

PCORI Advisory Panel Application Manual

For the PCORI Portal

Updated February 4, 2016



PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

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Introduction

What's New?

In February 2016, PCORI debuted the Advisory Panel Application on the PCORI Portal to replace the legacy SurveyGizmo application system. This transition will help Advisory Panel candidates better engage with the PCORI community by streamlining the application process and enabling PCORI Contacts to manage their contact details on their My Profile page. The PCORI Advisory Panel Application Manual is a valuable resource that will serve as a guide to help applicants navigate the system.

Have a question? Please email advisorypanels@pcori.org.



Introduction

User name	Password
<p>For your convenience, your email address will be your User name.</p>	<p>Please establish a password.</p>

Web Browser Requirements

What Browser Should I Use?

The **PCORI Portal** is only compatible with Google Chrome and Safari browsers. We recommend **not** using Internet Explorer.



Click [here](#) to download Chrome for PCs



Click [here](#) to download Safari for Macs

Have a question? Please submit a request [here](#).

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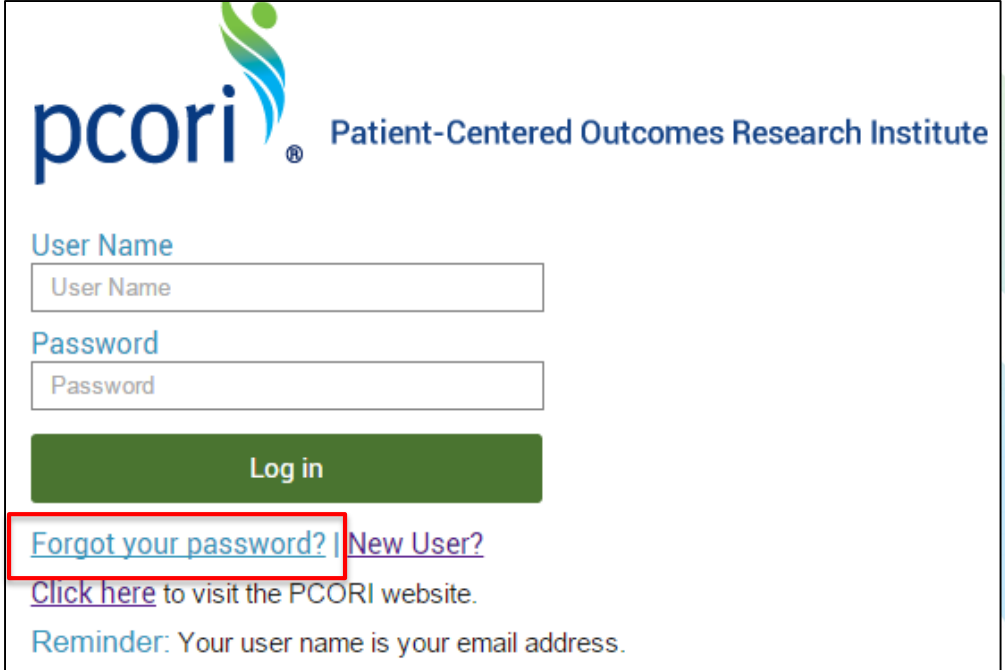
How to Login: Previous Applicants

PCORI Portal

PCORI Portal Login:

<https://pcori.force.com/engagement/>

If you applied to become a PCORI Advisory Panelist prior to February 8, 2016 and have not yet set up a PCORI Portal Account, please click on the “Forgot your password?” link. You will receive an email to set your password. Your username is your email address.



pcori® Patient-Centered Outcomes Research Institute

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.

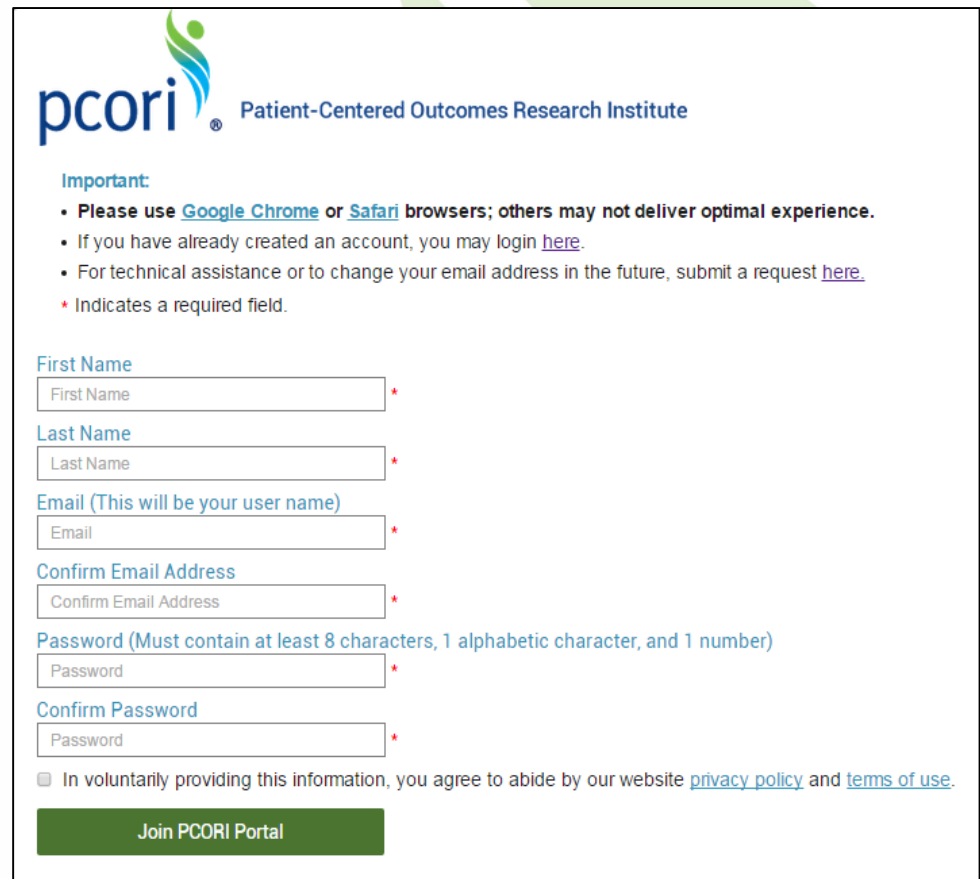


How to Register: New Users

To apply, you must first complete all the fields on the [PCORI Portal](#) self-registration page, then click the **Join PCORI Portal** button.

Please note:

- All **fields** with a red asterisk are required.
- The **email you provide will be your username**. If you need to **change** your email at any time after registering, please submit a request [here](#).

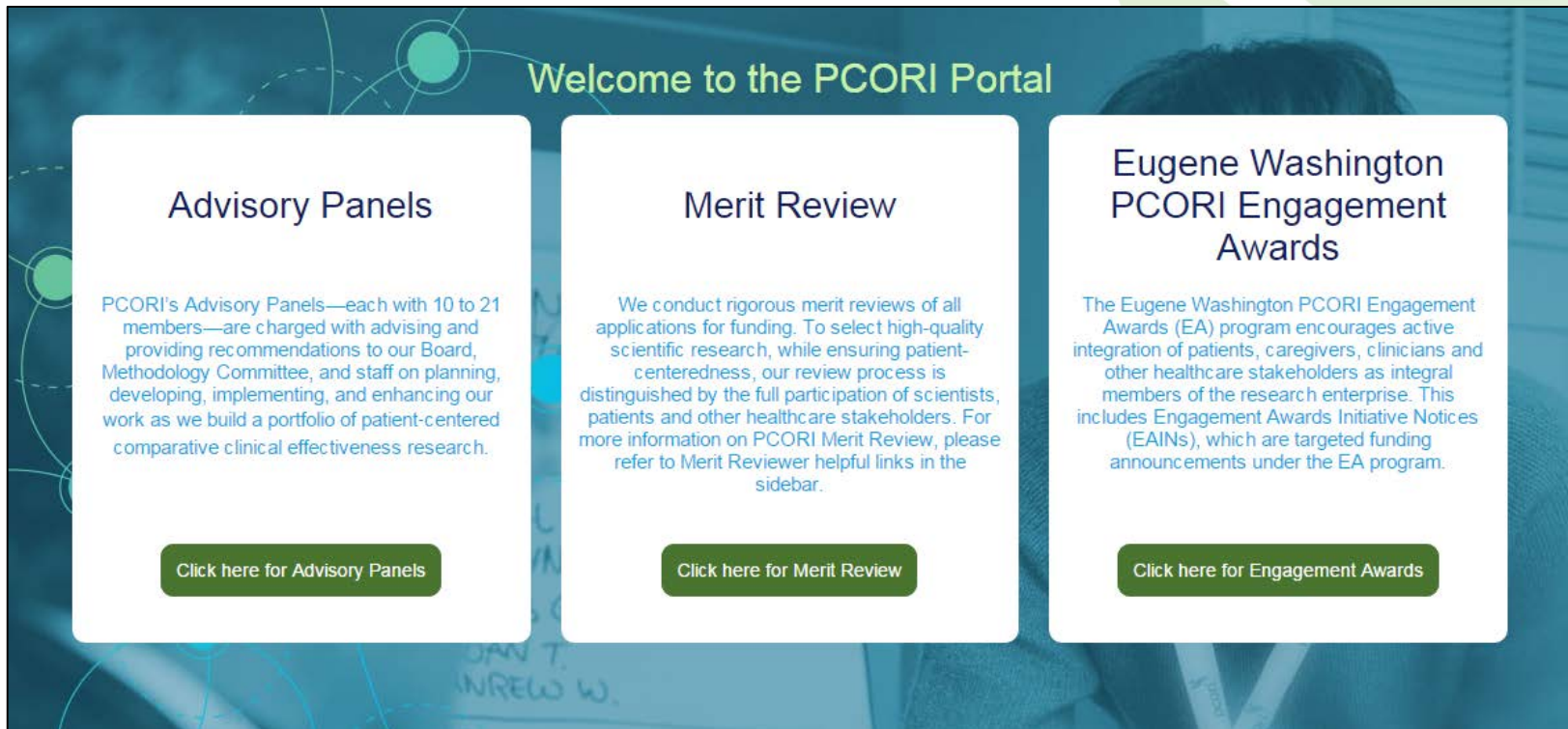


The screenshot shows the PCORI Portal self-registration form. At the top left is the PCORI logo (a stylized human figure in green and blue) and the text "pcori Patient-Centered Outcomes Research Institute". Below the logo is an "Important:" section with three bullet points: "Please use Google Chrome or Safari browsers; others may not deliver optimal experience.", "If you have already created an account, you may login here.", and "For technical assistance or to change your email address in the future, submit a request here." A red asterisk indicates a required field. The form contains several input fields, each with a red asterisk: "First Name", "Last Name", "Email (This will be your user name)", "Confirm Email Address", "Password (Must contain at least 8 characters, 1 alphabetic character, and 1 number)", and "Confirm Password". At the bottom, there is a checkbox for "In voluntarily providing this information, you agree to abide by our website privacy policy and terms of use." and a green button labeled "Join PCORI Portal".



How to Login *PCORI Portal*

Once you have logged into the PCORI Portal, the **Welcome page** will display containing options for Advisory Panels, Merit Review, and Engagement Awards.

A screenshot of the PCORI Portal's 'Welcome to the PCORI Portal' page. The page has a dark blue background with a faint image of a person and some text. At the top, it says 'Welcome to the PCORI Portal' in a light green font. Below this, there are three white rectangular boxes, each with a title, a paragraph of text, and a green button with white text. The first box is for 'Advisory Panels', the second for 'Merit Review', and the third for 'Eugene Washington PCORI Engagement Awards'.

Welcome to the PCORI Portal

Advisory Panels

PCORI's Advisory Panels—each with 10 to 21 members—are charged with advising and providing recommendations to our Board, Methodology Committee, and staff on planning, developing, implementing, and enhancing our work as we build a portfolio of patient-centered comparative clinical effectiveness research.

[Click here for Advisory Panels](#)

Merit Review

We conduct rigorous merit reviews of all applications for funding. To select high-quality scientific research, while ensuring patient-centeredness, our review process is distinguished by the full participation of scientists, patients and other healthcare stakeholders. For more information on PCORI Merit Review, please refer to Merit Reviewer helpful links in the sidebar.

[Click here for Merit Review](#)

Eugene Washington PCORI Engagement Awards

The Eugene Washington PCORI Engagement Awards (EA) program encourages active integration of patients, caregivers, clinicians and other healthcare stakeholders as integral members of the research enterprise. This includes Engagement Awards Initiative Notices (EAINs), which are targeted funding announcements under the EA program.

[Click here for Engagement Awards](#)

How to Update Your Personal Profile

PCORI Portal

1. Click on the **My Profile** tab located at the top of the page to make any updates to your personal contact information or attach a file to your profile.
2. To view your settings information or to log out, click the **drop down arrow** beside your name. **My Settings** includes information general settings and allows you to change your password.

Note: If you need to **change** your email address, you can also click on the **Email Address Change Request** button on the My Profile page. If you need to **change** your employer information, click on the **Edit Employer Details** button on the My Profile page.

1

2

Home	My Profile
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Contact
Dr. Linda Hummel

Attachments [0]

Contact Detail [Edit] [Email Address Change Request] [Edit Employer Details]

Summary Information

Name	Dr. Linda Hummel	Email	lindahummel@nomail.com
Group	Hospital/Health System	Phone	123-456-5432
Federal Employee	No	Mailing Address	123 Main St Charlotte, North Carolina 28201 USA

Highest Level Of Education _____ Race White

Degrees _____ Hispanic/Latino? _____

Degrees Other _____ Gender Female

Current Employer PCORI Portal Account Year of Birth 1962

Current Position or Title Chief Strategy Officer

Department Hospital Administration

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How to Apply *PCORI Portal*

Once you have logged into the PCORI Portal, select **Click here for Advisory Panels**.

Welcome to the PCORI Portal

Advisory Panels

PCORI's Advisory Panels—each with 10 to 21 members—are charged with advising and providing recommendations to our Board, Methodology Committee, and staff on planning, developing, implementing, and enhancing our work as we build a portfolio of patient-centered comparative clinical effectiveness research.

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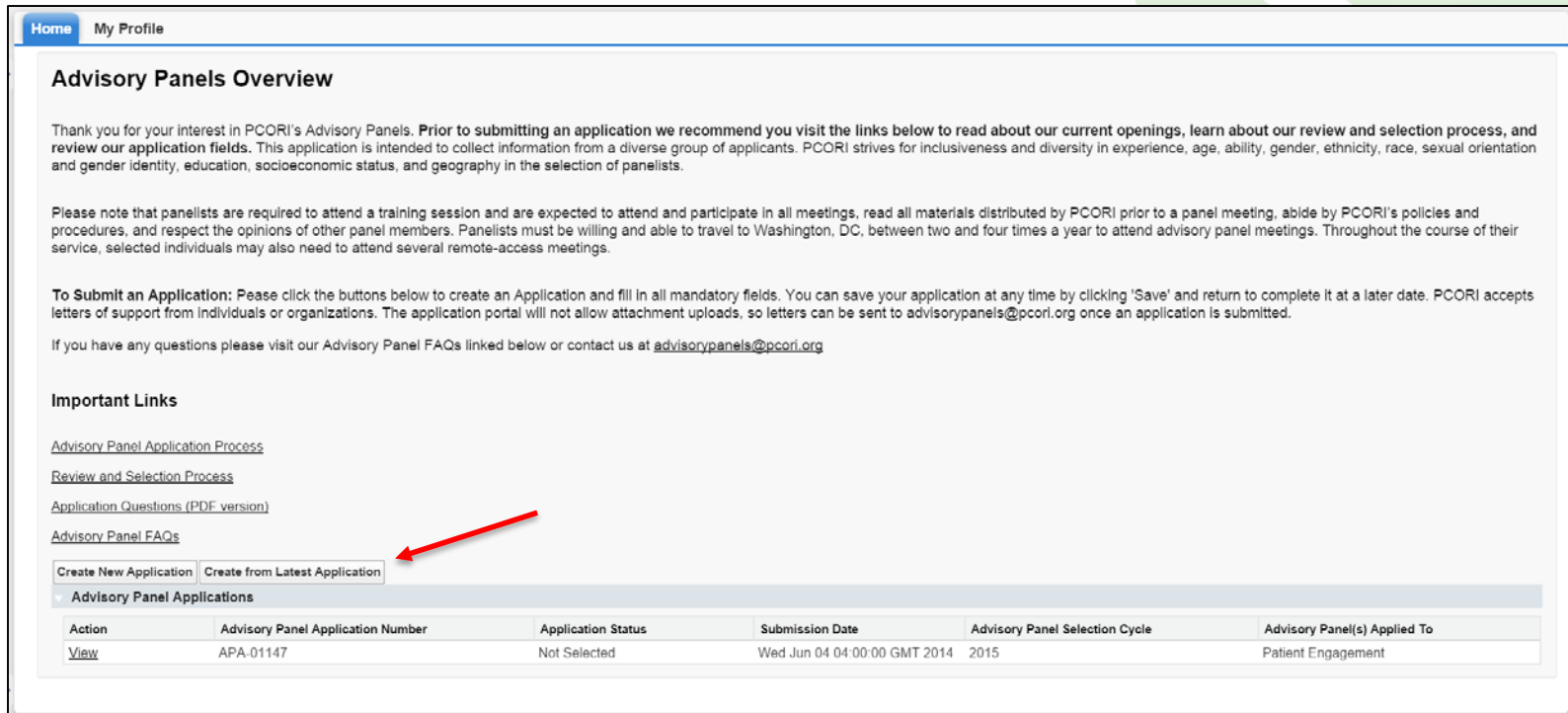
[Click here for Engagement Awards](#)



Creating Your Application: Previous Applicants

PCORI Portal

If you applied previously, you can start the application process by either clicking **Create New Application** or by clicking **Create from Latest Application** to incorporate information submitted in a previous Advisory Panel application.



The screenshot shows the 'My Profile' page with a navigation bar containing 'Home' and 'My Profile'. The main content area is titled 'Advisory Panels Overview' and contains several paragraphs of text. Below the text is an 'Important Links' section with four links: 'Advisory Panel Application Process', 'Review and Selection Process', 'Application Questions (PDF version)', and 'Advisory Panel FAQs'. At the bottom of this section are two buttons: 'Create New Application' and 'Create from Latest Application'. A red arrow points to the 'Create from Latest Application' button. Below the links and buttons is a section titled 'Advisory Panel Applications' which contains a table with one row of application data.

Advisory Panels Overview

Thank you for your interest in PCORI's Advisory Panels. Prior to submitting an application we recommend you visit the links below to read about our current openings, learn about our review and selection process, and review our application fields. This application is intended to collect information from a diverse group of applicants. PCORI strives for inclusiveness and diversity in experience, age, ability, gender, ethnicity, race, sexual orientation and gender identity, education, socioeconomic status, and geography in the selection of panelists.

Please note that panelists are required to attend a training session and are expected to attend and participate in all meetings, read all materials distributed by PCORI prior to a panel meeting, abide by PCORI's policies and procedures, and respect the opinions of other panel members. Panelists must be willing and able to travel to Washington, DC, between two and four times a year to attend advisory panel meetings. Throughout the course of their service, selected individuals may also need to attend several remote-access meetings.

To Submit an Application: Please click the buttons below to create an Application and fill in all mandatory fields. You can save your application at any time by clicking 'Save' and return to complete it at a later date. PCORI accepts letters of support from individuals or organizations. The application portal will not allow attachment uploads, so letters can be sent to advisorypanels@pcori.org once an application is submitted.

If you have any questions please visit our Advisory Panel FAQs linked below or contact us at advisorypanels@pcori.org

Important Links

- [Advisory Panel Application Process](#)
- [Review and Selection Process](#)
- [Application Questions \(PDF version\)](#)
- [Advisory Panel FAQs](#)

Advisory Panel Applications

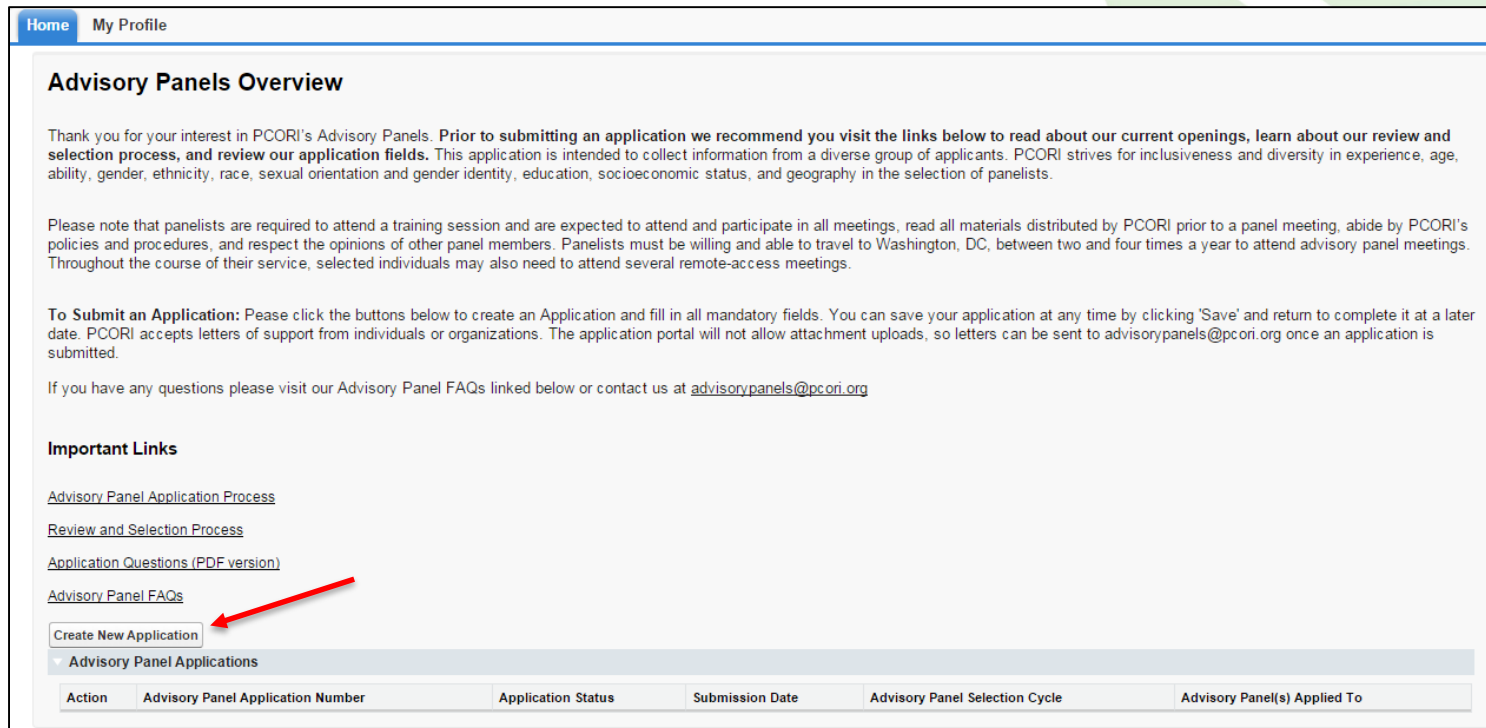
Action	Advisory Panel Application Number	Application Status	Submission Date	Advisory Panel Selection Cycle	Advisory Panel(s) Applied To
View	APA-01147	Not Selected	Wed Jun 04 04:00:00 GMT 2014	2015	Patient Engagement



Creating Your Application: New Users

PCORI Portal

If this is your first time to apply, start the application process by clicking **Create New Application**.



The screenshot shows the 'Advisory Panels Overview' page on the PCORI portal. At the top, there are navigation tabs for 'Home' and 'My Profile'. The main heading is 'Advisory Panels Overview'. Below this, there is a paragraph of introductory text, followed by a paragraph of instructions for panelists, and another paragraph about submitting an application. A red arrow points to a button labeled 'Create New Application' in the 'Important Links' section. Below the links is a table titled 'Advisory Panel Applications' with columns for Action, Advisory Panel Application Number, Application Status, Submission Date, Advisory Panel Selection Cycle, and Advisory Panel(s) Applied To.

[Home](#) [My Profile](#)

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Important Links

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- [Review and Selection Process](#)
- [Application Questions \(PDF version\)](#)
- [Advisory Panel FAQs](#)
- Create New Application**

Advisory Panel Applications

Action	Advisory Panel Application Number	Application Status	Submission Date	Advisory Panel Selection Cycle	Advisory Panel(s) Applied To
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How to Apply PCORI Portal

On the first page of the application, fill out all COI information and attach a signed copy of the COI form. Please note that to be considered for membership on any PCORI Advisory Panel, applicants must agree to abide by PCORI's Conflict of Interest Policy and publicly disclose any potential conflicts.

pcori | Patient-Centered Outcomes Research Institute

Home My Profile

Page 1/4 COI & Payments Save as Draft

Application Status

Do you agree to abide by PCORI's Conflict of Interest Policy and to publicly disclose any potential conflicts? If so, please download and save the linked COI form to your computer, complete it and upload below.

* Yes

Upload Attachment Save

Please download the PCORI Conflict of Interest form. Complete the form and rename the file with your full name. Then "Browse" and select the form. Then click "Save" before you proceed with the remainder of this application form.

[PCORI Conflict of Interest Form](#)

File Name

File Choose File No file chosen Description

Save

How to Indicate COI

PCORI Portal

When saving your COI, it is important to remember to rename the file with your full name.

Upload Attachment

Please download the PCORI Conflict of Interest form. Complete the form and rename the file with your full name. Then "Browse" and select the form. Then click "Save" before you proceed with the remainder of this application form.

[PCORI Conflict of Interest Form](#)

File No file chosen

File Name

Description



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Additional Resources

Advisory Panel Resources and Contact Information

- [The Advisory Panel Application Process](#) page covers requirements, expectations, and instructions on how to apply.
- PCORI's [Advisory Panel 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.
- If you have questions, please submit email advisorypanels@pcori.org.