PCORI Online Cheat Sheet:
Application Submission

Important Reminders

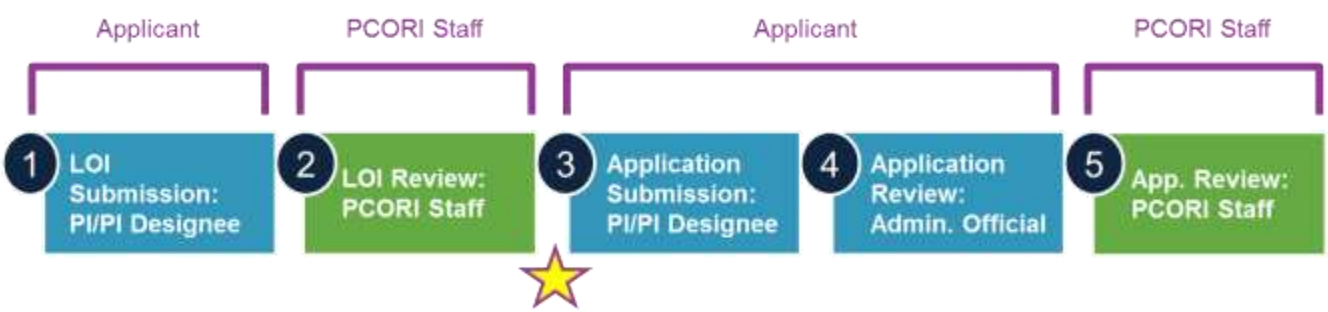
This Cheat Sheet provides guidance on how to:

- Navigate to an Application
- Update and Submit the Application for AO Approval
- Approve the Application and Submit to PCORI

Please keep in mind the following user roles:

User Role	Definition
Principal Investigator (PI)	Institution's **primary Point of Contact (POC)** throughout the lifecycle of the project, from LOI submission to project completion; is responsible for the programmatic conduct of the project.
PI Designee	An individual selected by the Principal Investigator (PI)/ Project Lead (PL) to act as a **backup or alternate**.
Administrative Official (AO)	Responsible for the **proper administration** of the contract, including approving the Application submission, overseeing contract modifications, and other required materials.

LOI and Application Process: The image below illustrates the LOI and Application Submission and Review process. Applying for funding from PCORI is a two-stage process. A Letter of Intent (LOI) must be submitted before an organization is invited to submit a full Application. Please keep this process in mind while reviewing the steps below.



Application Submission & Approval

Navigate to the Application

If your LOI has been approved and you are invited to submit a full Application, PCORI has created a draft Application in PCORI Online, pre-populated with the information in the LOI. Navigate to the draft to get started.

1.	Log-in to PCORI Online.
2.	Click on the **PCORI Research and D&I Awards** tile (i.e. '**Click here to Get Started**').
3.	Click on '**My LOIs and Applications**' to navigate to the Application Dashboard.
4.	On the left-side menu, click on '**Applications**.'
5.	Search for the draft Application you would like to edit, and click the **Edit** button.

The following seven tabs have been pre-populated from the LOI submission and are designated (LOI):

- Contact Information (LOI)
- Pre Screen Questionnaire (LOI)
- Resubmission Questions (LOI)
- PI Information (LOI)
- Project Information (LOI)
- Project Personnel (LOI)
- Project Personnel Partners (LOI)

For further guidance on these tabs, please reference the LOI Submission Cheat Sheet. Please note that any changes to the following information from the LOI submission will require PCORI's written approval prior to Application submission:

- Principal Investigator
- Institution
- Study design
- Research question(s)
- Specific aims
- Comparators

If you need to change any of this information or have any questions, reach out to pfa@pcori.org.

Update and Submit the Application for AO Approval

Once you have navigated to the Application, you can enter the requested information in the following tabs. It is highly encouraged that you complete these tabs in the order they appear.

Pre-Populated LOI Submission Tabs (Tabs 1-7)	
1.	Review the pre-populated tabs from your LOI Submission (listed above).
2.	Any changes to the information listed above will require PCORI's written approval prior to Application Submission. If you need to change any of this information or have any questions, please reach out to pfa@pcori.org.

<table>
<tr><td>3.</td><td>On the last Pre-Populated Tab (Project Personnel Partners), click ‘Save & Next’ to advance to the Budget tab.</td></tr>
<tr><td colspan="2">Project Information Tab</td></tr>
<tr><td>1.</td><td>Enter/confirm the Projected Start Date and Projected End Date of your project.</td></tr>
<tr><td>2.</td><td>Enter the Technical Abstract, Public Abstract, and Project Narratives.</td></tr>
<tr><td>3.</td><td>Complete the remaining fields through open-ended questions, drop-down menus, and multi-select lists.</td></tr>
<tr><td>4.</td><td>Click ‘Save & Next’ to advance to the next tab.</td></tr>
<tr><td colspan="2">Budget Tab

The Budget Tab consists of the following eleven pages:
Personnel, Consultant Cost, Supplies, Scientific Travel, Programmatic Travel, Other Travel, Equipment, Subcontractor Direct Costs, Subcontractor Indirect Costs, Detailed Budget – Total Indirect Costs, Budget Summary</td></tr>
<tr><td>1.</td><td>To begin editing Budget Tables, click Create New Budget which will open the first page, Personnel Budget Tables.</td></tr>
<tr><td>2.</td><td>Enter Start Date and End Date (365 days later) for each year of your proposed project. Once complete, click ‘Save All Rows.’

Note: Even if your proposed project is less than 5 years, you must populate a date value for the ‘Start Date’ and ‘End Date’ fields for all years.</td></tr>
<tr><td>3.</td><td>Click ‘Add Row’ to enter budget details related to the first personnel.</td></tr>
<tr><td>4.</td><td>Enter all fields: Name, Key Personnel, Role on Project, Percent Effort (%), Calendar Months, Inst. Base Salary, Salary Requested and Fringe Benefits.</td></tr>
<tr><td>5.</td><td>Click ‘Save Rows’ when you have finished editing.</td></tr>
<tr><td>6.</td><td>To add additional Project personnel, click ‘Add Row’ again and repeat steps 4-5.</td></tr>
<tr><td>7.</td><td>To copy these personnel details to all project years, select applicable rows and click ‘Copy Selected Rows To All Years.’</td></tr>
<tr><td>8.</td><td>To delete, select the applicable personnel row and click ‘Delete Selected Rows’ to remove.

Note: If your proposed project is less than 5 years, be sure to delete any auto-populated rows after your proposed project End Date.</td></tr>
<tr><td>9.</td><td>Click ‘Save All Rows’ before navigating to Next Page.</td></tr>
<tr><td>10.</td><td>Click ‘Next Page’ to proceed to the next Budget page, Consultant Cost.</td></tr>
<tr><td>11.</td><td>Repeat steps 3-10 to update the remaining Budget pages.</td></tr>
<tr><td>12.</td><td>Note that the Detailed Budget – Total Indirect Costs page has a different format. Enter ‘Total Prime Indirect Cost’ and 'Applicable Rate’ for each year.

Note: If your proposed project is less than 5 years, you must enter ‘0’ for cost and rate for all remaining years after your proposed project End Date.</td></tr>
</table>

13.	Click ‘**Save**’ and ‘**Next Page**’ to navigate to the Budget Summary.
14.	On the **Budget Summary** page, review all information for accuracy. In Year 6 (Peer Review Period), some costs are grayed out as they are not applicable. **Subtotals** and **Totals** are automatically calculated.
15.	When you are ready to proceed, click the **Project Information** tab.
Milestones Tab	
1.	On the Milestones tab, click ‘**New**’ to add a new Milestone record.
2.	Enter the Milestone **Name**, **Description**, and **Due Date**.
3.	Click ‘**Save**’ to save the new Milestone record, and you will return to the Milestones tab.
4.	To ‘**Delete**,’ ‘**Edit**,’ or ‘**View**’ existing Milestone records, navigate to the ‘Action’ column and click the applicable button.
5.	To add additional Milestones, click ‘**New**’ again and repeat steps 1-4.
6.	To navigate to the next tab, click ‘**Next**.’
Templates & Uploads Tab	
1.	Download the Application templates.
2.	To upload the completed templates, click ‘**Choose file**’ to select a file from your computer, and click ‘**Upload**.’
3.	Click ‘**Save**.’
4.	When you have completed the Application and are ready to submit, click ‘**Review/Submit**.’
5.	You will be taken to **the read-only view** of the Application.
6.	When you have fully reviewed the Application and are ready to submit to the AO for approval, click ‘**Submit**.’
Certification Tab	
1.	Read the statement at the top of the page.
2.	Select ‘**Yes**’ from the drop-down menu under ‘I Agree.’
3.	Click ‘**Save**.’
4.	When you have completed the Application and are ready to submit, click ‘**Review/Submit**.’
5.	You will be taken to **the read-only view** of the Application.
6.	When you have fully reviewed the Application and are ready to submit to the AO for approval, click ‘**Submit**.’

Approve the Application and Submit to PCORI

Once the Application is submitted for internal approval, the Administrative Official (AO) can log-in to PCORI Online to review and approve the Application.

1.	Navigate to the **Open Items** on the Application Dashboard, and locate the Application that is **Submitted**.
2.	Review the read-only version of the submitted Application by clicking on the magnifying glass button.
3.	Click on the icon under **AO Approve/Withdraw** to Approve, Reject, or Withdraw the submitted Application.
4.	Read the statements in the bulleted list at the top of the **AO Approval/Withdraw** page.
5.	Select ‘**Yes**’ or ‘**No**’ from the drop-down menu under ‘I Agree.’
6.	Use the drop-down menu under ‘AO Approval’ to **Approve** or **Reject** the Application. ***Note**: If you would like to withdraw the Application, use the second drop-down menu to select ‘Withdraw’ and enter Withdrawal Reason(s). Please note that you can withdraw the Application at any time.*
7.	When you have completed your review of the Application and entered a decision, click ‘**Save**.’
8.	When you are ready to submit the Application to PCORI, click ‘**Review/Submit**.’
9.	You will be taken to a **read-only view** of the AO Decision. When you are ready to submit the Application to PCORI, click ‘**Submit**.’