



APPLICATION REVIEW MODULE: CHAIRPERSON USER MANUAL

ARM CHAIRPERSON USER MANUAL

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INTRODUCTION

The Application Review Model (ARM) is a key component of the Grants Center of Excellence's (COE's) GrantSolutions ecosystem. The web-based ARM delivers a robust system to review grant applications, and ensures the seamless organization, evaluation and management of grant application lifecycle. Fair and comprehensive reviews through a standardized review process are at the heart of the ARM system. ARM participants can access the system 24/7/365 offering reviewers easy access from their home, office or remote location.

ROLE DEFINITIONS

The ARM roles are hierarchical in nature, providing the foundation for an application review workflow.

Reviewers: Individuals assigned to a panel with a set of applications for which they are responsible for providing scores and/or comments as required, reviewing each application's content against the evaluation criteria. The primary role of a reviewer is to read the grant application and assign scores based on the criteria setup for that particular review session. After entering scores for each criterion, the reviewer may enter comments (strengths and weaknesses) to justify the scores assigned to each criterion. The reviewer then submits the evaluation to the panel Chairperson.

Chairperson: As the facilitator of the panel members and panel discussion process, the Chairperson is responsible for monitoring the progress of their panel's Reviewers as well as compiling the Reviewer's comments into a final summary report produced in ARM. They are responsible for ensuring all assigned applications meet the objective of the review, and are provided to the RD.

Review Director (RD): The primary functions of this role are to monitor the review while in progress and provide final approval for all application evaluations in ARM, certifying the review is complete. Generally, this role is filled by Federal program staff. Users with the RD role cannot create new system users, and can only access sessions assigned to them by the Agency Administrator or a Session Administrator.

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ARM PROCESS MODEL 1 OVERVIEW

Process Model 1, includes a strengthened review criteria and scoring format that provides more flexibility with scoring and non-scoring criteria.

PANEL STRUCTURE

1. Panels Include:
 - a. Multiple Reviewers per panel.
 - b. One Chairperson per panel.

COMMENTS

1. Must be entered after the criterion is scored.
2. Included by evaluation criterion.
3. Separated by Strengths and Weakness.
4. Ordered by page reference.

ROLE RESPONSIBILITIES

1. Only Reviewers can score and edit their own comments.
2. Chairpersons can review all scores and comments and return submitted evaluations for updates.
3. Chairpersons compile panel comments, by application, into the Final Summary Report.
4. RDs provide final approval in a one-tier approval process.

OTHER

1. Reviewers only have visibility to their own scores and comments.
2. Reviewer evaluations can be returned by the Chairperson for editing.
3. Evaluations can be returned by the RD for editing by the Chairperson or Reviewers.

NAVIGATING ARM

The breadcrumb trail in the blue ribbon at the top of each page in ARM is your main navigation through the system. We recommend you not use your browser back and forward buttons, but instead use the breadcrumb trail.

1. Your current screen will always be displayed in the right most position and will not be an active hyperlink since that is the page that you are on.



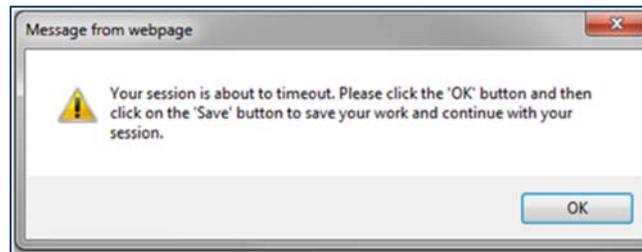
▶ [Log on/off](#) ▶ [My Home](#) ▶ [Agency Home](#) ▶ [Session](#) ▶ [Panel](#) ▶ [Application](#)

2. To go back to any previous screen, simply click the link for the desired screen.
3. If you are unsure what screen you need, you can click back one link at a time until you find the right screen.

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SYSTEM TIMEOUT

Per federal regulations, and to provide maximum data security, there is a 30-minute timeout feature in ARM that will log you out after 30 minutes of inactivity. You will receive a 5-minute warning, but to prevent data loss, please save your progress often. **Note:** Only clicking buttons and hyperlinks is considered activity, and not typing text. Each click of a button or hyperlink will reset the timeout clock.



ARM APPLICATION STATUS DEFINITIONS

Pre-Review: The Reviewer has control of the application and has not yet accessed the evaluation. Scoring and commenting has not begun.

In Review: The Reviewer has control of the application and have not yet submitted the application evaluation to the Chairperson. Scoring and commenting is in progress.

Submitted to Chair: All reviewers have completed the evaluations for the application and have submitted them to the Chairperson. The Chairperson has control of the application and can begin creating the Final Summary Report, and Reviewers cannot make any changes to their individual evaluations.

Returned by Chair: The Chairperson has identified changes in the evaluation that need to be addressed by the Reviewer. The Chairperson has returned the application to the Reviewer's control for additional work. A Chairperson will not have visibility to a reviewer's scores while an evaluation is in this status. A Chairperson cannot edit any reviewer's scores.

Submitted to RD: All Reviewers have submitted their evaluations to the Chairperson, and the Chairperson has created the Final Summary report and submitted it to the RD. The RD has control of the application to provide final approval. The panel can no longer make changes to individual evaluations or to the Final Summary Report.

Returned by RD: The RD has identified changes in the Final Summary Report that need to be addressed by the panel. The Chairperson now has control of the application for him/her to address or for him/her to return to the Reviewers for them to address. A RD cannot edit any Reviewer scores, nor make edits to any comments.

Approved: The RD is satisfied with the Final Summary Report and provides final approval of that application. No further changes are required or permitted. The Approved status signifies the beginning of the closeout process for Reviewers and Chairpersons.

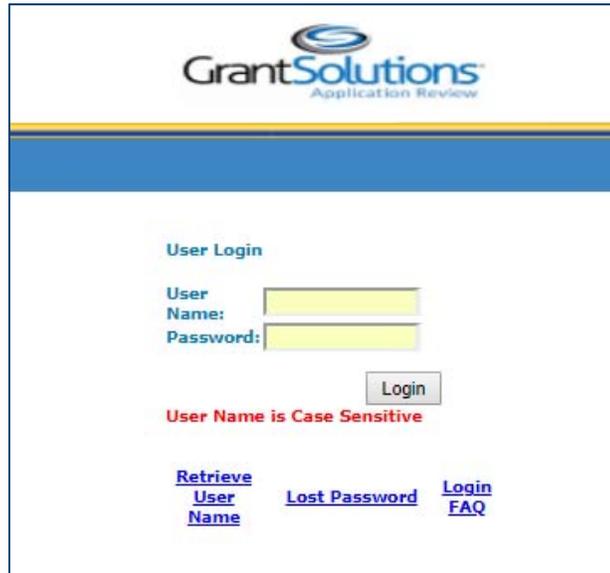
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ACCESSING ARM

You will receive the link to ARM as well as your username prior to your review. Click the link to access the ARM homepage.

LOGGING IN:

1. Navigate to the ARM homepage.



The screenshot shows the GrantSolutions Application Review homepage. At the top is the logo for GrantSolutions Application Review. Below the logo is a blue horizontal bar. Underneath the bar is the "User Login" section. It contains two input fields: "User Name:" and "Password:". Below these fields is a "Login" button. Under the button, there is a red text warning: "User Name is Case Sensitive". At the bottom of the login section, there are three links: "Retrieve User Name", "Lost Password", and "Login FAQ".

2. Enter your username and password and click the **Login** button.
3. If you have forgotten your username or password, click the [Retrieve Username](#) link or the [Lost Password](#) link and follow the instructions. All ARM account information will be sent to the email address with which your account is registered. Please be sure to add no_reply@grantsolutions.gov to your contact list to ensure you receive these emails.



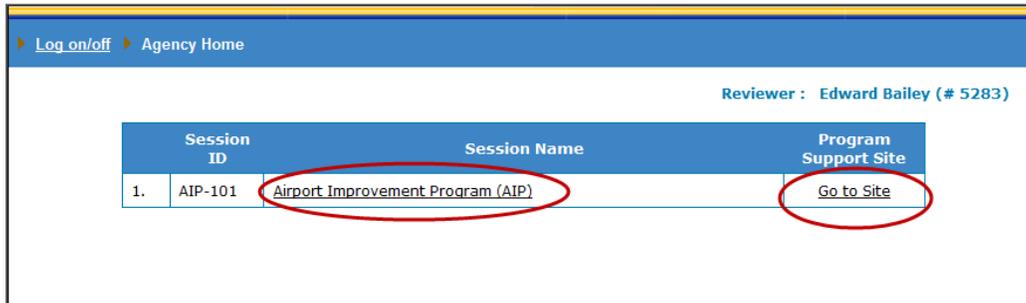
The screenshot shows the GrantSolutions Application Review homepage with two red boxes highlighting specific steps. The top box, labeled "Step 2", highlights the "User Login" section. It shows the "User Name:" field containing "CNewcomer" and the "Password:" field containing "*****". Below these fields is a "Login" button. Under the button, there is a red text warning: "User Name is Case Sensitive". The bottom box, labeled "Step 3", highlights the links: "Retrieve User Name", "Lost Password", and "Login FAQ".

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ACCESSING YOUR REVIEW SESSION

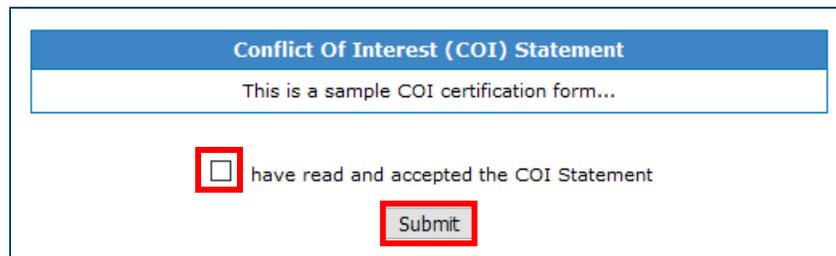
After logging in, you will need to access your review session to start building your Final Summary Report.

1. Clicking the **Login** button takes you to the Agency Home screen that lists all review sessions for which you are serving as Chairperson.
2. Click the appropriate hyperlinked session name. **Note:** If your session has a program support website with relevant information concerning your review, the link will be in the Program Support Site column. Click the Go to Site link to open it.



Log on/off Agency Home		Reviewer : Edward Bailey (# 5283)	
Session ID	Session Name	Program Support Site	
1. AIP-101	Airport Improvement Program (AIP)	Go to Site	

3. After selecting your session, you will see the Conflict of Interest (COI) Statement that you must read and accept prior to accessing the session, after clicking on your session name. If you do not see this screen, please skip to Step 5.
4. Once you have read the COI Statement, check the box indicating that you have read and accept the statement and then click the **Submit** button. You will not be able to advance to the review if you do not accept the COI statement. (Any questions regarding this statement must be directed to your review point of contact.)



Conflict Of Interest (COI) Statement

This is a sample COI certification form...

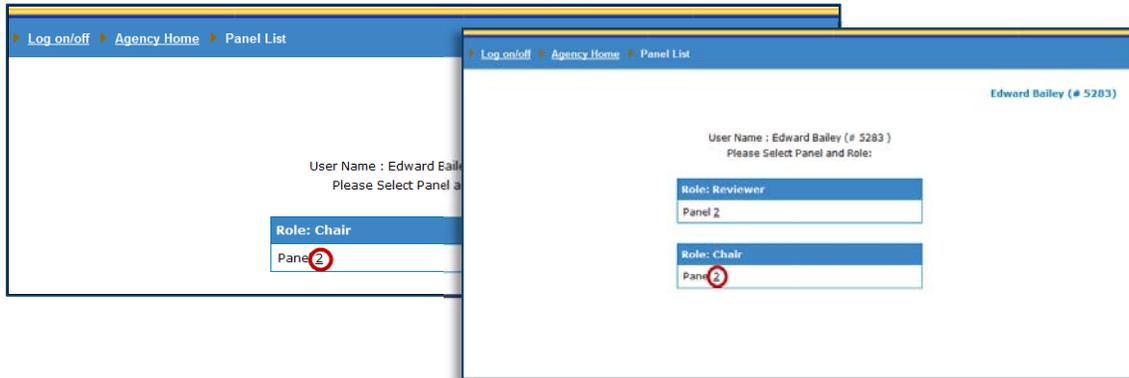
have read and accepted the COI Statement

Submit

5. You will now see the Panel List screen.

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6. Click the hyperlinked panel number under the Chairperson role to begin evaluating applications.



Note: On rare occasions, typically in the case of a conflict of interest (COI), you may be serving as a Reviewer for certain applications on your panel. Please keep in mind that in this case you will have two roles (Reviewer and Chair) listed, and to build the Final Summary Report, you will need to click the panel number under the Chair role.

7. You will now see the Application List screen, your main dashboard. You will access Reviewer evaluations and compile your Final Summary Reports for each application from this dashboard, shown on the following page.

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STARTING YOUR REVIEW

When you reach the Application List screen, your main dashboard, and see that applications are in the “Submitted to Chair” status, you are ready to begin building your Final Summary Reports.

Log on/off My Home Agency Home Panel List Applications List							
Conflict of Interest (COI)	Application Number	Application Name	Status	Average Score	Evaluations Available	Comments Added	Application File
Yes / No	18DEMO0001	Play Action Program Committee	Submitted to Chair	43.50	2 / 2	0	Open File
Yes / No	18DEMO0002	Maryland Playground Group	Returned by Chair	--	0 / 2	0	Open File
Yes / No	18DEMO0003	Playground Action Group	Approved	41.00	2 / 2	0	Open File
Yes / No	18DEMO0004	Nothern Virginian Action Group	Submitted to RD	44.00	2 / 2	0	Open File
Yes / No	18DEMO0005	Virginia Playground Action Group	Returned by RD	56.00	2 / 2	0	Open File
Yes / No	18DEMO0010	Play Action Program Committee	In-review	--	1 / 2	0	Open File

APPLICATION LIST OVERVIEW

The application list provides you with an overview of the progress that the Reviewers have made in evaluating each application. When an application is in “Submitted to Chair” status, you will be able to begin building the Final Summary Report. Click the hyperlinked application name for the desired application.

The Application List includes the following information:

1. **Conflict of Interest (COI)**
2. **Application Number**
3. **Application Name**
4. **Status:** See page 6 for detailed status definitions. **Note:** An application will only be in “Submitted to Chair” status once all evaluations have been submitted to you for that application.
5. **Average Score:** The average of the total scores Reviewers have entered for that application. **Note:** If the average score appears as double dashes, one or more reviewer has not submitted the evaluation to you.
6. **Evaluations Available:** The number of evaluations out of the total that have been submitted to you.
7. **Comments Added:** The total number of comments the Reviewers have added to that application, across all criteria.
8. **Application File:** Click the green [Open File](#) link to open the application file in a new tab or window. (This is optional and may not be available in all reviews.)

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CONFLICT OF INTEREST

Prior to accessing the evaluation screen, you must review each application and determine whether you have a conflict of interest. To start click on the green Open file link to open the application file in a new tab or window to review the application.

Log on/off ▶ My Home ▶ Agency Home ▶ Panel List ▶ Applications List

Score with * is incomplete.

Conflict of Interest (COI)	Application Number	Application Name	Status	Average Score	Evaluations Available	Comments Added	Application File
Yes No	18DEMO0020	Play Action Program Committee	Pre-review	--	0 / 1	0	Open File
Yes / No	18DEMO0021	Maryland Playground Group	Pre-review	--	0 / 1	0	Open File
Yes / No	18DEMO0022	Playgorund Action Group	Pre-review	--	0 / 1	0	Open File
Yes / No	18DEMO0023	Nothern Virginian Action Group	Pre-review	--	0 / 1	0	Open File
Yes / No	18DEMO0024	Virginia Playgorund Action Group	Pre-review	--	0 / 1	0	Open File

1. Click **No** to confirm you do not have a conflict of interest.

The application name hyperlink will then become active and you will be able to access the evaluation screen.

Log on/off ▶ My Home ▶ Agency Home ▶ Panel List ▶ Applications List

Score with * is incomplete.

Conflict of Interest (COI)	Application Number	Application Name	Status	Average Score	Evaluations Available	Comments Added	Application File
Yes / No	18DEMO0020	Play Action Program Committee	In-review	--	0 / 1	0	Open File
Yes / No	18DEMO0021	Maryland Playground Group	Pre-review	--	0 / 1	0	Open File
Yes / No	18DEMO0022	Playgorund Action Group	Pre-review	--	0 / 1	0	Open File
Yes / No	18DEMO0023	Nothern Virginian Action Group	Pre-review	--	0 / 1	0	Open File
Yes / No	18DEMO0024	Virginia Playgorund Action Group	Pre-review	--	0 / 1	0	Open File

2. If you identify that you *do* have a conflict of interest, please click **Yes**.

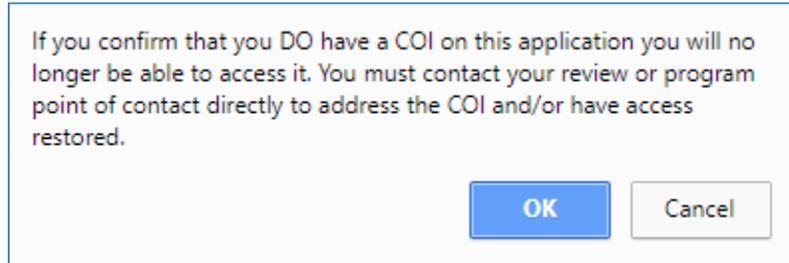
Log on/off ▶ My Home ▶ Agency Home ▶ Panel List ▶ Applications List

Score with * is incomplete.

Conflict of Interest (COI)	Application Number	Application Name	Status	Average Score	Evaluations Available	Comments Added	Application File
Yes / No	18DEMO0020	Play Action Program Committee	Pre-review	--	0 / 1	0	Open File
Yes / No	18DEMO0021	Maryland Playground Group	Pre-review	--	0 / 1	0	Open File
Yes / No	18DEMO0022	Playgorund Action Group	Pre-review	--	0 / 1	0	Open File
Yes / No	18DEMO0023	Nothern Virginian Action Group	Pre-review	--	0 / 1	0	Open File
Yes / No	18DEMO0024	Virginia Playgorund Action Group	Pre-review	--	0 / 1	0	Open File

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3. You will receive a confirmation pop-up box confirming that you understand your access to this application will be removed.



Selecting “Yes” will automatically send an email notification to a pre-determined review management representative. However, it is your responsibility to follow up with your review point of contact.

If you accidentally select “Yes” or if it is determined that a COI does not exist, your access to this application can be restored by your review point of contact.

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THE EVALUATION SCREEN

Clicking a hyperlinked application name takes you to the Evaluation screen for that application. Here you will see the list of all review criteria along with the scores the Reviewers have awarded for each. From the Evaluation screen, you can access full descriptions of the criteria and access the comments provided by your panel reviewers for discussion or addition to the Final Summary Report.

Criteria	Comments	C.Hans (25528)	C.Newc (25527)
1 The adequacy of the applicant's facilities and staff (Max. 20 points)	Comment	5	4
2 Project plan (Max. 20 points)	Comment	5	8
3 The extent to which family planning services are needed within the proposed service area (Max. 20 points)	Comment	5	4
4 The capacity of the applicant (Max. 15 points)	Comment	9	8
5 The number of patients (Max. 10 points)	Comment	4	5
6 The relative availability of non-Federal resources within the community (Max. 10 points)	Comment	8	6
7 The relative need of the applicant (Max. 5 points)	Comment	1	3
Actual Score		37	38
Average:		37.50	

[Submit to RD](#) [Return Evaluation](#) [View Report](#)

ACCESSING REVIEW CRITERIA DESCRIPTIONS

If the review criteria were setup with detailed descriptions, you may view them by following the steps below:

1. To view the full descriptions of the review criteria from the Evaluation screen, click the Criteria column header link.

Criteria	Comments	C.Hans (25528)	C.Newc (25527)
1 The adequacy of the applicant's facilities and staff (Max. 20 points)	Comment	5	4
2 Project plan (Max. 20 points)	Comment	5	8
3 The extent to which family planning services are needed within the proposed service area (Max. 20 points)	Comment	5	4
4 The capacity of the applicant (Max. 15 points)	Comment	9	8
5 The number of patients (Max. 10 points)	Comment	4	5
6 The relative availability of non-Federal resources within the community (Max. 10 points)	Comment	8	6
7 The relative need of the applicant (Max. 5 points)	Comment	1	3
Actual Score		37	38
Average:		37.50	

[Submit to RD](#) [Return Evaluation](#) [View Report](#)

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- The full descriptions of the criteria will open in a new tab or window.

Criteria Details
1 Approach (25 points) Please describe the approach the applicant took in responding to the FOA. Was everything noted in the FOA addressed? Did the applicant provide references and/or letters of confirmation?
2 Budget and Budget Justification (25 points) Was the budget and budget justification presented in an accurate manner? Were receipts and any other supporting documents included in the application.
3 Job Creation (25 points) Did the applicant describe how the grant funds would create jobs. Were the job descriptions and the amount of the salaries included? Did the applicant include resumes of potential employees?
4 Design of Project (25 points) Please score and comment on the design of the project. Is it an effective plan? Does it follow the guidelines set forth by the Federal Aviation Administration?

- You can keep that tab or window open in the background, for easy reference, as you review the comments for each criterion.

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ADDING COMMENTS TO THE FINAL SUMMARY REPORT

While Reviewer scores are added to the Final Summary Report by ARM automatically, you will need to manually add comments to the report. There are two options for adding Reviewer comments to the Final Summary Report; you can add them by criterion or select from the total list for all criteria.

ADDING COMMENTS BY CRITERION

INCLUDING REVIEWER COMMENTS

To add comments to the Final Summary Report by criterion, follow the steps below:

1. On the Evaluation screen, click the Comment link next to the desired criterion.

Log on/off | My Home | Agency Home | Panel List | Applications List | Evaluation

18DEMO0002 Maryland Playground Group
(Submitted to Chair)
City : Bethesda State : MD

Criteria	Comments	C.Hans (25528)	C.Newc (25527)
1 The adequacy of the applicant's facilities and staff (Max. 20 points)	Comment	5	4
2 Project plan (Max. 20 points)	Comment	5	8
3 The extent to which family planning services are needed within the proposed service area (Max. 20 points)	Comment	5	4
4 The capacity of the applicant (Max. 15 points)	Comment	9	8
5 The number of patients (Max. 10 points)	Comment	4	5
6 The relative availability of non-Federal resources within the community (Max. 10 points)	Comment	8	6
7 The relative need of the applicant (Max. 5 points)	Comment	1	3
Actual Score		37	38
Average:		37.50	

Submit to RD | Return Evaluation | View Report

2. You will now see the Comments screen that will list all comments you have added to the Final Summary Report for that criterion. This screen will not display any comments initially, prior to you adding them. **Note:** This screen will also display any comments you have added using the second option to add all comments at once, details below.

Log on/off | Agency Home | Panel List | Applications List | Evaluation | Comments

Panel: 1 Note Taker : Edward Bailey (# 5283)

AIP-1008 Newark Liberty International
(Submitted to Chair)
City : Newark State : NJ

1 Approach

Comments	Add a New Comment	View and Include Reviewer Comments
----------	-----------------------------------	--

3. To add Reviewer comments, click the View and Include Reviewer Comments link.
4. You will now see the Edit Comment screen which will display all comments added by all reviewers, for that criterion. **Note:** If no comments are displayed below a Reviewer's name, that Reviewer has not submitted any comments for the criterion.

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- Click the checkbox next to all comments you would like to add to the Final Summary Report, or click the **Select All** button to check the boxes for all comments if you want to add all to the report.

The screenshot displays three reviewer comments for application AIP-1008 Newark Liberty International. Each comment is shown in a separate section with a reviewer name and ID. The first two comments are selected, indicated by checked checkboxes. The third comment is not selected. At the bottom, a red oval highlights the 'Select All', 'De-Select All', 'Add to Final Comments', and 'Cancel' buttons.

Reviewer	Comment	Page	Text
E.Bail (5283)	<input checked="" type="checkbox"/> Comment 1 Not Added	Pages 22-26	Strength The applicant's business plan contains documentation of commitment and support from employers and business and industry to commit to job creation for the targeted population.
M.Mill (4045)	<input checked="" type="checkbox"/> Comment 1 Not Added	Entire Application	Strength The applicant demonstrated successful history and stability by indicating it has obtained millions in grants for infrastructure needs and business.
J.Test (4047)	<input type="checkbox"/> Comment 1 Not Added	Entire Application	Weakness The application does not address any required elements of the business plan, such as a description of the product or services, a marketing plan, an operations plan or identification of job creation activities.

- Finally, click the **Add to Final Comments** button to add all selected comments to the Final Summary Report. The red status next to the selected comments will change from "Not Added" to "Added," and the Comments screen for that criterion will now display all the selected comments along with the date and time they were added.
- Click the Evaluation link in the breadcrumb trail to return to the Evaluation screen and repeat all steps for the remaining criteria.

The screenshot shows the Evaluation screen for application AIP-1008 Newark Liberty International. The breadcrumb trail at the top includes 'Log on/off', 'Agency Home', 'Panel List', 'Applications List', 'Evaluation', and 'Comments'. The 'Evaluation' link is circled in red. The main content area shows a list of comments for the '1 Approach' criterion, including their strength or weakness, page numbers, and the date and time they were added to the report.

Panel: 1 Note Taker: Edward Bailey (# 5283)

AIP-1008 Newark Liberty International
(Submitted to Chair)
City: Newark State: NJ

1 Approach

Comments	Add a New Comment	View and Include Reviewer Comments	Retrieve the Last Comment
Comment 1 Edit / Delete			Added to Report on: Fri Nov 9, 2012 - 2:50:32 PM Eastern Time
Strength			Page: Pages 32-44
The applicant utilizes an appropriate and relevant source to cite data in establishing need for the proposed project.			
Comment 2 Edit / Delete			Added to Report on: Fri Nov 9, 2012 - 2:50:32 PM Eastern Time
Strength			Page: Pages 78-82
Applicant documented clear documentation of plans to provide small loans; entrepreneurship training and job creation are documented. The applicant documented these examples.			
Comment 3 Edit / Delete			Added to Report on: Fri Nov 9, 2012 - 2:50:32 PM Eastern Time
Weakness			Page: Entire Application
Applicant fails to identify the structure of the organization or its budget as outline in the announcement.			

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ADDING NEW COMMENTS

Though not required, if you deem it necessary, you can add new comments to the Final Summary Report. Adding new comments can only be done by criterion. Follow the steps below:

1. On the Evaluation screen, click the [Comment](#) link next to the desired criterion.

Criteria	Comments	C-Hans (25578)	C-Newc (25577)
1 The adequacy of the applicant's facilities and staff (Max. 20 points)	Comment	5	4
2 Project plan (Max. 20 points)	Comment	5	8
3 The extent to which family planning services are needed within the proposed service area (Max. 20 points)	Comment	5	4
4 The capacity of the applicant (Max. 15 points)	Comment	9	8
5 The number of patients (Max. 10 points)	Comment	4	5
6 The relative availability of non-Federal resources within the community (Max. 10 points)	Comment	8	6
7 The relative need of the applicant (Max. 5 points)	Comment	1	3
Actual Score		37	38
Average:		37.50	

2. You will now see the Comments screen.
3. Click the [Add a New Comment](#) link.

Panel: 1 Note Taker: Edward Bailey (# 5283)

AIP-1008 Newark Liberty International
(Submitted to Chair)
City: Newark State: NJ

1 Approach

Comments [Add a New Comment](#) [View and Include Reviewer Comments](#) [Retrieve the Last Comment](#)

Comment 1 [Edit](#) / [Delete](#) Added to Report on: Fri Nov 9, 2012 - 3:50:12 PM Eastern Time
Page: Pages 22-44
Strength
The applicant utilizes an appropriate and relevant source to cite data in establishing need for the proposed project.

Comment 2 [Edit](#) / [Delete](#) Added to Report on: Fri Nov 9, 2012 - 3:50:12 PM Eastern Time
Page: Pages 78-82
Strength
Applicant documented clear documentation of plans to provide small loans; entrepreneurship training and job creation are documented. The applicant documented these examples.

Comment 3 [Edit](#) / [Delete](#) Added to Report on: Fri Nov 9, 2012 - 3:50:12 PM Eastern Time
Weakness
Page: Entire Application
Applicant fails to identify the structure of the organization or its budget as outline in the announcement.

4. You will now see an alternate Edit Comment screen where you can enter new comments.
5. Click the Category dropdown menu to choose whether your comment is a Strength, a Weakness or a General comment.
6. Type in the page number or page identifying information. **Note:** Follow the instructions you receive from the review point of contact for completing this field with the appropriate page information.

COMMENTING NOTES:

You may find it useful to use a word processing program or text editor to draft your comments so you only need to copy and paste them into ARM. Because ARM is a plaintext program, we recommend the use of a plaintext text editor like Notepad.

If you use a word processing program like Microsoft Word, any special characters or formatting (like bulleted lists) will not paste properly if pasting directly from Word into ARM.

Also, ARM does not require comments to be added for you to submit your evaluation to the RD. Please make sure that you have added all necessary comments prior to clicking the Submit to Chair button.

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7. Enter your comment in the large textbox. **Note:** You have a 4,000-character limit per comment.

1 Approach

Fields with * are required.

Category* : Strength

Page* : Entire Application (Max. length is 50 characters.)

Comment Text* : The applicant demonstrated successful history and stability by indicating it has obtained millions in grants for infrastructure needs and business.

(Max. length is 4000 characters.)

Submit Spell Check Save

8. Click the **Spell Check** button to check for spelling errors in your comment.
9. Click the **Submit** button to finalize your comment and add it to your evaluation. The three fields will clear and your comment will now appear below the large textbox. **Note:** You can also click the **Save** button to save your draft comment prior to adding it to the evaluation. To retrieve a saved comment to finalize it, click the Retrieve the Last Comment link on the Comments screen.
10. To continue adding additional comments for the criterion, repeat steps 3-9.
11. Follow the steps outlined above to continue entering scores and comments for the remaining criteria.

EDITING AND DELETING COMMENTS

After adding Reviewer comments or new comments to the Final Summary Report, you may need to edit or delete them. Again, this can only be done by criterion. Note: Editing and Deleting Follow the steps below:

1. On the Evaluation screen, click the Comment link next to the desired criterion.

Log on/off My Home Agency Home Panel List Applications List Evaluation

18DEMO0002 Maryland Playground Group
(Submitted to Chair)
City : Bethesda State : MD

Criteria	Comments	C.Hans (25528)	C.Mewc (25522)
1 The adequacy of the applicant's facilities and staff (Max. 20 points)	Comment	5	4
2 Project plan (Max. 20 points)	Comment	5	8
3 The extent to which family planning services are needed within the proposed service area (Max. 20 points)	Comment	5	4
4 The capacity of the applicant (Max. 15 points)	Comment	9	8
5 The number of patients (Max. 10 points)	Comment	4	5
6 The relative availability of non-Federal resources within the community (Max. 10 points)	Comment	8	6
7 The relative need of the applicant (Max. 5 points)	Comment	1	3
Actual Score		37	38
Average:		37.50	

Submit to RD Return Evaluation View Report

ARM CHAIRPERSON USER MANUAL

- You will now see the Comments screen, with all comments you have added to the Final Summary Report.
- To delete a comment, click the Delete link next to the comment number. **Note:** Deleted Reviewers' comments will remain in the list for you to select and add again if desired. Deleted comments created by the Chairperson will be permanently deleted and cannot be recovered.

Panel: 1 Note Taker : Edward Bailey (# 5283)

AIP-1008 Newark Liberty International
(Submitted to Chair)
City : Newark State : NJ

1 Approach

Comments Add a New Comment View and Include Reviewer Comments Retrieve the Last Comment

Comment 1 Edit / Delete Added to Report on: Fri Nov 9, 2012 - 2:50:32 PM Eastern Time
Strength Page: Pages 32-44
The applicant utilizes an appropriate and relevant source to cite data in establishing need for the proposed project.

Comment 2 Edit / Delete Added to Report on: Fri Nov 9, 2012 - 2:50:32 PM Eastern Time
Strength Page: Pages 78-82
Applicant documented clear documentation of plans to provide small loans; entrepreneurship training and job creation are documented. The applicant documented these examples.

Comment 3 Edit / Delete Added to Report on: Fri Nov 9, 2012 - 2:50:32 PM Eastern Time
Weakness Page: Entire Application
Applicant fails to identify the structure of the organization or its budget as outline in the announcement.

- To edit a comment, click the Edit link next to the comment number and follow steps 5-9 in the Adding New Comments section above.

ADDING ALL COMMENTS AT ONCE

You also have the option to add comments for all criteria at once.

HOW TO ADD ALL COMMENTS AT ONCE

To add comments for all criteria at one time follow the steps blow:

- On the Evaluation screen, click the hyperlinked Comments column header.

Log on/off My Home Agency Home Panel List Applications List Evaluation

18DEMO0002 Maryland Playground Group
(Submitted to Chair)
City : Bethesda State : MD

Criteria	Comments	C.Hans (25528)	C.Newc (25527)
1 The adequacy of the applicant's facilities and staff (Max. 20 points)	<u>Comment</u>	5	4
2 Project plan (Max. 20 points)	<u>Comment</u>	5	8
3 The extent to which family planning services are needed within the proposed service area (Max. 20 points)	<u>Comment</u>	5	4
4 The capacity of the applicant (Max. 15 points)	<u>Comment</u>	9	8
5 The number of patients (Max. 10 points)	<u>Comment</u>	4	5
6 The relative availability of non-Federal resources within the community (Max. 10 points)	<u>Comment</u>	8	6
7 The relative need of the applicant (Max. 5 points)	<u>Comment</u>	1	3
	Actual Score	37	38
	Average:	37.50	

Submit to RD Return Evaluation View Report

ARM CHAIRPERSON USER MANUAL

- You will now see the complete list of all reviewer comments for all review criteria. **Note:** If no comments are displayed below a Reviewer's name that Reviewer has not submitted any comments for that criterion.
- Click the checkbox next to all comments you would like to add to the Final Summary Report, or click the **Select All** button to check the boxes for all comments if you want to add all to the report.

The screenshot displays a web interface titled "List of Available Reviewer Comments". At the top right, it says "Panel: 1 Chair: Edward Bailey (# 5283)". Below this, the application details are shown: "AIP-1001 Birmingham-Shuttlesworth International (Submitted to Chair)", "City: Birmingham State: AL".

The interface is divided into four sections, each representing a different criterion:

- 1 Approach:** Shows three reviewers. A comment by S.Stro (4049) is selected, with a red box around the checkbox and the text "Comment 1 Added". The comment text is: "Strength Page: Entire Application Applicant identifies a third party evaluator who is experienced in evaluating community economic development programs. There is indication of some outcome objectives."
- 2 Budget and Budget Justification:** Shows three reviewers. A comment by S.Stro (4049) is selected, with a red box around the checkbox and the text "Comment 1 Not Added". The comment text is: "Weakness Page: 33 The applicant fails to indicate or identify what if any kinds of new jobs will be created as a result of the initiative."
- 3 Job Creation:** Shows three reviewers. A comment by J.Flow (4048) is selected, with a red box around the checkbox and the text "Comment 1 Not Added". The comment text is: "Strength Page: Job Creation Section The applicant was very detailed in what sort of jobs would be created if the grant were to be approved."
- 4 Design of Project:** Shows three reviewers. A comment by E.Bail (5283) is selected, with a red box around the checkbox and the text "Comment 1 Not Added". The comment text is: "Strength Page: Entire Application Applicant identifies a third party evaluator who is experienced in evaluating community economic development programs. There is indication of some outcome objectives."

At the bottom of the interface, there are four buttons: "Select All", "De-Select All", "Add to Final Comments" (circled in red), and "Cancel".

- Finally, click the **Add to Final Comments** button to add all selected comments to the Final Summary Report. The red status next to the selected comments will change from "Not Added" to "Added," and the Comments screen for the individual criteria will now display all the selected comments along with the date and time they were added.
- Viewing, editing, and/or deleting any comments that you added via this method will need to be done by criterion. Follow the steps in the Adding Comments by Criterion section above to accomplish these tasks.

ARM CHAIRPERSON USER MANUAL

AVOIDING DUPLICATE COMMENTS

Reviewer comments should not be added to your Final Summary Report in duplicate. To avoid adding duplicate comments, it is important to note that, using both options above, every time you check the checkbox next to a comment and click the **Add to Final Comments** button, that checked comment will be added. If you have already added it, it will be added again.

Please pay attention when selecting the comments and do not check the box next to any comments that show an “Added” status. If you have already added comments to the Final Summary Report for all criteria, you may not want to use the **Select All** button when adding more comments. If you do add duplicate comments, you can delete them by following the steps in the Editing and Deleting Comments section above.

Also, keep in mind that if you have added comments to your Final Summary Report and then return an evaluation to a Reviewer for edits to existing comments, you will need to delete the originally added comments if you will be adding the newly revised comments.

ARM CHAIRPERSON USER MANUAL

RETURNING EVALUATIONS TO REVIEWERS

If you find that any Reviewer evaluations should be updated and edited for scores and/or comments, you can return the evaluation to the Reviewer to make the changes. You will be able to return it to them with your feedback. Please note that while you can suggest Reviewers make changes to their scores and/or comments, they may choose not to follow your suggestions.

HOW TO RETURN EVALUATIONS

To return evaluations to the Reviewers for updates and edits, follow the steps below:

1. On the Evaluation screen, click the **Return Evaluation** button.

18DEMO0002 Maryland Playground Group (Submitted to Chair) City : Bethesda State : MD				
Criteria	Comments	C.Hans (25528)	C.Newc (25527)	
1 The adequacy of the applicant's facilities and staff (Max. 20 points)	Comment	5	4	
2 Project plan (Max. 20 points)	Comment	5	8	
3 The extent to which family planning services are needed within the proposed service area (Max. 20 points)	Comment	5	4	
4 The capacity of the applicant (Max. 15 points)	Comment	9	8	
5 The number of patients (Max. 10 points)	Comment	4	5	
6 The relative availability of non-Federal resources within the community (Max. 10 points)	Comment	8	6	
7 The relative need of the applicant (Max. 5 points)	Comment	1	3	
		Actual Score	37	38
		Average:	37.50	

Submit to RD **Return Evaluation** View Report

2. You will now see the Reject Evaluation screen with comment boxes for each criterion as well as a general box where you will enter your feedback.

1325168123 Playground ACTION Group, INC
(Submitted to Chair)
City : Breckenridge State : GA

Return Evaluation to the following reviewer(s) for reconsideration:

- (x1999) Karl Davis (Evaluation Submitted to Chair)
- (x4000) Jane Dines (Evaluation Submitted to Chair)
- (x4004) Denise Hagerly (Evaluation Submitted to Chair)

All Least One Comment is Required and Each Comment is Limited to 4000 Characters

1 - Technical Approach

1 - Budget

2 - Is the organization prepared to do the project?

General Return Comment

All Least One Comment is Required and Each Comment is Limited to 4000 Characters

Submit Cancel Save Spell Check

ARM CHAIRPERSON USER MANUAL

3. Click the checkbox next to the name or names of the panelists to whom you want to return evaluations.

132516EE121 Playground ACTION Group, INC
([Submitted to Chair](#))
City : Waycross State : GA

Return Evaluation to the following reviewer(s) for reconsideration:

(#5998) Karl Davis (Evaluation Submitted to Chair)

(#6000) Jane Dines (Evaluation Submitted to Chair)

(#6004) Denese Hagerty (Evaluation Submitted to Chair)

4. Enter your feedback in the appropriate criteria or general textbox. You may enter individual return comments for each criterion, but only one return comment in one textbox is required. **Note:** Each field has a 4,000-character limit.

At Least One Comment is Required and Each Comment is Limited to 4000 Characters

1-Technical Approach

2-Is the organization prepared to do the project?

General Return Comment

At Least One Comment is Required and Each Comment is Limited to 4000 Characters

5. Click the **Spell Check** button to check your spelling, and click the **Save** button to save your draft comments without returning the evaluations to the Reviewers.
6. Finally click the **Submit** button to return the evaluations to the Reviewers.
7. The status of that application will now be “Returned by Chair,” and you will no longer have access to panel scores until all evaluations are resubmitted to you.

ARM CHAIRPERSON USER MANUAL

REVIEWING AND SUBMITTING THE FINAL SUMMARY REPORT

You can view the PDF Final Summary Report at any time, but doing so when you have finished compiling the Final Summary Report will be an important step in finalizing the report. This gives you the chance to view the report as the RDs will see it, proofread the report, and spot any duplicate comments or formatting issues.

REVIEWING THE FINAL SUMMARY REPORT

To view the PDF Final Summary Report, follow the steps below:

1. On the Evaluation screen, click the **View PDF Report** button.

18DEMO0002 Maryland Playground Group (Submitted to Chair) City : Bethesda State : MD				
Criteria	Comments	C.Hans (25528)	C.Newc (25527)	
1 The adequacy of the applicant's facilities and staff (Max. 20 points)	Comment	5	4	
2 Project plan (Max. 20 points)	Comment	5	8	
3 The extent to which family planning services are needed within the proposed service area (Max. 20 points)	Comment	5	4	
4 The capacity of the applicant (Max. 15 points)	Comment	9	8	
5 The number of patients (Max. 10 points)	Comment	4	5	
6 The relative availability of non-Federal resources within the community (Max. 10 points)	Comment	8	6	
7 The relative need of the applicant (Max. 5 points)	Comment	1	3	
Actual Score		37	38	
Average:		37.50		

Submit to RD Return Evaluation **View Report**

2. The PDF Final Summary Report will open in a new tab or window.



ARM CHAIRPERSON USER MANUAL

3. The PDF report lists the individual reviewer scores by criterion along with the average score on the first page, followed by the comments listed by criterion. For each criterion, comments are organized with Strengths first followed by Weakness comments. If you see the word “None” for any comment category for any criterion, it means that no comments were added to the Final Summary Report for that category for that criterion.
4. Once you finish proofreading the report, you can close the tab or window in which it loaded, and you will be ready to submit the Final Summary Report to the RD for approval.

SUBMITTING THE FINAL SUMMARY REPORT

After compiling your Final Summary Report, you will be ready to submit it to the RD for approval.

1. On the Evaluation screen, click the **Submit to RD** button.

18DEMO0002 Maryland Playground Group (Submitted to Chair) City : Bethesda State : MD			
Criteria	Comments	C.Hans (25528)	C.Newc (25527)
1 The adequacy of the applicant's facilities and staff (Max. 20 points)	Comment	5	4
2 Project plan (Max. 20 points)	Comment	5	8
3 The extent to which family planning services are needed within the proposed service area (Max. 20 points)	Comment	5	4
4 The capacity of the applicant (Max. 15 points)	Comment	9	8
5 The number of patients (Max. 10 points)	Comment	4	5
6 The relative availability of non-Federal resources within the community (Max. 10 points)	Comment	8	6
7 The relative need of the applicant (Max. 5 points)	Comment	1	3
Actual Score		37	38
Average:		37.50	

2. Click the **OK** button in the confirmation box.

Submit Final Report?

3. The status for that application will now be “Submitted to RD,” and you will no longer be able to make changes to the Final Summary Report, though you will be able to view it.

ARM CHAIRPERSON USER MANUAL

RETURNED FINAL SUMMARY REPORTS

If the RD identifies changes that are needed to the Final Summary Report, he or she may return it to you with suggested edits. If any Final Summary Reports are returned to you, you will need to review the Return History, make sure all necessary changes are made to the Final Summary Report, and resubmit it to the RD.

CHECKING THE RETURN HISTORY

1. When a RD returns Final Summary Report to you, the status of that application will change to “Returned by RD.”
2. On either the Application List screen or the Evaluation screen, click the Returned by RD status link.

Log on/off My Home Agency Home Panel List Applications List

Score with * is incomplete.

Conflict of Interest (COI)	Application Number	Application Name	Status	Average Score	Evaluations Available	Comments Added	Application File
Yes / No	18DEMO0001	Play Action Program Committee	Submitted to Chair	43.50	2 / 2	0	Open File
Yes / No	18DEMO0002	Maryland Playground Group	Returned by Chair	--	0 / 2	0	Open File
Yes / No	18DEMO0003	Playground Action Group	Approved	41.00	2 / 2	0	Open File
Yes / No	18DEMO0004	Notern Virginian Action Group	Submitted to RD	44.00	2 / 2	0	Open File
Yes / No	18DEMO0005	Virginia Playground Action Group	Returned by RD	56.00	2 / 2	0	Open File
Yes / No	18DEMO0010	Play Action Program Committee	In-review	--	1 / 2	0	Open File

3. The Return History screen will open in a new tab or window, and it will detail the reasons why the RD has returned the evaluation.

FL-753329Florida Dept of Health

May 17, 2013: Rejected By SSO #5286

General Return Comment
This is the "General Return Comment" field which is mandatory.

1-Approach
Return Comments go here for each criterion.

2-Budget and Budget Justification
Return Comments go here for each criterion.

3-Job Creation
Return Comments go here for each criterion.

4-Impact on Community
Return Comments go here for each criterion.

Feb 27, 2013: Rejected By SSO #5286

General Return Comment
Rhonda, please double check your scores and comments and re-submit the evaluation to me.

4. After reading and considering the RD’s feedback, you will be ready to make all necessary changes.

ARM CHAIRPERSON USER MANUAL

EDITING EVALUATIONS AND RESUBMITTING TO THE RD

IF YOU CAN MAKE THE CHANGES YOURSELF

1. Follow the instructions in the Editing Scores and/or Adding Comments sections above to enter/edit any scores and comments.
2. Once all necessary changes are incorporated into the Final Summary Report, follow the instructions in the Submitting the Final Summary Report section to resubmit to the RD.

IF YOU CANNOT MAKE THE CHANGES YOURSELF

1. Follow the instructions in the Returning Evaluations to Reviewers section to have them make the changes.
2. When the Reviewers resubmit their evaluations to you, follow the instructions in the Adding Comments section above to make sure all edited comments, as applicable, are incorporated into the Final Summary Report.
3. Once all necessary changes are incorporated into the Final Summary Report, follow the instructions in the Submitting the Final Summary Report section to resubmit to the RD.

ARM CHAIRPERSON USER MANUAL

COMPLETING THE REVIEW

Once you submit your evaluations to the RD, the RD will be responsible for completing the final steps. When the RD is satisfied with the Final Summary Report, they will approve that application. At that point, the status of that application will change to “Approved,” and your role as Chairperson for that application will be complete. Your only remaining task, **IF REQUIRED**, will be to print, sign, and mail your PDF Final Summary Reports.

PRINTING FINAL SUMMARY REPORTS

Follow the Reviewer instructions you receive from your review point of contact or from the federal program staff. **If** you are required to submit printed and signed PDF versions of your Final Summary Reports, follow the steps below:

1. Your PDF Final Summary Reports with signature and date lines for an application will only be available after that application is in “Approved” status.

The screenshot shows a navigation bar with links: Log on/off, My Home, Agency Home, Panel List, and Applications List. Below the navigation bar is a table with the following columns: Conflict of Interest (COI), Application Number, Application Name, Status, Average Score, Evaluations Available, Comments Added, and Application File. A red note at the top right of the table states "Score with * is incomplete." The table contains seven rows of application data. The row for application 18DEMO0003, "Playgorund Action Group", has a status of "Approved" which is circled in red.

Conflict of Interest (COI)	Application Number	Application Name	Status	Average Score	Evaluations Available	Comments Added	Application File
Yes / No	18DEMO0001	Play Action Program Committee	Submitted to Chair	43.50	2 / 2	0	Open File
Yes / No	18DEMO0002	Maryland Playground Group	Returned by Chair	--	0 / 2	0	Open File
Yes / No	18DEMO0003	Playgorund Action Group	Approved	41.00	2 / 2	0	Open File
Yes / No	18DEMO0004	Nothern Virginian Action Group	Submitted to RD	44.00	2 / 2	0	Open File
Yes / No	18DEMO0005	Virojnia Playgorund Action Group	Returned by RD	56.00	2 / 2	0	Open File
Yes / No	18DEMO0010	Play Action Program Committee	In-review	--	1 / 2	0	Open File

2. From the Evaluation screen, click the **View PDF Report** button to open the PDF report in a new tab or window.

The screenshot shows the evaluation screen for application 18DEMO0002, "Maryland Playground Group". The status is "Submitted to Chair". The location is Bethesda, MD. The table below shows the evaluation criteria and scores for two reviewers, C. Hans (25528) and C. Newc (25527). The "View Report" button is highlighted with a red box.

Criteria	Comments	C. Hans (25528)	C. Newc (25527)
1 The adequacy of the applicant's facilities and staff (Max. 20 points)	Comment	5	4
2 Project plan (Max. 20 points)	Comment	5	8
3 The extent to which family planning services are needed within the proposed service area (Max. 20 points)	Comment	5	4
4 The capacity of the applicant (Max. 15 points)	Comment	9	8
5 The number of patients (Max. 10 points)	Comment	4	5
6 The relative availability of non-Federal resources within the community (Max. 10 points)	Comment	8	6
7 The relative need of the applicant (Max. 5 points)	Comment	1	3
Actual Score		37	38
Average:		37.50	

Buttons: Submit to RD, Return Evaluation, View Report

ARM CHAIRPERSON USER MANUAL

3. Print, sign and date the PDF report.

The image shows two overlapping forms titled "FINAL SUMMARY OF ACHIEVEMENT SCORES" from the Office of Community Services, Department and Tobacco Office. The top form is highlighted with a red oval around the signature line. The form includes a table of scores and a signature line.

Criteria	Max	11/15/15	12/15/15	1/16/16
1. Organizational Profile	25	23	22	22
2. Project Summary and Abstract	50	29	23	28
3. Results or Benefits Expected	15	8	2	8
4. Needs and Objectives	10	8	3	8
5. Budget	20	18	18	18
Total	100	76	65	86
Average				86

Signature: _____ Date: _____
Priority Fee Waiver: _____ Date: _____

4. Repeat steps 1-5 for each application in your panel.
5. Mail in all signed Final Summary Reports with all other required closeout documentation.
6. This will complete your review for the grant program.

ARM CHAIRPERSON USER MANUAL

MANAGING YOUR ACCOUNT

You have the capability to personalize and update your usernames and passwords and manage your accounts accordingly. To manage your account, click the [My Account](#) link in the upper right corner of the screen.

Abbr	Agency List
OPHS	Office of the Assistant Secretary for Health

UPDATE ACCOUNT INFORMATION

You can update all account information as necessary. This includes First Name, Last Name, City, Zip Code, and State.

1. On the Account screen, click the **Update Account Information** button.

System User ID:	24567
Name:	Octavia Carter
Login Name:	OCarter8
Address:	Columbus DC 43407 Email: bh21sample@noemail.com

2. Enter the updated information in the appropriate field, and click the **Submit** button.

Update Account Information

First Name*:

Last Name*:

City*:

Zip Code*:

State*:

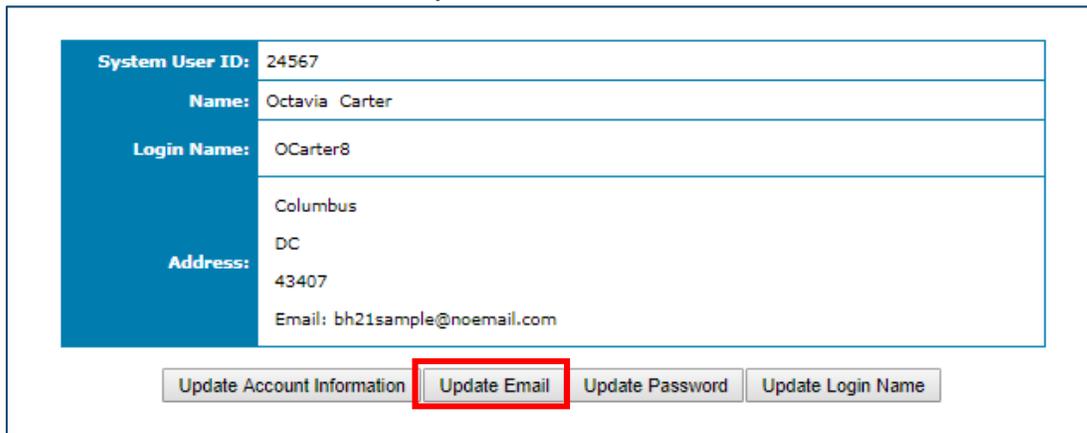
All fields marked with * are required.

ARM CHAIRPERSON USER MANUAL

UPDATE EMAIL

You also have the option to update the email address associated with your account. If you update your email address, all communication from the ARM system will be sent to the new email address. **Note:** For returning ARM reviewers, please be sure that you provide the currently registered email address to the Session Administrator (SA) when contacted about acting as a reviewer for a new program.

1. On the Account screen, click the **Update Email** button.

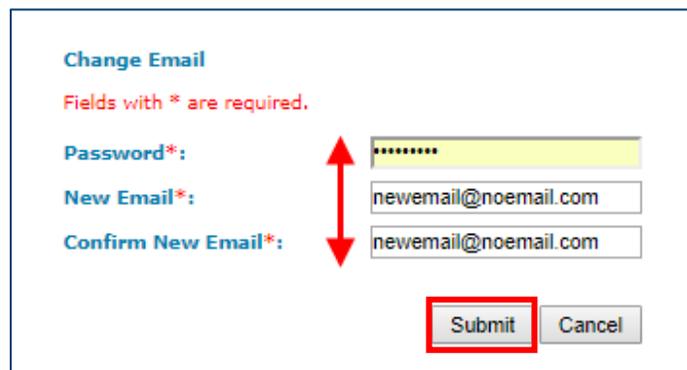


The screenshot shows a user profile form with the following details:

System User ID:	24567
Name:	Octavia Carter
Login Name:	OCarter8
Address:	Columbus DC 43407 Email: bh21sample@noemail.com

Below the form are four buttons: "Update Account Information", "Update Email" (highlighted with a red box), "Update Password", and "Update Login Name".

2. Enter your password, your new email address, confirm the new email address, and finally click the **Submit** button.



The "Change Email" form includes the following fields and instructions:

- Change Email**
- Fields with * are required.
- Password*:** [password field]
- New Email*:** [newemail@noemail.com]
- Confirm New Email*:** [newemail@noemail.com]

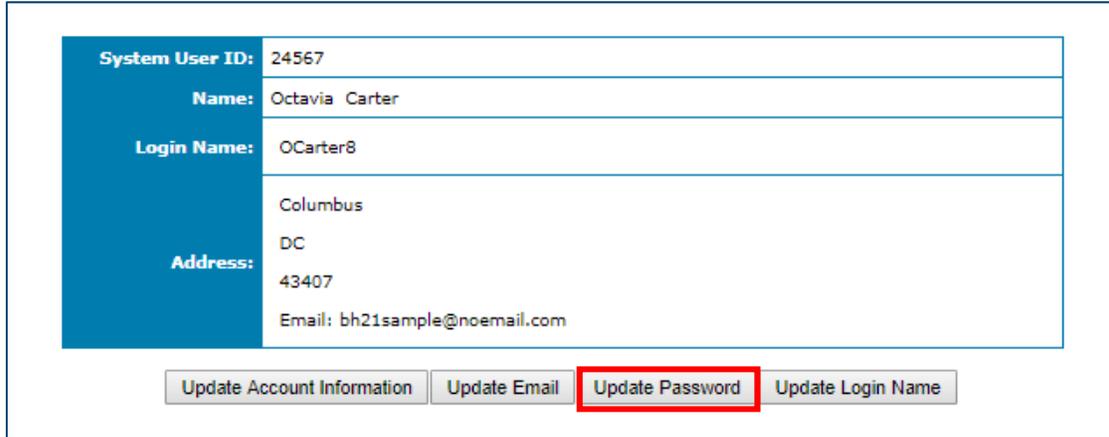
At the bottom are "Submit" and "Cancel" buttons, with "Submit" highlighted by a red box. A red double-headed arrow is positioned between the Password and New Email fields.

ARM CHAIRPERSON USER MANUAL

UPDATE PASSWORD

You can update your password at any time.

1. On the Account screen, click the **Update Password** button.

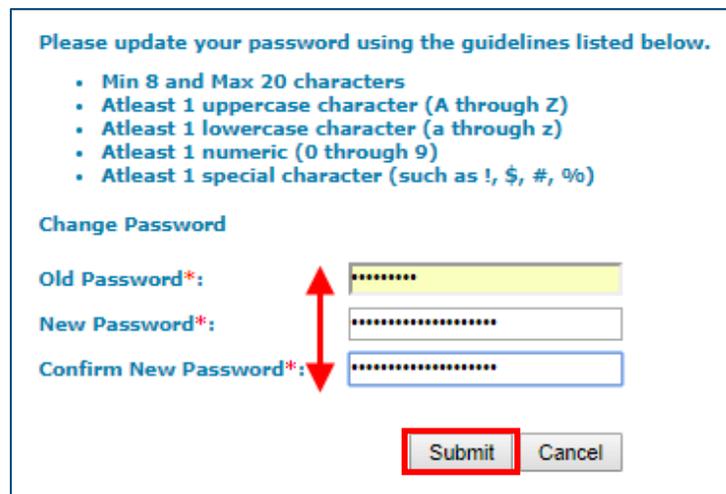


The screenshot shows a user profile form with the following details:

System User ID:	24567
Name:	Octavia Carter
Login Name:	OCarter8
Address:	Columbus DC 43407 Email: bh21sample@noemail.com

Below the form are four buttons: "Update Account Information", "Update Email", "Update Password" (highlighted with a red box), and "Update Login Name".

2. First, enter your old password, then (following the guidelines) enter and confirm your new password and click the **Submit** button.



Please update your password using the guidelines listed below.

- Min 8 and Max 20 characters
- Atleast 1 uppercase character (A through Z)
- Atleast 1 lowercase character (a through z)
- Atleast 1 numeric (0 through 9)
- Atleast 1 special character (such as !, \$, #, %)

Change Password

Old Password*:

New Password*:

Confirm New Password*:

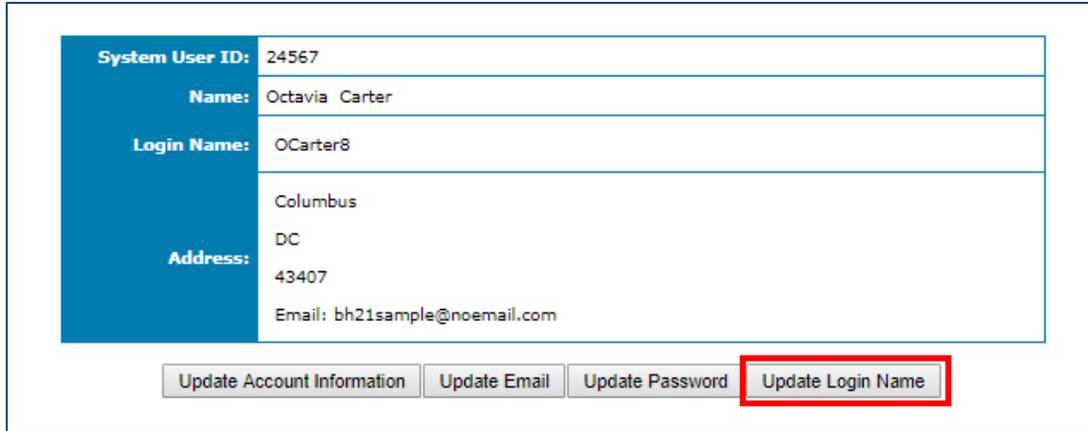
Submit Cancel

ARM CHAIRPERSON USER MANUAL

UPDATE LOGIN NAME

You have the option to update your username at any time. **Note:** If the username you select is already assigned, you will need to enter an alternate username.

1. On the Account screen, click the **Update Login Name** button.

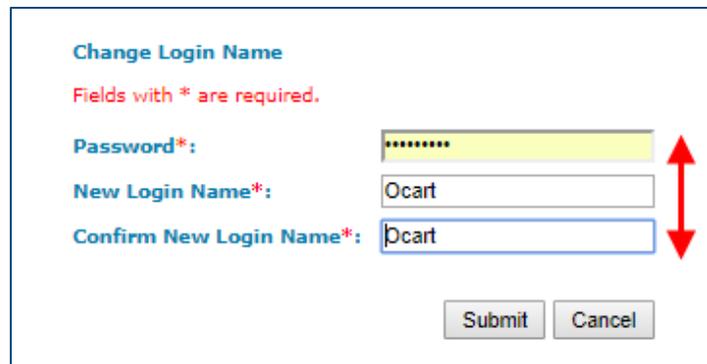


The screenshot shows a user account profile with the following details:

System User ID:	24567
Name:	Octavia Carter
Login Name:	OCarter8
Address:	Columbus
	DC
	43407
	Email: bh21sample@noemail.com

At the bottom, there are four buttons: "Update Account Information", "Update Email", "Update Password", and "Update Login Name". The "Update Login Name" button is highlighted with a red border.

2. Enter your password, your new username, confirm the new username, and finally click the **Submit** button.



The "Change Login Name" form includes the following fields and instructions:

- Change Login Name** (Section Header)
- Fields with * are required.** (Instruction)
- Password*:** A text input field containing "*****".
- New Login Name*:** A text input field containing "Ocart".
- Confirm New Login Name*:** A text input field containing "Ocart".
- Submit** and **Cancel** buttons.

A red double-headed vertical arrow is positioned to the right of the password, new login name, and confirm new login name fields, indicating that these three fields are required.

THANK YOU

This concludes the Chairperson User Manual for the Application Review Module. Thank you for using ARM.