PCORI Online Cheat Sheet:
Application Submission

Document updated to reflect the 11/20/2020 system change.

Important Reminders

⚠ **IMPORTANT:** These instructions supersede and replace previous instructions due to recent updates to the Application form.

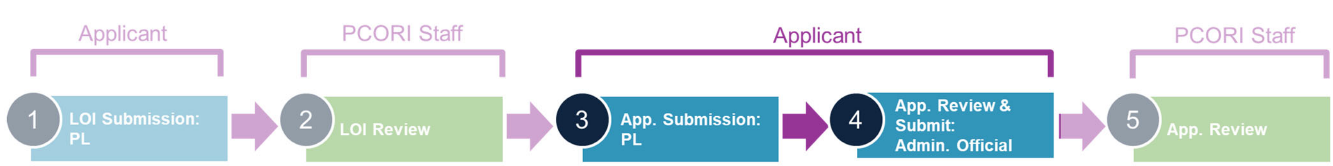
This Cheat Sheet provides guidance on how to:

- Navigate to the approved Application
- Complete and Submit the approved Application

Please keep in mind the following user roles:

User Role	Definition
Project Lead (PL)	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.
PL Designee	An individual selected by the 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.

If the Letter of Inquiry (LOI) has been reviewed and the organization is invited to continue in the Application process, the next step will be to complete the full Application. The Application will automatically be created based on the initial LOI. The Applicant will update any previously populated information as necessary, add additional information, and submit to the AO for approval. Once the AO approves and submits the Application, the status will be updated to 'Under Review' by PCORI Staff as they begin their review. PCORI Staff will review for administrative compliance and responsiveness to the funding announcement prior to making a final decision.



🕮 **NOTE**: Some questions vary between PFA type but the general instructions apply to each type.

Navigate to Application

Navigate to the Application in PCORI Online:	
1.	Log-in to PCORI Online.
2.	From the PCORI Online home page, click the '**Engagement Awards**' button.
3.	Scroll down and click on the '**Engagement Awards Dashboard**' button. Ensure the **Applications** tab is selected.
4.	In the **Edit** column, click on the paper and pen icon ( )to open the application.

Application Submission

Once you have navigated to the Application, you can enter the requested information. Throughout the form, required fields are designated with a red asterisk (*).

At the top and bottom of each tab, there are buttons that will help with navigation:

Icon	Definition	
Save	Use '**Save**' to automatically save all information entered into the application.	Save
Save & Next	Use '**Save & Next**' to automatically save the information entered into the application, as well as navigate to the next tab.	Save & Next
Cancel	Use '**Cancel**' to clear any unsaved changes made on the current tab.	Cancel
Review/ Submit	Use '**Review/Submit**' when you have completed all tabs of the application and are ready to submit to PCORI.	Review/Submit
Clear Changes	Use '**Clear Changes**' when you want to remove any unsaved responses or text.	Clear Changes

The following steps will walk through the Application form, which contains the following tabs, in this order:

Application Tabs		
General Information	Select the applying organization and identify the Project Lead.	General Information
Additional Key Roles	Select individuals for the AO role and PL designee roles (if applicable).	Additional Key Roles
Pre-Screen Questionnaire	Verify your project is responsive to programmatic requirements.	Pre-Screen Questionnaire

Organization & Project Lead Details	Provide financial and capacity information about the organization, and the Project Lead's PCOR/CER experience and history with PCORI and other funders.	Organization & Project Lead Details
Project Summary	Add Project Name, Background, Proposed Solution, Objectives, Methods, Outcomes, Patient & Stakeholder Engagement, and Evaluation and Sustainability Plans.	Project Summary
Additional Project Information	Provide budget summary, requested contract dates, and information about the populations and stakeholders to be engaged.	Additional Project Information
Using PCORI-funded Evidence & Tools	Inform whether PCORI-funded evidence will be disseminated, or PCORI-funded engagement tools or resources will be used or adopted.	Using PCORI-funded Evidence & Tools
Key Personnel	Add the names of Project Personnel who will make up the Awardee Project team.	Key Personnel
Attachments	Upload related documents to Application resources; templates are provided.	Attachments
Budget	Provide details related to the budget of the project.	Budget
Authorizations	Select 'Yes' to certify that you are authorized to submit this application.	Authorizations

Complete and Submit the Application

General Information Tab

⚠ **IMPORTANT: The data from the LOI is copied into the Application, however, please review all fields to ensure the information is accurate and up to date.**

1.	Ensure that all the data copied from the LOI is up-to-date and accurate. If you need to look up any personnel, use the lookup icon (magnifying glass) to search for and populate any missing fields. 🕮 **NOTE**: Only Project Personnel with active PCORI Online accounts will appear in the Lookup search results. **This applies to each tab on the Application.**
2.	Click '**Save**" to stop here OR click '**Save & Next**' to continue to the **Additional Key Roles** tab.

Additional Key Roles Tab

🕮 **NOTE: AO** is required for Application submission but not to generate an Application number.

1.	Ensure that all the data copied from the LOI is up-to-date and accurate. If you need to look up any personnel, use the lookup icon (magnifying glass) to search for and populate any missing fields
2.	Click '**Save**' to stop here OR click '**Save & Next**' to continue to the **Pre-Screen Questionnaire** tab.

Pre-Screen Questionnaire Tab	
1.	Read the bulleted information at the top of the page. Use the drop-down menu to select '**Yes**' or '**No**' to indicate if your project contains any of the activities listed on the page. ⚠ ***IMPORTANT**: If you answer '**Yes**,' your* Application *will be screened as non-responsive and will not be reviewed .*
2.	Click '**Save**' to stop here <u>OR</u> click '**Save & Next**' to continue to the **Organization & Project Lead Details** tab.
Organization & Project Lead Details Tab ⚠ **IMPORTANT**: All **narrative** text entry fields on this tab are limited to 1,000 characters INCLUDING spaces.	
1.	Provide **Organization** and **Project Lead Information** (i.e. Financial Status, EIN Number, Organizational History, Capacity and Mission, etc.). 📖 **NOTE**: At the end of this tab, there are 2 new questions: *1.* "Which best describes your organization's fiscal year calendar" *2.* "Other fiscal calendar." The FIRST question is required. If "Other" is selected, please be sure to fill in the open text entry field below it.
2.	Click '**Save**' to stop here <u>OR</u> click '**Save & Next**' to continue to the **Project Summary** tab.
Project Summary Tab ⚠ **IMPORTANT**: All **narrative** text entry fields on this tab are limited to 1,000 characters INCLUDING spaces.	
1.	Fill out information regarding your Project Summary (i.e. Project Name, Background, Objectives, Methods and Outcomes, etc.). 📖 **NOTE**: At the end of this tab, there is a new question, "Project Summary." Provide PCORI with a summary of your project for the general public. This summary may be posted to PCORI.org or in other PCORI materials, if awarded. Follow instructional text for what to include in the summary.
2.	Click '**Save**' to stop here <u>OR</u> click '**Save & Next**' to continue to the **Additional Project Information** tab.
Additional Project Information Tab ⚠ **IMPORTANT**: All **narrative** text entry fields on this tab are limited to 1,000 characters INCLUDING spaces.	
1.	Provide Amount Requested from PCORI, Total Project Budget, and a narrative describing how the amounts requested will be used.
2.	Select whether patient/stakeholder partners will receive compensation for their role in the project. If **Yes**, describe compensation stakeholders will receive. Please be sure to describe the compensation that your patient/stakeholder partners will receive.
3.	Provide the requested project start and end dates.
4.	Answer questions related to the project's topic and population focus.
5.	Provide experiential evidence of established relationships with the population with whom you intend to engage.
6.	Describe the unique capabilities of the Project Lead.

7.	Indicate the names of collaborator/partner organizations.
7.	Select the option that indicates whether this is a **previously existing project funded by others**. If **Yes**, describe funders and explain. Be sure to answer the question about collaborations with existing PCORnet entities.
8.	Click '**Save**' to stop here OR click '**Save & Next**' to continue to the **Using PCORI-funded Evidence & Tools** tab
Using PCORI-funded Evidence & Tools Tab 🕮 **NOTE:** Pay careful attention to the information requirements on this tab as each PFA type contains unique questions.	
1.	Answer PFA-specific questions as listed in this Tab. Closely review instructional text to ensure you are responding fully to the question prompt(s).
2.	Click '**Save**' to stop here OR click '**Save & Next**' to continue to the **Key Personnel** tab.
Key Personnel Tab ⚠ **IMPORTANT**: All fields are required for each individual added. You may add up to 5 individuals.	
1.	Click '**+New**' to add a new Key Personnel record. 🕮 **Note**: Examples of Key Personnel include, but are not limited to, any Designees, Finance Officers, and other stakeholders associated with project.
2.	Enter all requested information for the personnel, including name, institution, experience, degrees, email, and role.
3.	Click '**Save**' to save the new personnel record, and you will return to the **Key Personnel** tab.
4.	To '**Delete**,' '**Edit**,' or '**View**' existing Key Personnel records, navigate to the **Action** column and click the applicable button.
5.	To add additional personnel records, click '**+New**' and repeat steps 2-3.
6.	When you have finished adding Key Personnel, click '**Next**' to navigate to the **Attachments** tab.
Attachments Tab	
1.	Follow link to access and download any applicable templates to include with the Application.
2.	To upload the completed templates, click '**Choose file**' to select a file from your computer, and click '**Upload**.' 🕮 **Note**: All uploaded documents must be in PDF, Word, or Excel format. Please reference the instructional text and Engagement Award Submission Instructions for more information.
3.	Click '**Next**' to go to the **Budgets** tab.
Budgets Tab	
1.	Click '**+New**' to add a new Budget record.
2.	Enter the subtotal dollar amount for all the line items for both Year 1 and Year 2 of your requested budget: Personnel, Consultant, Supply, Travel, Other, Subcontractor, and Indirect Costs.
3.	Click '**Save**' to save the new Budget record, and you will return to the **Budget** tab.

4.	To '**Delete**' or '**View**' the existing Budget, navigate to the **Action** column and click the applicable button.
Authorizations Tab	
1.	Review the statements on the page. Select '**Yes**' or '**No**' to indicate the information in the Application is correct and that you are authorized to submit the Application. 🕮 **NOTE**: If you answer '**Yes**,' you will be given your Application number. Retain this number for future reference.
2.	Click '**Save**' then scroll to the top of the page.
Review & Submit	
1.	When you have completed the Application and are ready to submit, click '**Review/Submit**' at the top right of your screen.
2.	Review details and click '**Submit**.'
3.	In the pop-up message, click '**OK**' to verify your submission.
The submitted Application *will still be accessible through the Engagement Awards Dashboard and will be read-only.*	