InfoReady Reviewer Guide

Reviewers are an integral part to the application and competition management process. Use this guide to understand how reviewers experience the review process. You can also view [this video](#) for a 5-minute walkthrough.

First Time Users

Reviewers get a confirmation email notifying them that the site administrator created an account in the platform on their behalf. The language in the confirmation email is dependent on whether the reviewer is set up to log in with institutional credentials via single sign on (SSO) or has to set up a password for the site (setting up a password is usually for external reviewers).

Accessing Reviews

Recommended Browsers and Devices

- InfoReady runs best on the latest supported versions of Chrome, Edge, and Firefox browsers.
- The site should be accessed via a desktop or laptop computer. It is **not** compatible with mobile devices or tablets.

3 Ways to Access Reviews

1. Link(s) in the review assignment email notification.
   - This is the typical starting point for reviewers. Notification emails are sent to reviewers whenever administrators assign applications for reviews. Clicking application titles in the email will take reviewers directly to the review form for that specific application.
2. The **Reviews tab** on the homepage global navigation bar.
3. Link at the top of the homepage when reviewers log in to the site.

Reviews Tab

Clicking on the Reviews tab lists all assigned reviews, including reviews that have already been submitted. Reviewers can filter and sort the list of reviews by using the options in the column headers.

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Reviewers click the hyperlinked application title to access the review for that application. The applicant's name will be shown if allowed or will be marked *Withheld by Administrator* for applications part of a blind review process. Reviewers can also download application packets for all pending reviews in a single PDF by clicking the **Download Pending Applications (PDF)** button.

Submitting Reviews

Once inside the review, reviewers land on the Application and Input page. They will see anywhere from 3 to 5 options on the local menu found on the right side of the screen:

1. **Application and Input -** View application contents and input their review feedback (see below)
2. **Details -** View opportunity details like administrator names(s), award cycle, and description
3. **View Other Reviews -** (must be configured by administrator): See reviews from previous routing step
4. **View All Applications -** (must be configured by administrator): Read-only access to view all applications that were submitted to the opportunity

To navigate between applications, reviewers can use **Previous** and **Next** buttons. Please note that only the pending reviews are included in the scroll queue when using Previous and Next.

Application and Input

Reviewers will see different input fields depending on how the administrator set up the review routing step. Reviewers could encounter comment boxes, rating scales, Approve/Do Not Approve questions, file upload requirements, multiple choice, or a mix of question types. All fields with an asterisk are required fields. There are 3 ways reviewers can view the application details from the Application and Input page:

- Generate a PDF of the complete application packet by clicking the [PDF] button.
- View the application answers by clicking **Show Application Details**.
- Download the original application files from the right side of the screen (if applicable).

Reviewers can save reviews at any time by clicking the Save as Draft button. Reviews are submitted by clicking the **Submit Review** button.

Some review forms may also include a box for reviewers to add comments to the administrator that will not be shown to the applicant. If the administrator has added an acknowledgement statement, then the reviewer will need to check the box next to the acknowledgement statement to enable the **Submit Review** button (see next page):

Comments to Administrator:

Use this form to include comments that only the Administrator can read - the Applicant will not see these comments:

If showing, you can enter comments here that are meant only for Administrator(s)

Paragraphs: 0, Words: 0, Characters: 0

*Conflict of Interest Statement *If showing, you must check box in order to submit review.*

☐ By checking this box, I acknowledge that I have no conflicts of interest with the applicant or proposal.

Notifications: Review Requests Digest

The Review Requests Digest is a systemwide notification email to reviewers that comes from the email contact in the footer of the site*. By default**, they are sent twice a week, on Monday and Thursday morning to any reviewer who has a pending review assigned within the past 14 days. The Review Request Digest will include a list of any competition in which a reviewer has pending reviews and will indicate the number of reviews per competition with due dates.

The digests will stop when:
- The reviewer completes all pending reviews assigned within the past 14 days, AND/OR
- No new assignments have been made within the past 14 days

If Administrators want to stop digests for a given reviewer, they can:
- Delete their pending reviews assigned within the last 14 days.
- Complete their pending reviews assigned within the last 14 days by proxy.
- Wait 14 days for the system email prompt to expire.

*The administrator of a competition can also push out a Review Request Digest at any time to reviewers with pending reviews. If an administrator takes this action, then the email will come from the competition owner who took the action instead of the email contact in the footer of the site.

**Administrators can customize the frequency of the digest email, so you may receive it on different day(s) or less frequently (e.g., once per week, every other week).