

# User Access Cheat Sheet: Logging in & Navigating the Portal



## Logging into PCORI Online

The following steps provide guidance on logging in to PCORI Online.  
Your User Name is the email address you use when interacting with PCORI.

### Logging in as a New User

1.	Navigate to PCORI Online ( <a href="https://pcori.force.com/engagement">https://pcori.force.com/engagement</a> ).
2.	To log-in as a <i>new user</i> , click ' <b>New User?</b> '
3.	Enter information in the required fields (designated with a red asterisks*), and create a password.
4.	Click ' <b>Join PCORI Portal.</b> '
5.	Submit additional information, and click ' <b>Submit.</b> '
6.	You will receive an email with further instructions.
7.	From the automated email, click the link that will direct you to log-in to the PCORI Online home page.

### Logging in as a Returning User

1.	Navigate to PCORI Online ( <a href="https://pcori.force.com/engagement">https://pcori.force.com/engagement</a> ).
1.	To log-in as a <i>returning user</i> , enter your User Name and Password and click ' <b>Log in.</b> '
2.	If you have previously logged into the PCORI portal, your User Name will remain unchanged. ➤ <i>Your username will be the email address used with interacting with PCORI Staff.</i>
3.	If you are prompted to reset your password, click ' <b>Forgot your password?</b> '
4.	On the following screen, enter your User Name (i.e. your email address), and click ' <b>Reset Password.</b> '
5.	You will receive a system-generated email with instructions on how to reset your password
6.	From the automated email, click the link that will direct you to log-in to the PCORI Online home page.

# Navigating the Portal

The following steps provide guidance on navigating to an LOI, Application, or Project.

## Accessing a LOI or Application

1.	Once you have created your account, log in to the PCORI Online Portal ( <a href="https://pcori.force.com/engagement">https://pcori.force.com/engagement</a> ).
2.	On the next page, click the button ' <b>Click here for Research Awards</b> ' to view your Research Award Applications and Projects. ➤ <i>If you have an Engagement Award, click on '<b>Click here for Engagement Awards</b>' instead.</i>
3.	Click on ' <b>My LOIs and Applications</b> ' to access a list of your LOI(s) and Application(s).
5.	If your LOI or Application is not listed, please email the PCORI Help Desk at <a href="mailto:help@pcori.org">help@pcori.org</a> to gain access.

## Accessing a Project

1.	Once you have created your account, log in to the PCORI Online Portal ( <a href="https://pcori.force.com/engagement">https://pcori.force.com/engagement</a> ).
2.	On the next page, click the button ' <b>Click here for Research Awards</b> ' to view your Research Award Applications and Projects. ➤ <i>If you have an Engagement Award, click on '<b>Click here for Engagement Awards</b>' instead.</i>
3.	Click on ' <b>My Projects</b> ' to view a list of your current project(s).
5.	If your project is not listed, please email the PCORI Help Desk at <a href="mailto:help@pcori.org">help@pcori.org</a> to gain access.