**2014 Step-by-Step Instructions for Tech Editing**, **Part 1**

1. **Call or e-mail the team leader to introduce yourself.** Remind the team leader that your role is to be an advocate for the applicant (not a member of the team; therefore, you will not be doing an independent review of the application). Just prior to the team’s consensus call, you will provide in-process feedback on how the draft scorebook may be perceived by the applicant. The team leader can choose how to share that feedback with the team.
2. **Read the Organizational Profile of the team’s application** (and additional sections only if time allows).
3. **Scan\* categories 1 through 7 of the team’s draft Consensus Review Scorebook** (the R-3/pre-consensus-call version); in scanning the team’s draft items, focus on **three** areas:
   * Comments that conflict with each other (or may sound to the applicant like they do)
   * Alignment of comments with scoring
   * Consideration of applicant’s view (e.g., might comments appear to be harsh/prescriptive/deny benefit of the doubt?)

**\***In part 1, tech editors are not expected to check application data or thoroughly check all comments for adherence to the Criteria requirements and Comment Guidelines; this review is intended as a relatively high-level in-process check on whether the scorebook is likely to meet applicant expectations for high-quality feedback.

1. **Review the key themes**, checking whether they generally appear to align with the scoring bands and reflect item-level scores and bolded comments in the rest of the scorebook.
2. **Share your input with the team leader (and possibly the entire team)**. Do this by first calling the team leader and giving feedback verbally and discussing what (if anything) to put in writing for the team to view; next you may upload (if appropriate) constructive feedback in writing for the team. Please ensure that you provide at least some input to the team leader based on your review in order to advance the team’s learning and/or sense of its progress. Please aim to provide a balance of observations about the key strengths and opportunities for improvement you see in the team’s work so far; use a professional, encouraging tone when describing any critical issues that may need the team’s attention in order to ensure a high-quality scorebook for the applicant.
3. **Return the application** when requested; detailed instructions will be provided.

**Notes:**

* The majority of tech editors have found that it is *not* a beneficial use of their time to be silent observers on teams’ consensus calls; therefore, it is optional (not recommended) for tech editors to listen to these calls.
* Time is limited during this part 1 phase, so it is suggested that tech editors focus on three areas: apparent conflicts among strength and OFI comments, alignment of comments with scoring, and tone; if a tech editor finds additional time, he she may want to more closely read comments to ensure that none go beyond the scope of Criteria requirements and that all conform to the Comment Guidelines.