

# Conducting a Pre-review

This document is for the PPHS Analyst who is conducting a pre-review of a protocol. *The pre-review happens after the submission has passed the rejection process.*

The non-committee reviewers and Board members will not be assigned a submission until it passes pre-review. If you are assigning a non-committee reviewer (for an expedited submission) or sending to the full board, use the instructions for those processes instead of these instructions.

1. A task appears on your To Do List. Notice that the task says **Review and Route...**; it does not say **MACRO** or **MICRO**. Because offices have not been assigned yet, there is no MACRO or MICRO yet.
2. Click into the **Review and Route...** task.
3. From the **Action** drop-down menu, select **Assign Offices** and then **Submit**.
4. This creates a MACRO and a MICRO task on your To-Do List.
5. The system should put you into the micro review task. You will know you are in the task when you see the heading **Process Review: PPHS/Micro**. If you are not taken to the micro review task, click into the micro task from your to do list.
6. Click through the submission, leaving review comments at the field level wherever needed.
7. As you leave comments, they are summarized under the **Comments** tab.
8. You can also leave general comments in the **General Comments** field, although field-level comments are preferred and should be used whenever possible.
9. When you finish leaving comments, from the drop-down on the left select **Setup Review**.
10. The **Review Dashboard** tab displays. Click the **Add Review** button.
11. A new row is added to the review history. You know that this row is yours because it is preceded by a red **X**. That row should automatically expand. If it doesn't, click the check box at the right end of the row to expand it.
12. Select a **Review Type** of **Administrative**.
13. Select a **Review Process** of **Administrative**.
14. Select a **Motion**. *Note that you are not adding a reviewer.* Do not click the Add Reviewer button. If you were adding a reviewer, this would not be a pre-review; it would be an expedited or full board review.
15. A red **Set Result** button should appear. Click it.
16. On the left, a blue **Develop Response Submission** buttons appears. Click it.
17. You now have a second chance to change the comments that you just left. When you are satisfied with those comments, click the blue **Submit** button.
18. The MICRO task is removed from your to do list.
19. If the PPHS was the only office reviewing this submission, the MACRO task will now display a notification saying **Micro Office Reviews Complete**. If other offices were assigned, you must wait for them to complete their reviews.
20. When you do receive the notification **Micro Office Reviews Complete**, leave that notification there until you are ready to process the MACRO. When you are ready, click into the notification and click the **Exit** button.
21. The **Micro Office Reviews Complete** notification is removed from your todo list. Immediately, you should click into the MACRO task for this submission.
22. The submission displays. You know that you are in the macro task because the page heading reads Process Review: PPHS/Macro. You know that all the micro reviews are complete because it displays a message in green saying **All Micro Office reviews are complete. Please add a Review ...**

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23. From the **Action** drop-down menu, select **Setup Review**.
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25. A new row is added to the review history. You know that this row is yours because it is preceded by a red **X**.
26. That row should automatically expand. If it doesn't, click the check box at the right end of the row to expand it.
27. Select a **Review Type** of **Administrative**.
28. Select a **Review Process** of **Administrative**.
29. Select a **Motion**. *Note that you are not adding a reviewer.* Do not click the Add Reviewer button. If you were adding a reviewer, this would not be a pre-review; it would be an expedited or full board review.
30. A red **Set Result** button should appear. Click it.
31. On the left, a blue **Develop Response Submission** buttons appears. Click it.
32. You now have a chance to change the comments that you *and the conditional offices* left during their MICRO reviews. When you are satisfied with those comments, click the blue **Submit** button.
33. The MACRO task is removed from your to do list.