



**PCORI Online: Merit Reviewer  
User Guide for Indicating COI  
and Expertise**

Patient-Centered Outcomes Research Institute

## Complete COI & Expertise

If you have been approved to be a Reviewer and invited to potentially serve on a Merit Review panel, you will receive an email notification from a PCORI Merit Review Officer (MRO). In this email, you will be asked to navigate to PCORI Online to first confirm that you do not have any panel-level conflicts of interest (COIs), and then to self-report your expertise and potential COIs for specific applications on the panel. Our aims are to match applications to the expertise or experience of our reviewers and to develop a balanced panel that is representative of our diverse patient and stakeholder communities.

In both the preliminary Online Review and the In-Person Review phases, Reviewers access their assigned Applications through the Reviewer Dashboard in PCORI Online. In this online portal, Reviewers provide critiques and score Applications based on PCORI's Merit Review criteria. They also evaluate Human Subjects Protections and adherence to the [PCORI Methodology Standards](#).

*This section provides guidance on how to:*

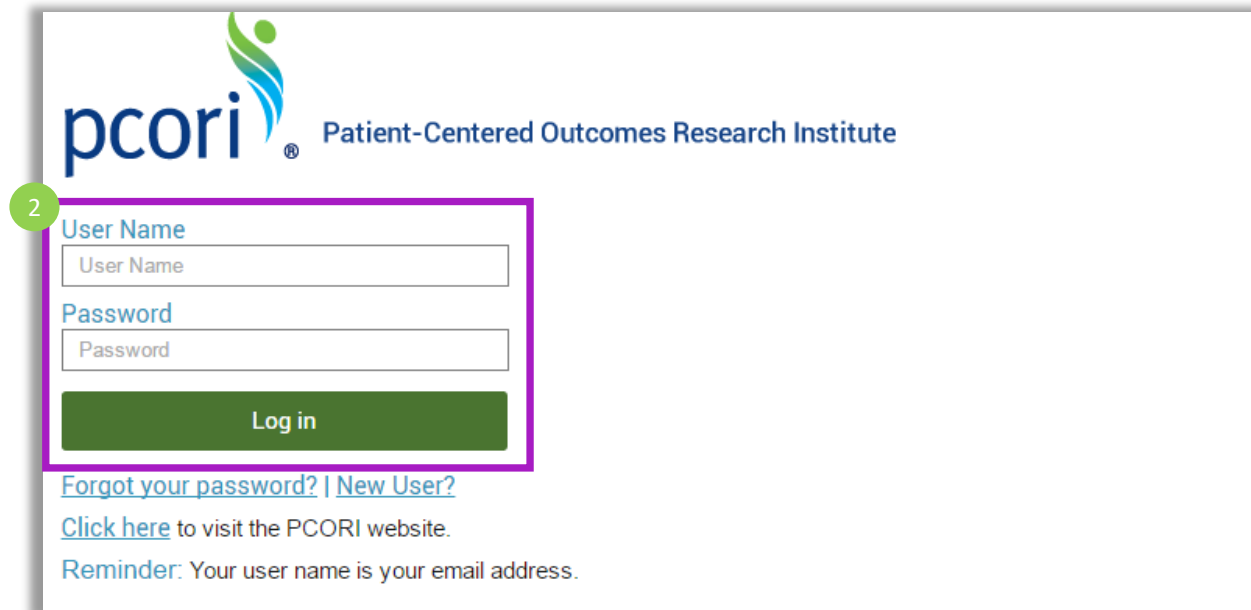
- Complete Panel-level COI
- Complete COI & Expertise Forms

## Complete Panel-level Conflict of Interest (COI)

Prior to being assigned Applications to review, you must first complete all COI & Expertise Forms. Upon logging in to PCORI Online, you will be asked to first confirm that you do not have any panel-level conflicts of interest (COIs), and then asked to self-report your expertise and potential COIs for specific applications on the panel. There will be a COI & Expertise Form for each Application on the panel you have been invited to potentially serve.

If you have been asked to indicate Conflicts of Interest and Expertise for applications on a Merit Review panel, first navigate to the Reviewer Portal through PCORI Online to get started.

1. Navigate to the PCORI Online home page (<https://pcori.force.com/engagement>).
2. Enter your User Name and Password, and click 'Log in.'



pcori Patient-Centered Outcomes Research Institute

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User Name

Password

Log in

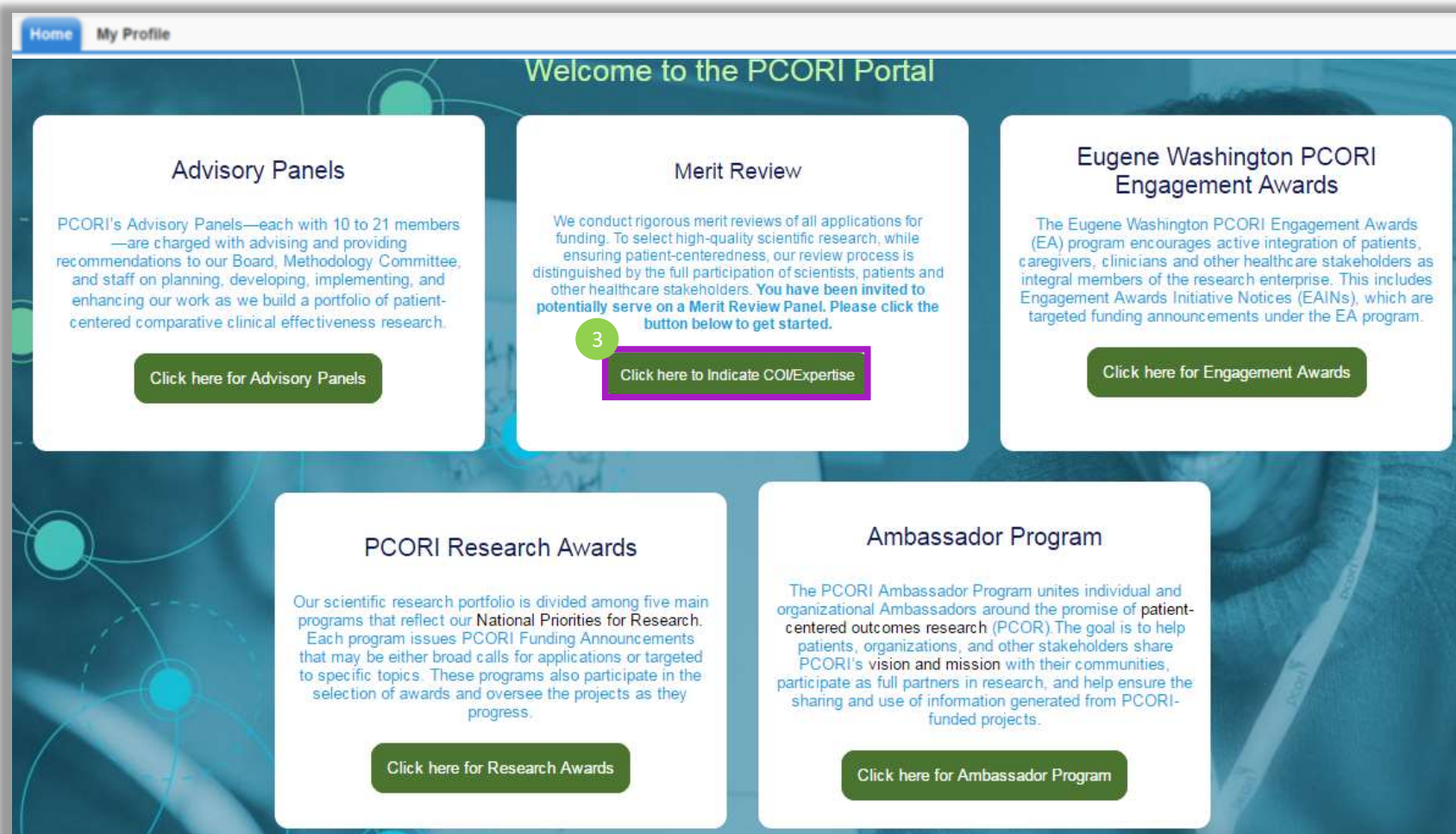
[Forgot your password?](#) | [New User?](#)

[Click here](#) to visit the PCORI website.

Reminder: Your user name is your email address.

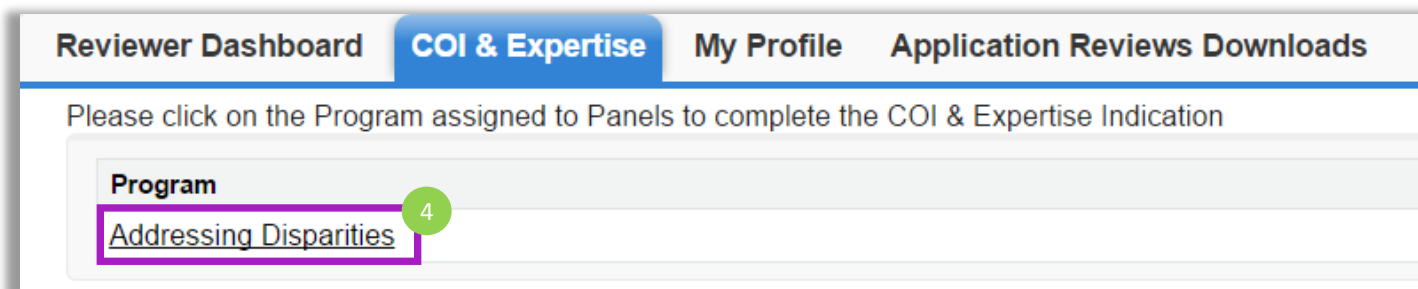
**Note:** If you have forgotten your password, navigate to the [Appendix](#) for further instructions.

- Once logged in, you will be directed to the PCORI Online home page. All Merit Review tasks will be completed in this system. To access the Merit Review Dashboard click the **Merit Review** tile. The text of the Merit Review button will reflect the current outstanding task for the Merit Reviewer. At this step, the button text is '**Click here to indicate COI/Expertise.**'



**Note:** To return to this page at any point, click the **Home** tab in the top left corner.

- Click on the **Program** link to complete the COI & Expertise (e.g. 'Addressing Disparities,' as shown in example below).



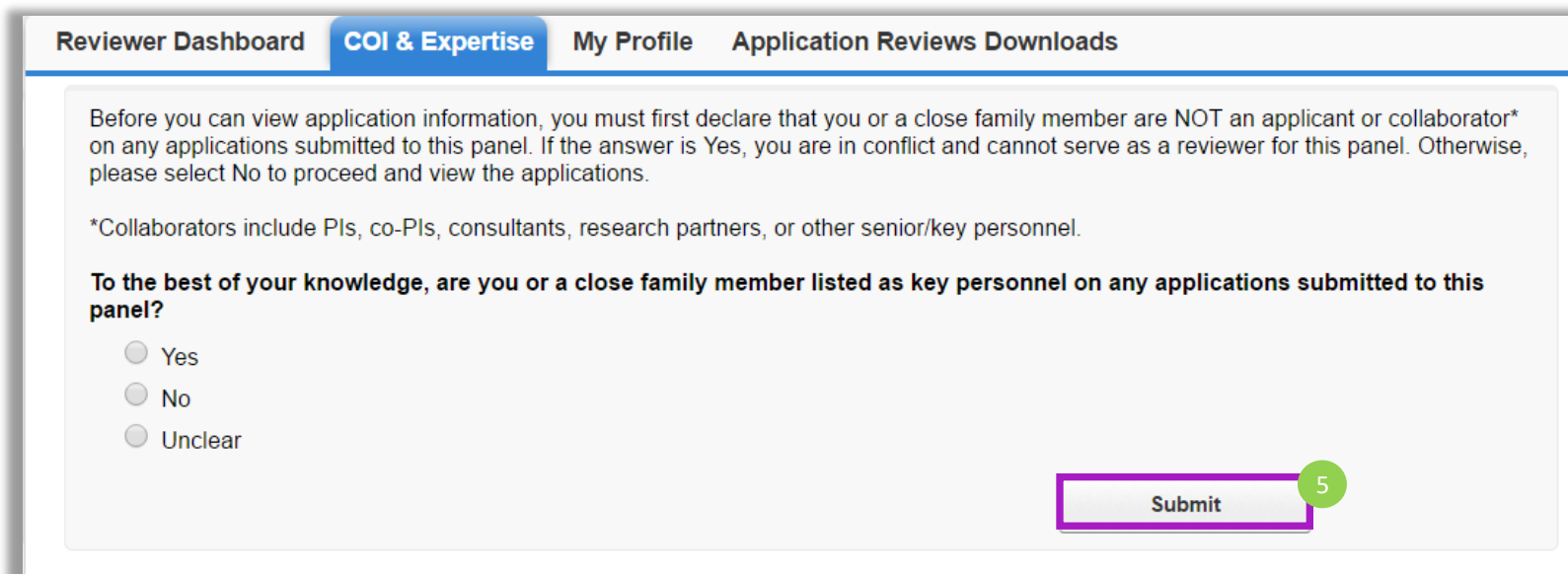
Reviewer Dashboard **COI & Expertise** My Profile Application Reviews Downloads

Please click on the Program assigned to Panels to complete the COI & Expertise Indication

Program

Addressing Disparities 4

- Provide a response to the **panel-level COI** question and click '**Submit.**'



Reviewer Dashboard **COI & Expertise** My Profile Application Reviews Downloads

Before you can view application information, you must first declare that you or a close family member are NOT an applicant or collaborator\* on any applications submitted to this panel. If the answer is Yes, you are in conflict and cannot serve as a reviewer for this panel. Otherwise, please select No to proceed and view the applications.

\*Collaborators include PIs, co-PIs, consultants, research partners, or other senior/key personnel.

**To the best of your knowledge, are you or a close family member listed as key personnel on any applications submitted to this panel?**

☐ Yes

☐ No

☐ Unclear

**Submit** 5

## Complete Conflict of Interest (COI) & Expertise Forms

If you do not have a Panel-level Conflict of Interest, you will be directed to complete Application-level COIs.

1. Click the **COI & Expertise Number** to open the record and make updates.

| Reviewer Dashboard   COI & Expertise   My Profile   Application Reviews Downloads |                           |                        |                                 |                        |
|---|---------------------------|------------------------|---------------------------------|------------------------|
| COI & Expertise   |                           |                        |                                 |                        |
| Action  | Name                      | Principal Investigator | Program Organization            | Program                |
| <a href="#">Edit</a>  | <a href="#">COI-84462</a> | Katie Velez            | Center for MS                   | Addressing Disparities |
| <a href="#">Edit</a>  | <a href="#">COI-84463</a> | Alex Stanley           | Group Health Research Institute | Addressing Disparities |
| <a href="#">Edit</a>  | <a href="#">COI-84464</a> | William Roth           | Science Foundation              | Addressing Disparities |
| <a href="#">Edit</a>  | <a href="#">COI-84465</a> | Yvonne Conrad          | Cancer Research Inc.            | Addressing Disparities |
| <a href="#">Edit</a>  | <a href="#">COI-84466</a> | Faith Oaks             | Stone Ridge College             | Addressing Disparities |

2. Review the **COI Information**, **COI Policy**, and **Non-Disclosure Agreement** located at the top of the page.

| Reviewer Dashboard   COI & Expertise   My Profile   Application Reviews Downloads  |  |
|--|--|
| <div> <div>Conflicts of Interest &amp; Expertise</div> <p>For a definition and examples of COIs, details about expertise, and our nondisclosure agreement, please read the documents below. By clicking "Submit" after you have addressed the COI and expertise sections, you are acknowledging compliance with all PCORI terms and policies disclosed in these documents:</p> <div> <a href="#">Information for PCORI Merit Reviewers on Confidentiality, Conflict of Interest, and Rating Expertise</a><br/> <a href="#">PCORI Conflict of Interest Policy</a><br/> <a href="#">PCORI Non-Disclosure Agreement (Reviewer)</a> </div> <p>In the sections below, please identify any potential conflicts of interest (COIs) you have with this research proposal and specify your level of expertise with the subject matter.</p> </div> |  |



3. Scroll down to **Conflict of Interest Disclosure** section to review the Application information, including **Project Title**, **Principal Investigator**, and **Application Key Personnel**.
4. In the **Conflict of Interest Disclosure** section, indicate any COI with the Application information above.
  - a. If you do not have a COI, select 'No.'
  - b. If you have a COI, select the COI statement that best applies.
  - c. If you are unsure whether your situation qualifies as a COI, please select '**Unclear**' and explain the potential conflict. Your MRO will review the potential conflict and let you know if a COI exists.

Conflict of Interest Disclosure

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Please look closely at the following application information to determine whether you have a COI. Refer to the documents above for details about COIs.

|                        |   |
|------------------------|---|
| Project Title          | Identifying Innovative Approaches to Patient Engagement |
| Principal Investigator | Katie Velez   |

Application Key Personnel

| First Name | Last Name | Institution/Org | Role                    | Role (Other) |
|------------|-----------|-----------------|-------------------------|--------------|
| Katie      | Velez     | Center for MS   | Principal Investigator  |              |
| Tim        | Roberts   | Center for MS   | Administrative Official |              |

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Do you have any of the following types of Conflicts of Interest with this application?

Please select all that apply. If you do not have a COI, select "No." If you are unsure whether your situation qualifies as a COI, select "Unclear" and type a description of the potential COI in the box. Selecting "Unclear" will generate an automatic notification for your Merit Review Officer, who will review your information and provide guidance.

- ☐ No-The reviewer has no COI with this application.
- ☐ Yes-The reviewer has a personal COI: The reviewer or his/her close relative has a significant personal relationship with the principal investigator or a key personnel.
- ☐ Yes-The reviewer has a professional COI: The reviewer or his/her close relative has a significant professional relationship (employment related or not) with the principle investigator or key personnel.
- ☐ Yes-The reviewer has an institutional COI: The reviewer or his/her close relative is employed by or seeking employment at the applicant entity, or the reviewer may receive professional gain or advancement as a direct result of the application funding decision.
- ☐ Yes-The reviewer has a financial COI: The reviewer or his/her close relative could receive a financial benefit as a result of the application funding decision.
- ☐ Unclear if COI Exists.

5. Scroll down to Expertise Rating section and review the **Instructions** and **Technical Abstract**.
6. Select the applicable **Expertise Level**.
7. Click '**Submit**.'

**Expertise Rating**

Below are descriptions for each level of expertise. Scientist reviewers are expected to rate their level of expertise. Patients and stakeholders are encouraged to rate their level of expertise or may choose not to designate a level of expertise by selecting "None or Not Applicable."

|                               |   |
|-------------------------------|---|
| <b>High</b>                   | The Reviewer is able to evaluate the application with little or no need to make use of background material or the relevant literature. The Reviewer has likely published in areas closely related to the science presented in the application.  |
| <b>Medium</b>                 | The Reviewer has most of the knowledge to evaluate the application but will require some review of relevant literature to fill in details or increase familiarity with the system employed. The Reviewer may employ similar methodologies in his or her own work but may need to review the literature for recent data relevant to the application. |
| <b>Low</b>                    | The Reviewer understands the broad concepts but is unfamiliar with the specific methodology or other details, and reviewing the application would require considerable preparation.   |
| <b>None or Not Applicable</b> | The Reviewer has only superficial or no familiarity with the concepts and methodology described in the application, or the Reviewer chooses not to answer the question about his/her expertise.   |

**Please read the technical abstract shown below and identify your level of expertise with the proposed research.**

Technical Abstract

Overall study design: The main objective of this study is to assess the comparative benefits and harms of complementary health and wellness approaches on symptoms of fatigue and emotional changes in progressive forms of MS compared to pharmacologic approaches. The study consists of Part A and Part B and will be conducted over 36 months. Part A): RCT of MS specialist nurse monitored interactive televideo yoga is used by patients (group 2) at home supported by a HIPAA approved telemedicine platform, [Doxy.me](#) vs. MS specialist nurse monitored pharmacologic management delivered by [Doxy.me](#) platform (group 2) in patients with progressive vs a sham meditation (Group 3) with [Doxy.me](#) monitoring by MS specialist nurses (N=500). The trial will focus on improving fatigue and emotional changes measured at baseline and will take place over 12 weeks with blinded assessments at baseline, six weeks, and 12 weeks and a post intervention assessment at 16 weeks; Part B) Mixed methods approach to collecting data that includes surveys and focus groups to examine barriers and explore the feasibility of various solutions to implementation of yoga in routine clinical care.

**Expertise Level**

☐ None or Not applicable  
☐ Low  
☐ Medium  
☐ High

**Submit**



8. After the page refreshes, repeat steps 6-12 for **all** remaining **COI & Expertise Forms** in the list view.
9. Once you complete a COI & Expertise form, it will be removed from your list view. When no COI & Expertise Forms remain in the list, you have completed all COI & Expertise Forms.

Reviewer Dashboard

COI & Expertise

My Profile

Application Reviews Downloads

COI & Expertise

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| Action | Name | Principal Investigator | Program Organization | Program |
|--------|------|------------------------|----------------------|---------|
|--------|------|------------------------|----------------------|---------|

## Appendix

### A.1 Retrieve a Forgotten Password

1. Navigate to PCORI Online (<https://pcori.force.com/engagement>).
2. If you do not know or have forgotten your PCORI Online password, click '**Forgot your password?**' to retrieve it.
3. On the following screen, enter your username (i.e. your email address), and click '**Reset Password.**'
4. After submission, you will receive a system-generated email with instructions on how to reset your password.

The first screenshot shows the PCORI Online login page. It features the PCORI logo and the text 'Patient-Centered Outcomes Research Institute'. Below the logo are two input fields: 'User Name' and 'Password'. A green 'Log in' button is positioned below these fields. A green circle with the number '2' is placed next to the 'Forgot your password?' link, which is highlighted with a purple box. A 'New User?' link is also visible. Below the links, there is a line of text: 'Click here to visit the PCORI website.' and a reminder: 'Reminder: Your user name is your email address.'

The second screenshot shows the password reset page. It features the PCORI logo and the text 'Patient-Centered Outcomes Research Institute'. Below the logo is a 'Username' input field. A green circle with the number '3' is placed next to the 'Reset Password' button, which is highlighted with a purple box.