A New Checklist Tool to Enhance Documentation, Standardization, and Training for Program Officers

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PROJECT BACKGROUND & GOALS

- Program Officers (POs) fill out checklists for each application in their portfolio of extramural research grants
  - Facilitate easier searching through up to 100 pages or more of grant documents
  - Provide documentation of the textual evidence on which a PO based their answers
  - Provide standardized training for checklist completion

→ Goal: Develop a tool to organize, standardize, and document the process of filling out a program checklist that can also be used for training.

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PROCESS

- Iterative development incorporating feedback from Program Officers and policy experts
- New features progressively implemented – table of contents, interactive links, comment fields
- Used Python + PDF processing libraries to write tool to process grant documents, perform simple text searches, and compile aggregate output PDF

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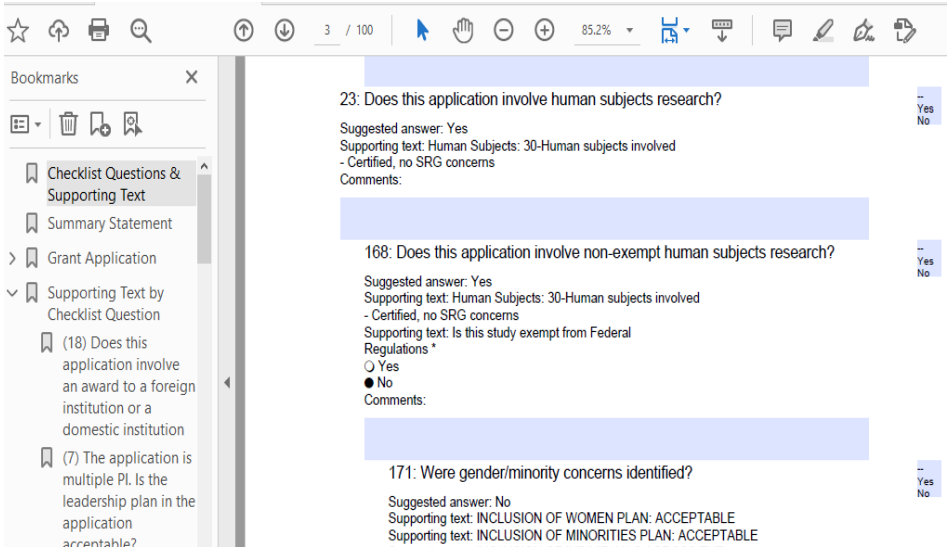
PRODUCT

- Final product includes:
  - All pieces of supporting textual evidence for each question
  - Interactive table of contents
  - Documentation of PO comments and answers
  - Optional semi-automated answer suggestion feature



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IMPACT

- Semi-automation feature shows 96% accuracy in preliminary analysis
- Efficiency gains of 5 – 10 minutes per grant **x** up to 100+ grants per portfolio
- Robust documentation of textual evidence for checklist questions
- Standardized checklist answering process
- Standardized training tool for new POs

What's next? Large scale testing, expansion of answer suggestion capabilities, and hopefully NIH-wide integration.

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