Monitoring the Work Roster

1. Keep an eye on the **Work Roster** and remind reviewers that applications can be unsubmitted if they need to make last revisions to scores before deliberations.
2. When close to completion and only if needed – check with Melanie first if you are not sure – begin assigning applications to reviewers. These will automatically load in reviewers' view after they refresh the page. See **Making an Assignment** under the Ford Panel Assistant Tools section in this Guide for further instructions.
 - a. Reviewers can notify the Panel Assistant when they are ready for a new application.
 - b. Assign competitive applications first and non-competitive only if the average is close to being competitive (this list will shift continuously).
 - c. In some cases, reviewers may begin reading at the next level before deliberations for the current level begin. Alternatively, if there are not many applications, all applications may receive five reads. **This is common at Postdoc level.**
3. See the **Opening Deliberation** steps below to confirm that all competitive applications have received five reads before beginning deliberations.

Opening Deliberations and Screen Sharing the Deliberation Roster

1. When the Work Roster appears complete, select **Deliberation Roster** in the left-hand navigation menu to confirm that all competitive applications in QG 1 and QG2 have received five reads.



2. Verbally confirm with reviewers that all their ratings are complete.
 - a. Pending reads – indicated in a pale gray tone with a ~ symbol and the reviewer's name, such as **BCurrM** instead of a score – must be submitted prior to Deliberation.
 - b. Some applications in the Non-Competitive section may have pending reads due to the shifting Work Roster; scroll down the page and carefully check the **entire list**.
3. Select **send message to Libbie and Melanie** at the top of the Deliberation Roster to notify them that deliberations are about to begin.
4. Allow the Chair to take some time to outline the ground rules/expectations for deliberations with reviewers.
5. Confirm with the Chair that the panel is ready to begin their deliberations then screen share the Deliberation Roster and select **Open Deliberation**.
6. Inform reviewers that they can also view the roster on their device by selecting Deliberation Roster in the left-hand navigation menu. If they had already selected it before you selected Open Deliberation, they will need to refresh their page for the roster to populate. Note: If there are pending reads, the Deliberation Roster will not open.
7. Reviewers with conflicts of interest (COI) will need to notify the Panel Assistant so they can be put in a breakout room during that section of Deliberation. For more information on COI, see the General Information section below.

Viewing Applicants Listed in the Deliberation Roster

Throughout deliberations, the Panel Assistant should **screen share** applicants by **score average (default; outlier excluded) only**. *Note: Once the Panel Assistant has selected **Modify Ranking** – as noted below – reviewers and the Panel Assistant will no longer be able to use the sort functions.* You may wish to print the Deliberation Roster to pdf if you would like to preserve a record of the other order options.

Reviewers can view comments for each applicant they evaluated and can view the PDF of any application whether they reviewed it or not.

- **QG1** applicants are eligible for awards. **Precise ranking within QG1 is not critical and will not be shared with applicants.**
- **QG2** are alternates/Honorable Mentions. If any applicants in QG1 decline an award, the award will be offered to those in QG2 based on the finalized QG2 rank order. **Ranking is especially critical in the top half of QG2.**
- **QG3** receive Honorable Mention. **There is no QG3 for postdoctoral applicants.**
- **QG4** will not receive recognition.

Facilitating the Deliberations and Modifying Ranking

The goal of deliberations is to establish a list of applicants in QG's (see above) that meets the approval of a majority of reviewers. **Be proactive in guiding reviewers away from discussion that does not lead to this goal** and keep them focused on time constraints if deliberations run excessively long.

*Panel Assistants and Chairs should ensure that reviewers do not discuss moving an applicant up or down based only on membership in one of the six historically underrepresented groups. Membership in one of these groups should be taken into account **when scores are assigned** and should not be used for additional credit during final deliberations. If discussions are directed in this way, contact Libbie.*

1. Allow the reviewers to briefly view the Deliberation Roster (Panel Assistant can toggle between views as requested). After requested by Chair, reviewers should communicate to the Panel Assistant via private Zoom chat the names of any applicants not listed in QG1 or the top of QG2 (anomalies) who should be **considered for an award** (if any).
2. Share the list of additional names with the reviewers via Zoom group chat.
3. Select **Modify Ranking**. *Note: You will no longer be able to sort by a different view once you make this selection.*
4. Reviewers will only discuss applicants who have ranked in QG1 and QG2 and (if applicable) those who have been proposed as prospective awardees outside of QG1 and QG2. With three initial reads and additional panel meeting reads, we will assume confidence in the ratings that arrived at these results.
5. One of the reviewers of each application in QG1 should highlight the qualities of the application that place them in QG1.
6. Likewise, one of the reviewers of each application in the top half of QG2 should discuss the qualities of application.
7. If applicable, one reviewer should discuss the qualities of any applications not in QG1 or QG2 that have been proposed as potential awardees. If appropriate, based on general consensus of the panel, a motion should be put forward for which applicant(s) from this group should be included for further consideration in QG1 or QG2.
8. Subsequent discussion will focus on applications that may move between (or, if an anomaly,

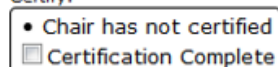
into) QG1 and QG2. Looking at the scores and based on the brief summaries provided, the Chair will ask if there are any motions to move any applicants from QG2 or outside of QG2 (only anomalies discussed above) to QG1.

- a. If there is a motion, the Chair will give additional reviewers time to ask questions or make a case for the applicant (limit time to 10 minutes total).
 - b. The Chair will hold a vote as a panel on the motion.
 - c. The steps above will be repeated for other applications as needed.
 - d. The panel will vote to finalize QG1.
9. Looking at the scores and based on the brief summaries provided, the Chair will ask if there are any motions to re-order the top half of applications in QG2.
 - a. If there is a motion, the Chair will give additional reviewers time to ask questions or make a case for the applicant (limit time to 10 minutes total).
 - b. The Chair will hold a vote as a panel on the motion.
 - c. The steps above will be repeated for other applications as needed.
 10. Record a vote on the final order of applications in QG1 and QG2.
 11. If any applicants need to be re-ranked, select them in the Deliberation Roster and move them to the appropriate position decided upon by the panel.
 12. Confirm that reviewers are satisfied with the ranking order. **A majority vote will allow the roster to be finalized.**

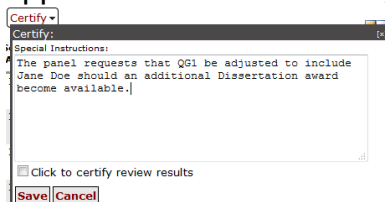
Finalizing and Certifying the Ranking

1. Select **Submit Ranking** to finalize the ranking.
2. Optional: If requested to add or reduce Honorable Mentions in QG3, move the line by selecting **QG4** then **entering the number of the Assigned Rank at which QG4 should begin**. **You will not be able to make this change until after you have selected Submit Ranking.** Contact Melanie if you require assistance.
3. **Uncheck** the Certification Complete box to poll for the Chair's certification.

Certify:



4. The Chair should choose **Certify** from their Deliberation Roster, **enter any Special Instructions** (e.g. request an additional award or advise that there are no, or limited numbers of, suitable applicants at a certain level) and then **check the box and select Save** to certify the roster.



At the Conclusion of the Review

1. Ask Chair to hold a short debriefing of reviewers to discuss the review and offer suggestions.
2. Inform reviewers they will receive an e-mail with a link to an online feedback form where they can list persons who should receive letters of appreciation for their service).
3. Remind reviewers that any application files they may have downloaded to their device as well as any digital notes they have taken must be deleted. Printed materials and handwritten notes

- should be shredded or disposed of appropriately.
4. Remind reviewers to double-check their reviewer information page to ensure that all information is current. Share the [Updating Reviewer Profile](#) slide.
5. End the Zoom meeting for all.
6. Confirm via #fo-panels Slack that your panel is done and await instructions regarding next steps.

Communication with Reviewers

When needing to communicate with the Chair or individual reviewer, be sure to utilize the **private Zoom chat first** as this is not information the entire panel needs to hear and can be very disrupting. If the Chair or reviewer begins speaking during the meeting, suggest first that you will begin a private Zoom chat with the individual. If you or the reviewer determine it would be easier to talk through the matter, set up and invite the reviewer to join the breakout room so that you may discuss.

Ford Panel Assistant Tools

Using the Action Links for an Application

Select **Work Roster** then the **applicant's name** to access the actions below.



1. **Edit** - Allows you to make changes to the rating form, e.g. if a reviewer requests a score change.
2. **Unsubmit** - Releases the application back to the reviewer to edit a rating form for an application the reviewer has read.
3. **Delete** - Removes an assignment from a reviewer. This should be used only when a reviewer cannot evaluate the application or when an application is transferred and the evaluation will not be kept. Note: If a reviewer has not yet begun the evaluation, the reviewer can select **Remove** on the Ford Rater Home page to remove the assignment themselves.
4. **Clear** - Allows the reviewer to start over with a blank rating form (rarely used).

Making an Assignment to a Reviewer

1. On the **Work Roster**, select the name of the applicant to be assigned to a reviewer.
2. On the Application Detail page, select **New Assignment...**

Name	Panel
Bonin-Rodriguez, Paul	Perf, Comm & Ar
Smith, Cherise	Perf, Comm & Ar
New Assignment ... 	

3. Select the name of the reviewer who will read the file. Assignments can also be created from the **Rater Detail** page by selecting **New Assignment...** and then selecting the name of the applicant.

Requesting an Outside Read of a Different Panel

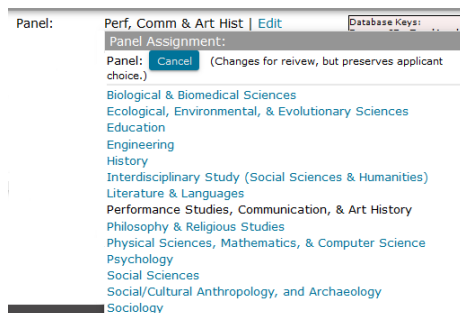
Outside reads are requested when expertise outside the panel is needed for scoring the application.

1. Chair of *sending* panel requests outside read.
2. Assign application to Chair of *receiving* panel by selecting **New Assignment...** on Applicant Detail page and then selecting the receiving panel from the dropdown. Select Chair's (Ch) name.
3. Notify Panel Assistant in *receiving* panel via #fo-panels Slack of request and action taken.
4. Chair in *receiving* panel views application and requests a reviewer to read it.
5. Panel Assistant in *receiving* panel makes assignment and notifies Panel Assistant in *sending* panel.
6. If *receiving panel does not accept request for outside read*:
 - a. Panel Assistant of *receiving* panel deletes assignment and notifies Panel Assistant in *sending* panel.
 - b. Panel Assistant of *sending* panel consults Chair for further action.
 - c. If a resolution cannot be reached, consult Libbie for further action.

Transferring an Application to a Different Panel

Transferring an application to a different panel follows the same steps as requesting an outside read (see above) with the exception that **a transferred application becomes part of the roster of the new panel.**

1. Follow Steps 1-3 above, noting that the action is requesting a transfer, not an outside read.
2. Chair in *receiving* panel views application to determine if panel will accept transfer.
3. If panel **accepts transfer**:
 - a. Panel Assistant in *receiving* panel transfers application to *receiving* panel and confirms with Panel Assistant in *sending* panel that transfer has been made.
 - i. Select **Edit** next to the *sending* panel name on the Applicant Detail page.
 - ii. Select the *receiving* panel from the list.



- b. Panel Assistant and Chair of *receiving* panel determine whether to **keep or delete reviews** from the *sending* panel.
- c. If **reviews will not be kept**, Panel Assistant in *receiving* panel deletes assignments for the transferred application from panelists in *sending* panel.
- d. If panel **does not accept transfer**, follow Step 6 above.

General Information

Privileged Information – No applicant information should be shared outside of the panel meeting. Reviewers should not look up applicants, their programs, or research on the Internet. Reviewers are expected to refrain from providing information that is not available in an applicant's file. **Only materials provided in the application should be considered.**

Plagiarism or Fraud – If a reviewer suspects plagiarism or fraud of any kind in the application, bring it to the attention of Chair via private Zoom chat and then to Libbie via #fo-panels Slack.

Eligibility – Discuss any reviewer questions regarding eligibility (field of study, academic status, etc.) with Chair via private Zoom chat or in a breakout room. With the Chair's approval, refer the application to Libbie for disposition via #fo-panels Slack. Applications cannot be made ineligible without Fellowships Office approval.

Conflict of Interest (COI) – Reviewers must self-determine if there are factors that would bias their review of an application. In general, these rules should be observed:

- The reviewer is personally acquainted with the applicant.
- The reviewer has written a letter of recommendation for the applicant.
- The applicant has attended or is planning to attend the reviewer's current or future institution.

Further guidance on COI can be found in the [Guide for Panels](#). If there are questions regarding a potential conflict of interest, consult Libbie via #fo-panels Slack.

Algorithm – After the first three scores are submitted, the rater module identifies applications that require further evaluation during the panel meeting using a predefined algorithm to classify competitive applications on the Work Roster. The algorithm uses an n-1 number for each step; this is done by taking an average of the lowest (best) scores within competitive percentages and removing the worst score. There is no restriction on who can come back into the competitive pool, so if the n-1 score is good (low) enough, an application will populate under Competitive Applicants until it falls out of the competitive percentages (based on number of reads). The Competitive pool is defined by

applicants most likely to end up in QG1, QG2 or QG3.

Troubleshooting Tips for Viewing Files

Several of the most widely used web browsers have a built-in PDF viewer. If a reviewer experiences difficulty viewing a PDF document, one solution is to switch to a different web browser. For example, if they are using Chrome, they should try viewing the PDF document in Firefox.

Another solution is to download and save the PDF document to their computer and then to open and view it in Adobe Acrobat Reader. (If they do not already have Adobe Acrobat Reader installed on their computer, it can be downloaded [here](#).)

To download, save, open, and view the PDF document:

1. Right-click on the link to the PDF.
2. Select “Save link as” or “Save target as” from the dropdown.
3. Save the PDF file in a local folder (e.g. Desktop or Documents).
4. Double-click on the file to open and view the document.

Contact Information

If you have a question or need assistance from other panel staff, send a message through the #fo-panels Slack channel.