PCORI Online Cheat Sheet:
Administrative Official: Logging in & Application Submission
*Updated as of 11/2/2018*

Important Reminders

This Cheat Sheet provides guidance on:
- Logging in to PCORI Online:
  - ○ Create a New User Account
  - ○ Logging in as a Returning User
- Application Submission
  - ○ Approving an Application

Please keep in mind the following icons, user roles, and definitions:

User Role	Definition
Project Lead (PL)	Institution's primary Point of Contact (POC) throughout the lifecycle of the contract award; responsible for the **programmatic conduct** of the Engagement Awards 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 overseeing the submission of the contract activation, contract renewals, and other required materials.

The image below illustrates the Application submission and review process. Please keep this process in mind while reviewing the steps below.
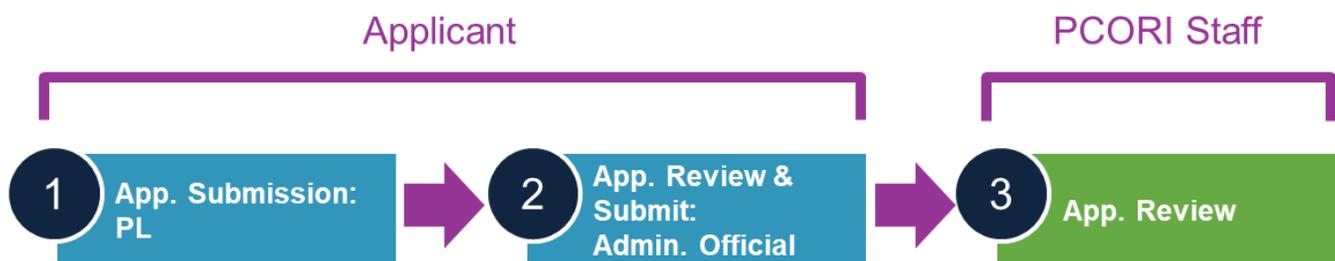
1	Logging in to PCORI Online

The following steps provide guidance on logging into PCORI Online. Your User Name is the email address you use when interacting with PCORI. If you do not have an account in PCORI Online, follow the steps below to 'Create a New User Account.' If you are a returning user, skip to **Logging in as a Returning User**.

	Create a New User Account
1.	To log-in to PCORI Online as a *new user*, click '**New User?**'
2.	Enter information in the required fields (designated with a red asterisk*), and create a password.
3.	Click '**Join PCORI Portal**.'
4.	Submit additional information, and click '**Submit**.'
5.	You will receive an email with further instructions.
6.	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.	To log-in to PCORI Online as a *returning user*, enter your User Name and Password and click '**Log in**.'
2.	If you have previously logged into PCORI Online, your User Name will remain unchanged. ➢ *Your username will be the email address used when interacting with PCORI Staff.*
3.	If you are prompted to reset your password, click '**Forgot your password?**'
4.	On the following screen, enter your User Name (i.e. your email address), and click '**Reset Password**.'
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.
7.	From the PCORI Online home page, click the '**Engagement Awards**' button.
8.	Click '**Engagement Awards Dashboard**' to access the LOI/Application Dashboard.

2	Application Submission & Approval

The following steps detail the AO approval process after the Application has been submitted.

Approve the Application and Submit to PCORI	
Once the Application is submitted for approval, the Administrative Official (AO) can log-in to [PCORI Online](#) to review and approve the Application.	
1.	Navigate to the **Open Items** on the LOI/Application Dashboard, and locate the Application with an External Status of '**Submitted – Pending AO Approval**.'
2.	Review the read-only version of the submitted Application by clicking the magnifying glass icon.
3.	Click the icon under the **AO Approve/Withdraw** column to Approve, Reject, or Withdraw the submitted Application.
4.	A pop-up message will appear, confirming that you would like to proceed with AO Approval, rejection, or withdrawal. Click '**OK**.'
5.	On the **AO Approval/Withdraw** page, read the statements at the top of the page, then use the first drop-down menu to select '**Yes**' that you agree or '**No**' that you do not agree with the statements you just read.
6.	Then, use the second drop down and to '**Approve**' or **'Reject'** the Application. ➢ *Note: If the AO **rejects** the Application, the status will be updated to '**Draft**' and the Application will be editable for updates.* ➢ *Note: If you would like to withdraw the Application, use the third drop-down menu to select 'Withdraw' and enter Withdrawal Reason(s). Please note that you can withdraw the Application at any time.*
7.	When you have completed your review of the Application and entered a decision, click '**Save**.' ➢ *If you select '**No**' for the agreement drop-down menu but select '**Approve**' for the AO Approval drop-down menu, you will not be able to submit the Application.*
8.	When you are ready to submit the Application to PCORI, click '**Review/Submit**.'
9.	You will be taken to a read-only view of the AO Decision. When you are ready to submit the Application to PCORI, click '**Submit**.' ➢ *Note: You can confirm the Application's submission on the LOI/Application Dashboard, where the External Status will be '**Submitted – AO Approved**.'*
*The Application is now under formal review by PCORI Staff, and no further action is required by the Applicant. Once PCORI Staff initiates the review process for the Application, the Application will move to the **Closed Items** tab on the LOI/Application Dashboard, where the External Status will be '**Under Review**.' The Applicant will be notified at a later date by PCORI Staff whether the Application has been awarded.*	

Applicant   PCORI Staff

1 App. Submission: PL → 2 App. Review & Submit: Admin. Official → 3 App. Review