GUIDELINES FOR
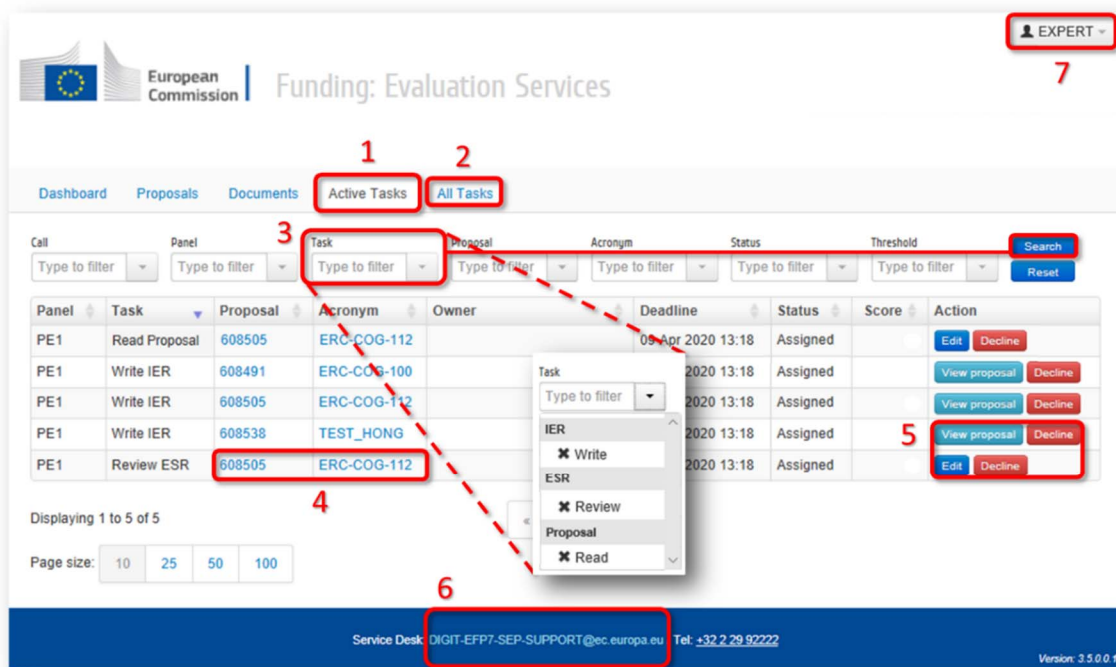
PEER REVIEW IN SEP TOOL

STARTING GRANT 2020

(PANEL MEMBERS)

1. ACCESSING THE EVALUATION TOOL AND YOUR TASKS

Login with your EU Login credentials in **https://ec.europa.eu/research/participants/evaluation**

1. **Active Tasks** – tasks that either require your **action** or are **relevant** to the current stage of the evaluation process.

2. **All Tasks** – tasks assigned to you (including tasks you submitted).

3. You can filter the proposals according to several criteria such as type of task (and then click on **Search**):
   - **Write IER** (*Individual Evaluation Report*)
     .. write your review and suggest Remote Referees (see page 4-6).

   - **Write SER** (*Suggest External Reviewers*)
     .. suggest Remote Referees (see page 7).

   - **Review ESR** (*Evaluation Summary Report*) for the lead reviewer
     .. write Panel Comments (see page 10).

   - **Read Proposal**
     .. only gives reading access to the proposals (see page 9).

4. Click on the **Acronym** or **ID number** of a proposal in order to access its **summary page** (see next page).

5. Action column:
   - **View proposal** button directs you to the **summary proposal page**.
   - **Edit** button directs you to the **assessment form** (only for accepted tasks).
   - **Decline** a review (before declining a review, contact your Panel Coordinator).

6. For **technical problems** contact your Panel Coordinator and/or the SEP Helpdesk:
   DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu

7. To **log out** click on your name.

2. ACCEPTING A "WRITE IER" OR "REVIEW ESR" TASK

Access the **summary page** of a selected proposal by clicking on the **Acronym**, **ID number** or **View proposal:**

| PE1 | Write IER | 608491 | ERC-COG-100 | 09 Apr 2020 13:18 | Assigned | | View proposal | Decline |

You will see:

1. **General** information about the task including type of task and **direct access to the research proposal**:

   Part B1
   Part B2 (only available in Step 2)
   Budget (only available in Step 2, for the Synergy call the budget is included in Part B2)

2. Information about the **proposal**, notably abstract and keywords:
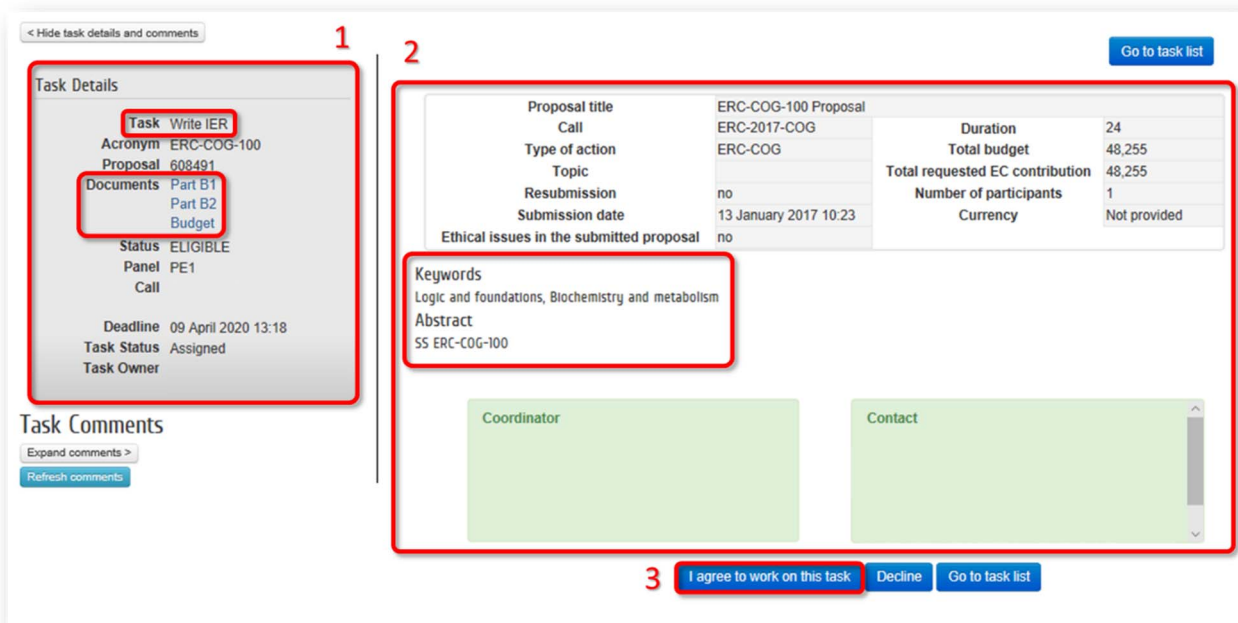
3. To **accept** the review, you have to **click on I agree to work on this task** button.

4. You will be prompted to confirm your acceptance in a popup window. <u>Please read carefully the list of potential Conflicts of Interest before accepting</u>. In case of doubt, contact your Panel Coordinator.
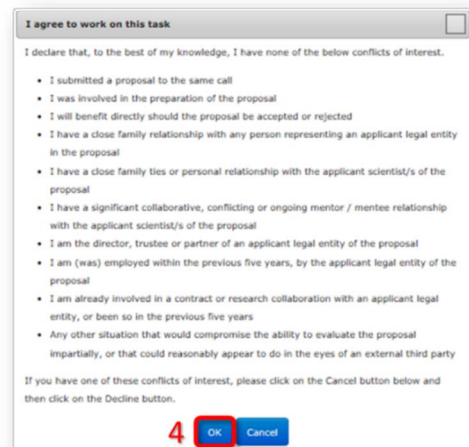
*N.B.: Once you have accepted, you can access the **assessment form** and work on the review **by clicking on the** Edit button of the proposal in the **Active Tasks** page.*

3. "WRITE IER" TASK

To access the **assessment form** and write your review, **click on** the **Edit** button of the specific proposal of your list (this button is only available for tasks previously accepted).

PE1	Write IER	608505	ERC-COG-112		09 Apr 2020 13:18	Assigned	Edit Decline

1. Direct access to the **summary page** of the proposal (see page 3).
2. Direct access to the **research proposal**:
   Part B1
   Part B2 (only available in Step 2)
   Budget (only available in Step 2, for the Synergy call the budget is included in Part B2)

→ 3. **Actual tasks** in a compressed format:
   - **Criterion 1**,
   - **Criterion 2**; and,
   - **Suggested Remote Referees** (only for Write IER task in Step 1, for Synergy call also in Step 2)

   To expand them, click on them individually or on the **Expand/Collapse all criteria** button.

4. At any moment you can **Save**, **Submit** or even **Decline** the review task.
   Once you submit, you will be asked to confirm that you have no Conflict of Interest.
5. To **download your review** in PDF or MS Word format for reference, click on **Print to PDF** or **Print to DOC** respectively.
6. To come back to the task list, click on **Go to task list**.

N.B.: *Submitted tasks will disappear from your* **Active Tasks** *tab but remain visible in* **All Tasks** *tab as finished tasks. If you want to reopen a* **task previously submitted***, please contact your Panel Coordinator.*

3.A .. INDIVIDUAL CRITERIA

➔ **Criterion 1** - **Research Project**

You are requested to:

1. Provide a <u>numerical score</u> (1 → 5);
2. Provide a <u>detailed evaluation</u> in the two boxes by answering the listed questions.

➔ **Criterion 2** - **Principal Investigator** (PI)

You are requested to:

3. Give a <u>numerical score</u> (1 → 5);
4. Reply the listed questions by <u>selecting one of the answers</u> below them;
5. (Optional) Fill in the Comments box concerning the PI criterion.

3.B .. NOMINATING REMOTE REFEREES

You are requested to nominate specialist **Remote Referees**, to be contacted at Step 2 (should the proposal reach this stage).

1. Click on **Add Remote Referee** to create a new record. For each suggested expert you have to provide the following details:

   First name
   Last name
   E-mail address
   Host Institution

   After typing the first few letters, the tool may autosuggest and autofill upon selection of experts that have been nominated in the past.

2. You can remove your suggestions one by one by clicking on **Remove Remote Referee**.

N.B.: *You will not be able to suggest experts through this form once the Write IER task is submitted. Still, you will be able to suggest names afterwards via the dedicated* **Write SER** *task that will be automatically created.*

For the Synergy call*, Write IERs tasks activated in Step 2 also include a suggested Remote Referees section. Therefore you can continue to suggest experts through the* **Write IER Step 2** *task.*

4. "WRITE SER" TASK

After submitting a Write IER task, a Write SER task is created for this specific proposal. The <u>only objective</u> of these tasks is to give you the possibility to **suggested External Reviewers** at any moment.
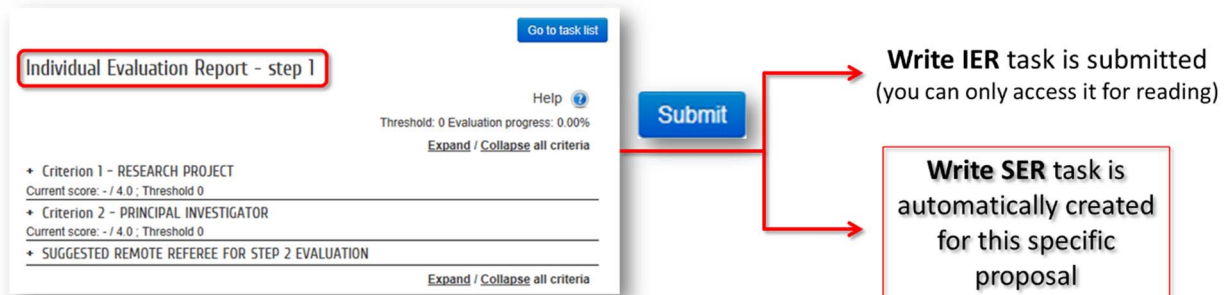
All names already suggested **in the Write IER** task are **automatically carried through** to their corresponding Write SER task. New suggestions can be introduced in the same way than in the Write IER (see previous page).

1. In order to expand this section, please click on it individually or click on the **Expand/Collapse all criteria** button to expand all criteria.
2. **Save** your work once you have added or modified a suggestion.
3. To come back to the task list, click on **Go to task list**.
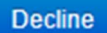
From this page you also have:

4. Direct access to the **proposal's summary page** (see page 3);
5. Direct access to the **research proposal**;

   Part B1

N.B.: *For reporting potential **Conflict of Interest**, please contact your Panel coordinator.*

5. DECLINING A "WRITE IER" OR "REVIEW ESR" TASK

N.B.: *Please **contact your Panel Coordinator before declining** to review a proposal, unless you have clear Conflict of Interest.*

Option 1. To decline a task: **click on Decline** in the **summary page** of the selected proposal (see previous page).
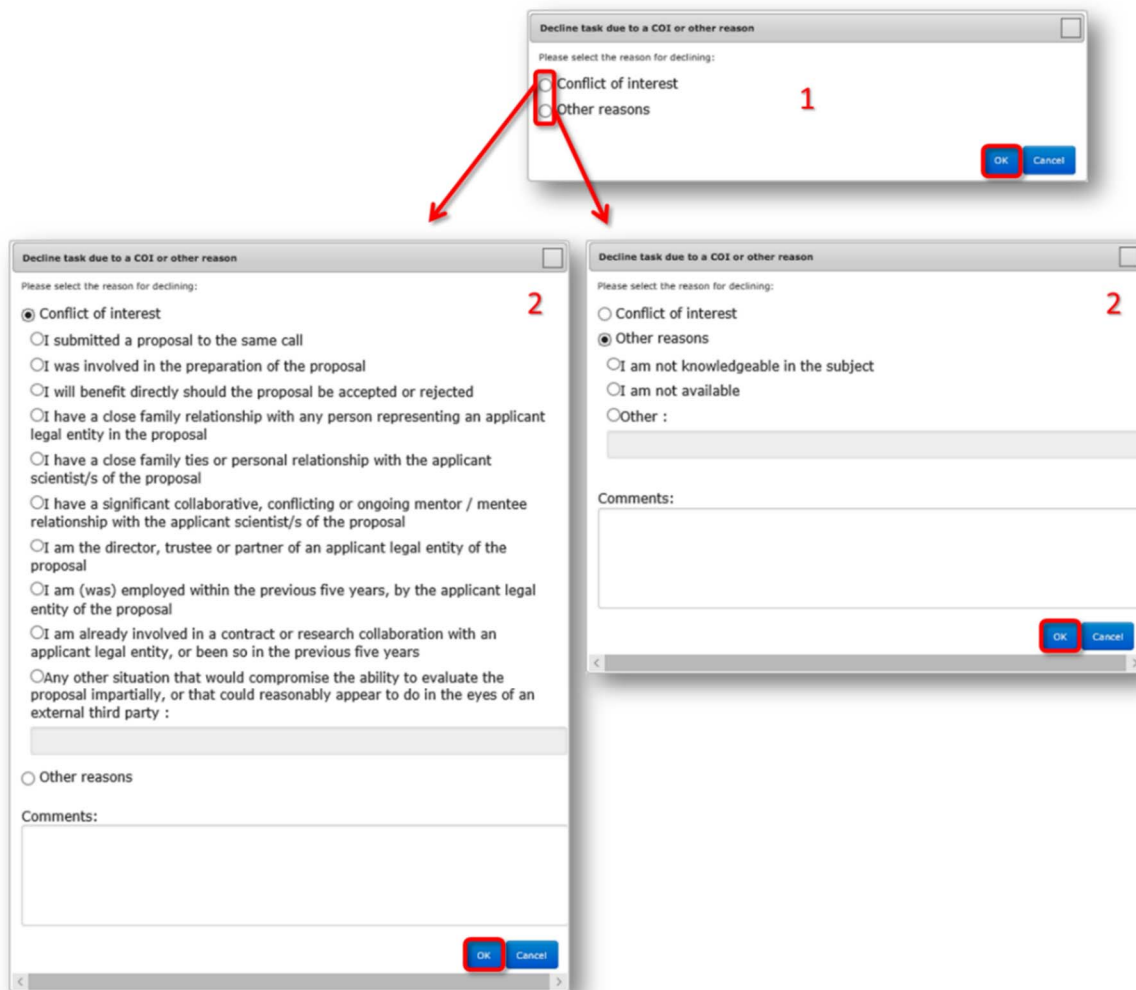
Option 2. You can decline a review in the **Active** or **All Tasks** list **by clicking on Decline** button in the **Action column**.

In either of the options, you will be asked to:

1. Choose the reason between **Conflict of Interest** (CoI) or **Other reason**;
2. and then, **specify the reason** in a new popup window.

N.B.: *Declined tasks will disappear from your **Active Tasks** tab but remains visible in **All Tasks** tab.*

N.B.: *If you want to accept a **task previously declined**, please contact your Panel Coordinator.*

6. "READ PROPOSAL" TASK

In preparation for the Panel Meetings, a **Read Proposal** task will be activated before each meeting for every proposal (including those you did not evaluate). The only objective of these tasks is to give you **read access to all your panel's proposals**.

➡️ You are **NOT required to complete any section** on these tasks.

➡️ To download all the proposals see page 11.

From this task page you have:

1. Direct access to the **proposal's summary page** (see page 3);
2. Direct access to the **research proposal**;
   Part B1
   Part B2 (only available in Step 2)
   Budget (only available in Step 2, for the Synergy call the budget is included in Part B2)

7. "REVIEW ESR" TASK

During the Panel Meeting, the **Lead Reviewers** receive access to the **Review ESR** task for each proposal they lead.

1. In the Review ESR page the Lead Reviewer can edit **Panel Comments**. In order to expand this section, please click on it or click on the **Expand/Collapse all criteria** button to expand all criteria.
2. **Save** your work, and once you have complete it, you can **Submit** your task if requested by your Panel Coordinator
3. To come back to the task list, click on **Go to task list**.

From this page you also have:

4. Direct access to the **proposal's summary page** (see page 3);
5. Direct access to the **research proposal**;
   Part B1
   Part B2 (only available in Step 2)
   Budget (only available in Step 2, for the Synergy call the budget is included in Part B2)

8. BULK PROPOSAL DOWNLOAD

To **download all proposals at once** for which you have a **Read Proposal** or **Write IER** task <u>accepted</u>:

1. Click first on **Documents**;
2. Filter your **evaluation session** (ERC-YEAR-CALL);
3. Then select proposals to download (you can select ALL proposals);
4. Click on **Select download options**.

5. In the pop-up window select **Part B1** or **B2** on type of documents and **how the documents will be structured**. Then click on **OK.**

6. Finally, to have access to the documents click on **proposal-documents**

N.B.: Remember that Read proposal tasks will be only activated in preparation for the Panel Meetings.