PCORI Merit Reviewer Manual
For PCORI Online

Updated June 23, 2015
Table of Contents

<table>
<thead>
<tr>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
</tr>
<tr>
<td>Using PCORI Online</td>
</tr>
<tr>
<td>Additional Information</td>
</tr>
</tbody>
</table>
Introduction

What’s New?

In January 2015, PCORI launched the Merit Reviewer Portal, a new system that will support steps in the Merit Reviewer process. As PCORI transitions to this new system, you will use two systems to support the application and review process: the PCORI Online system and the new Merit Reviewer Portal. The PCORI Merit Reviewer Manual is a valuable resource for both new and returning reviewers, and will serve as a guide to help reviewers navigate both systems.

Have a question? Please submit a request here.

Existing System:
PCORI Online

New System:
Merit Reviewer Portal
# Introduction

## When Will I Use Each System?

The table below displays which system reviewers will use for each step in the process. Additionally, PCORI representatives will communicate with you throughout the process to help guide and inform you on when to use each system.

<table>
<thead>
<tr>
<th>Step 1: Online Review</th>
<th>Step 2: Online Review</th>
<th>Step 3: In-Person Panel</th>
<th>Ongoing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicate Conflict of Interest (COI) &amp; Expertise</td>
<td>Review Your Assigned Applications</td>
<td>In-Person Panel Review</td>
<td>Update Your Contact Information</td>
</tr>
<tr>
<td>Indicate COI &amp; Expertise for your assigned research applications for the online review.</td>
<td>Review &amp; Critique your assigned research applications for the online review.</td>
<td>Score discussed applications at in-person meeting.</td>
<td>PCORI will request that you update your contact information.</td>
</tr>
</tbody>
</table>

**Note:** You will receive communications before each step, with guidance and instructions on which system to use.
Introduction

Will my User Name and Password Be the Same for Both Systems?

<table>
<thead>
<tr>
<th>User Name</th>
<th>Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>For your convenience, your email address will be your User Name for both systems.</td>
<td>Please establish the same password for both systems.</td>
</tr>
</tbody>
</table>

Please note, you will not be able to update your email address in either system.

If you need to change your email at any time, it is important that you submit a request here. Your User Name will then be updated in both systems.
Web Browser Requirements

What Browser Should I Use?

PCORI Online and the Merit Reviewer Portal are only compatible with Safari and Google Chrome browsers. We recommend not to use Internet Explorer.

Click here to download Chrome for PCs

Click here to download Safari for Macs

Have a question? Please submit a request here.
# Table of Contents

<table>
<thead>
<tr>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
</tr>
<tr>
<td><strong>Using PCORI Online</strong></td>
</tr>
<tr>
<td>How to Login</td>
</tr>
<tr>
<td>How to Review Your Assigned Applications for the Online Review</td>
</tr>
<tr>
<td>How to Review Your Assigned Applications for the In-Person Panel</td>
</tr>
<tr>
<td><strong>Reviewer Resources &amp; Contact Information</strong></td>
</tr>
</tbody>
</table>
An account has been created for you by PCORI. You will need to create a password by completing the following steps:

1. Using Chrome or Safari web browser go to: https://pcori.fluxx.io/
2. On the PCORI Online homepage, select the “Reset or create password” hyperlink.
3. You will be taken to a new page where you will enter your email address and select Submit.
How to Login

PCORI Online

Once you have completed steps 1 – 3, you will receive an email with your User Name and Password for PCORI Online.

Thank you for contacting the Patient-Centered Outcomes Research Institute (PCORI) Online system. In order to access the grant portal, you must use the Google Chrome browser or Safari, for Mac users.

You have been assigned the following user name and password, which will allow you to log on to the PCORI Online system at http://pcori.fluxx.io.

* User Name: login
* Password: password

PCORI Online has recently been updated to help better serve our applicants. Please contact us if you have any questions about our new system.
Should this screen appear when logging in, please select “Reviewer” and click “Continue” to log in and access your assigned applications.
## Table of Contents

<table>
<thead>
<tr>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
</tr>
<tr>
<td>Using PCORI Online</td>
</tr>
<tr>
<td>How to Login</td>
</tr>
<tr>
<td>How to Review Your Assigned Applications for the Online Review</td>
</tr>
<tr>
<td>How to Review Your Assigned Applications for the In-Person Panel</td>
</tr>
<tr>
<td>Reviewer Resources &amp; Contact Information</td>
</tr>
</tbody>
</table>
Once you have logged into PCORI Online, you will be taken to the Application page.

The applications assigned to you will appear as hyperlinks under Requests.

If you don’t see all of the applications listed please click the page navigation buttons.
How to Access Assigned Applications

**PCORI Online**

To access your applications:

1. Click on the hyperlink and you will be taken to the specific Application page, where you can review the full application.
As you scroll through the Application page, the following information is displayed:

- PI and Contact Information
- Project Information
- Key Personnel
- Milestones
- Requirements
- Templates and Uploads

How to Access Assigned Applications

**PCORI Online**

![Application Page Screenshot]

Test new organization name
FC14-1409-22146
Request for $1,837,408.00

**PI AND CONTACT INFORMATION**

**APPLICANT** - Test Principle Investigator

NOTE: PLEASE CONFIRM THAT YOU HAVE ADDED AN ADMINISTRATIVE OFFICIAL (AO) AND PRINCIPAL INVESTIGATOR (PI) AND THAT YOUR AO AND PI ARE NOT THE SAME PERSON. IF THEY ARE, PLEASE RE-EDIT YOUR REQUEST TO ADD THE CORRECT PEOPLE AND EMAIL ADDRESSES ASSOCIATED WITH EACH. CLICK EDIT ON THE APPLICATION AND RE-“ADD” THE INDIVIDUAL.

Principal Investigator: Test Principle Investigator / Email: test@test.com
Administrative Official: Test Principle Investigator / Email: test@test.com
PI Designee / Assistant: Test Principle Investigator / Email: test@test.com
Financial Officer: Test Principle Investigator / Email: test@test.com

**Organization Information**

- Department: Epidemiology
- Street Address 1: 3545 Lafayette
- City: Saint Louis
- State: Missouri
- Country: United States of America
- Zip Code: 63104
- Congressional District: 1

Scroll up for directions on how to find your Congressional District.
How to Print Applications Resubmissions

**PCORI Online**

- The PDF, Print, and Printable buttons will only print the information displayed on the screen.

- To print Templates and Uploads individually, click on the hyperlink of the document you would like to open and print.

- To download a complete PDF of the application, click on the Combined PDF document at the bottom of the list.
• If your assigned application has been identified as a resubmission, you can find the previous reviewer critiques in the “Upload Documents” section.

• The naming convention for this type of document is as follows: “Previous Request Number PI Last Name PFA Previous Reviewer Critiques.pdf”
When you are ready to begin reviewing your applications, click the **Review** button.

You will be taken to the **Application Review page**.

**FC14-1409-22146**
Each Merit Review Criterion is listed on the Review Page.
• Space is provided below each criterion for your qualitative commentary.
• You may cut and paste text from an offline word document if you would like to work offline.

A drop down list is provided to assign a score of 1-9 for each Merit Review Criterion.

The numerical scoring scale is as follows:
1 – **Exceptional**: Exceptionally strong with essentially no weakness
2 – **Outstanding**: Extremely strong with negligible weakness
3 – **Excellent**: Very strong with only some minor weaknesses
4 – **Very Good**: Strong but with numerous minor weaknesses
5 – **Good**: Strong but with at least one moderate weakness
6 – **Satisfactory**: Some strengths but also some moderate weaknesses
7 – **Fair**: Some strengths but with at least one major weakness
8 – **Marginal**: A few strengths and a few major weaknesses
9 – **Poor**: Very few strengths and numerous major weaknesses
How to Save Your Critique

**PCORI Online**

**NOTE:** In order to save your work, text must be entered in every text box (this can be placeholder text).

1. To save your work before it is complete, be sure text is entered in every text box and click on the “Submit Review” button to save your progress.

2. Do not check the “I confirm that my critique is now final” box until your critique is complete.

3. Allow the page to submit and load before leaving the page.
Once you have completed your review and are ready to submit, check the "I confirm that my critique is now final" box and select the Submit Review button.

Important: Once you have checked the box and clicked Submit Review, you will no longer be able to make changes to your application critique.
# Table of Contents

<table>
<thead>
<tr>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
</tr>
<tr>
<td><strong>Using PCORI Online</strong></td>
</tr>
<tr>
<td>How to Login</td>
</tr>
<tr>
<td>How to Review Your Assigned Applications for the Online Review</td>
</tr>
<tr>
<td>How to Review Your Assigned Applications for the In-Person Panel</td>
</tr>
<tr>
<td><strong>Reviewer Resources &amp; Contact Information</strong></td>
</tr>
</tbody>
</table>
You may now access the applications within your panel. Please review the abstracts and reviewer critiques in preparation for panel discussion.

The **Average Online Review Score** is displayed and reflects the average score calculated from the Online Review phase.

### Requests Table

<table>
<thead>
<tr>
<th>Abstract</th>
<th>Request ID</th>
<th>Amount</th>
<th>Date Created</th>
<th>Program Title</th>
<th>Status</th>
<th>Conflict</th>
<th>Average Online Review Score</th>
<th>My Online Review Score</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>R-XXX-###-####</td>
<td>$500,000</td>
<td>9/15/2013</td>
<td>PFA Program Title</td>
<td>Awaiting Review</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>R-XXX-###-####</td>
<td>$600,000</td>
<td>8/16/2013</td>
<td>PFA Program Title</td>
<td>Awaiting Review</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>R-XXX-###-####</td>
<td>$1,000,000</td>
<td>9/14/2013</td>
<td>PFA Program Title</td>
<td>Awaiting Review</td>
<td>20</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Once you click on the Request ID you will be able to view the full application.

You can access the reviewer critiques completed during the Online Review phase by clicking on the “Online Critique” link, located in the “Upload Documents” section.
During the In-Person Panel Review, you will assign an overall score to each application discussed.

To assign this score:
1. Click on the appropriate Request ID from the homepage.
2. Once on the application page, select the “Review” button.
3. Once on the Review page, select a score from the “Overall Review Rating” drop down list.

**NOTE:** Unless selecting a score outside of the scoring range, you do not need to provide Overall Comments.
4. After selecting your score, check the box next to “I confirm that my critique is now final” and click the “Submit Review” button.

3. Enter your score using the drop-down menu.
4. Place any comments in the “Overall Comments” box
5. Check this box before submitting.
6. Click “Submit Review” once you have finished scoring.
# Table of Contents

<table>
<thead>
<tr>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
</tr>
<tr>
<td>Using PCORI Online</td>
</tr>
<tr>
<td>Additional Information</td>
</tr>
</tbody>
</table>
Additional Resources

Reviewer Resources and Contact Information

- To find applications and any additional instructions for a specific opportunity, select the opportunity of interest in the Funding Center and review the applicant resources section of the page.

- PCORI’s Reviewer FAQs cover common questions that any reviewer may have about PCORI and the review process. These are updated on a regular basis to reflect questions received through our helpdesk.

- Reviewer training materials and links to information sessions will be posted on PCORI’s Reviewer Resources page.

- If you have questions, please submit a request here.