

# PCORI Online Cheat Sheet: Engagement Award LOI and Application Submission

Updated as of 11/2/2018

## Important Reminders

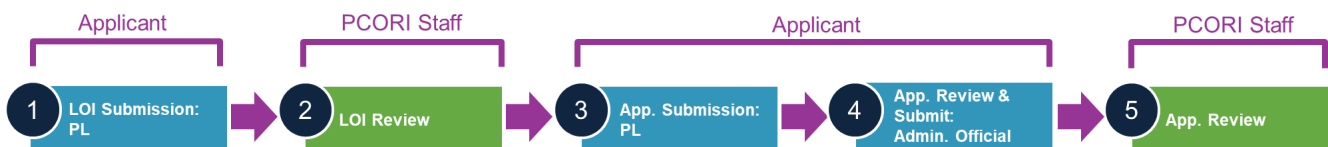
This Cheat Sheet provides guidance on how to:

- Navigate to and Select Funding Opportunity
- Navigate to Draft Letter of Inquiry (LOI)
- Complete and Submit LOI
- Navigate to Application
- Update and Submit the Application for AO Approval
- Approve the Application and Submit to PCORI (AO)

Please keep in mind the following user roles:

User Role	Definition
<b>Project Lead (PL)</b>	Institution's <b>primary Point of Contact (POC)</b> throughout the lifecycle of the project, from LOI submission to project completion; is responsible for the programmatic conduct of the project.
<b>PL Designee</b>	An individual selected by the Project Lead (PL) to act as a <b>backup or alternate</b> .
<b>Administrative Official (AO)</b>	Responsible for the <b>proper administration</b> of the contract, including approving the Application submission, overseeing contract modifications, and other required materials.

**LOI and Application Process:** The image below illustrates the LOI and Application submission and review process. Applying for Engagement Award funding from PCORI is a two-stage process. A Letter of Inquiry (LOI) must be submitted before an organization is invited to submit a full Application. Specific requirements and guidance to complete a successful LOI and subsequent Application are found in the funding announcement, Application guidelines, and Application checklist for each specific funding opportunity.



## Navigate to and Select Funding Opportunity

*A Letter of Inquiry (LOI) must be submitted before an organization is invited to submit a full Application.*

### Search for Funding Opportunities through PCORI Online:

1.	Log-in to <a href="#">PCORI Online</a> .
2.	From the PCORI Online home page, click the ' <b>Engagement Awards</b> ' button.
3.	Click ' <b>Create LOI</b> .'
4.	Review the Engagement Award description and instructions, then click ' <b>Apply</b> .'

### Search for Funding Opportunities through PCORI.org:

1.	Navigate to <a href="http://www.pcori.org">www.pcori.org</a> .
2.	Click ' <b>Funding Opportunities</b> .'
3.	Under <b>Open</b> opportunities, scroll down and click on the title the opportunity to which you will apply.
4.	Click ' <b>Apply Now</b> .'
5.	On the next page, you will be prompted to log-in to PCORI Online. Enter your User Name and Password, and click ' <b>Log in</b> .'
6.	Once logged in to PCORI Online, confirm the opportunity to which you will apply, and click ' <b>Apply</b> .'






## Navigate to Draft Letter of Inquiry (LOI)

*If you have started a LOI for a PCORI funding opportunity, you can navigate to the draft through PCORI Online.*

1.	Log-in to <a href="#">PCORI Online</a> .
2.	From the PCORI Online home page, click the ' <b>Engagement Awards</b> ' button.
3.	Click ' <b>Engagement Awards Dashboard</b> ' to navigate to the LOI/Application Dashboard.
4.	On the left-side menu, click ' <b>LOIs</b> .'
5.	Under <b>Open Items</b> , locate the draft LOI you would like to continue editing, and click the ' <b>Edit</b> ' icon.

## Letter of Inquiry (LOI) Submission

Once you have navigated to the LOI form, you can enter the requested information. 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	
<b>Save</b>	Use ' <b>Save</b> ' to automatically save all information entered into the LOI.	
<b>Save &amp; Next</b>	Use ' <b>Save &amp; Next</b> ' to automatically save the information entered into the LOI, as well as navigate to the next tab.	
<b>Cancel</b>	Use ' <b>Cancel</b> ' to clear any unsaved changes made on the current tab.	
<b>Review/Submit</b>	Use ' <b>Review/Submit</b> ' when you have completed all tabs of the LOI, and are ready to submit to PCORI.	
<b>Clear Changes</b>	Use ' <b>Clear Changes</b> ' when you want to remove any unsaved responses or text.	

Please also keep in mind the following user roles and definitions:

### Applicant Project Team

User Role	Definition
<b>Administrative Official (AO)</b>	Responsible for the proper <b>administration of the contract</b> , including overseeing the submission of the LOI and/or Application, contract renewals, and other required materials.
<b>Project Lead (PL)</b>	Institution's primary Point of Contact (POC) throughout the lifecycle of the contract award; responsible for the <b>programmatic conduct</b> of the Application and project.
<b>PL Designee</b>	An individual selected by the <b>Project Lead (PL)</b> to act as a <b>backup or alternate</b> .

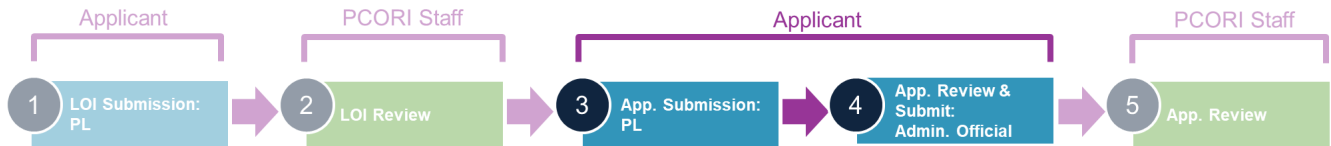
### PCORI Staff

User Role	Definition
<b>Contracts Administrator (CA)</b>	PCORI's primary <b>contracts</b> point of contact (POC) for the project(s).
<b>Engagement Awards Program Manager (PM)</b>	PCORI's primary <b>Program Manager</b> for Engagement Awards project(s).
<b>Program Officer (PO)</b>	PCORI Staff member responsible for <b>supporting the Program Manager</b> on projects.

The following steps will walk through the LOI form, which contains the following tabs:

LOI Tabs		
<b>Contact Information</b>	Add basic contact information for the Organization/ Institution, including the PL, AO, and any Designees.	<b>Contact Information</b>
<b>Pre-Screen Questionnaire</b>	Respond to initial screening questions.	<b>Pre Screen Questionnaire</b>
<b>Details</b>	Provide details on the Organization, Project Lead and Project.	<b>Details</b>

Complete and Submit LOI	
<b>Contact Information Tab</b>	
1.	Click the magnifying glass icon to open the Lookup window. Search for and select the <b>Project Lead (PL)</b> , <b>PL Designees</b> (if applicable), <b>Administrative Official (AO)</b> and <b>Organization</b> . <ul style="list-style-type: none"> <li>➤ <i>Only Project Personnel with active PCORI Online accounts will appear in the Lookup search results.</i></li> </ul>
2.	Click <b>'Save &amp; Next'</b> to continue to the next tab, <b>Pre-Screen Questionnaire</b> .
<b>Pre-Screen Questionnaire Tab</b>	
1.	Read the bulleted information at the top of the page. Use the drop-down menu to select <b>'Yes'</b> or <b>'No'</b> to indicate if your project contains any of the activities listed on the page. <ul style="list-style-type: none"> <li>➤ <i>If you answer 'Yes,' your LOI will not progress past the review stage.</i></li> </ul>
2.	Click <b>'Save &amp; Next'</b> to continue to the next tab, <b>Details</b> .
<b>Details Tab</b>	
1.	Provide <b>Organization</b> and <b>Project Lead Information</b> (i.e. Financial Status, EIN Number, Organizational History, Capacity and Mission, etc.).
2.	Fill out information regarding your <b>Project Summary</b> (i.e. Project Name, Background, Objectives, Methods and Outcomes, etc.).
3.	Use drop-down menus to complete the <b>Project Information</b> section. i.e. (Engagement Award Type, Previously Funded, Collaborations with PCORnet Entities).
4.	Complete the <b>Authorizations</b> section and select 'Yes' to certify that you are authorized to submit this LOI.
5.	Click <b>'Save.'</b>
<b>Review &amp; Submit</b>	
1.	When you have completed the LOI and are ready to submit, click <b>'Review/Submit'</b> at the top right of your screen.
2.	Review details and click <b>'Submit.'</b>
3.	In the pop-up message, click <b>'OK'</b> to verify your submission.
<i>The submitted LOI will still be accessible through the LOI/Application Dashboard and will be read-only.</i>	








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 be automatically 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.

### Navigate to the Application

*If your LOI has been approved and you are invited to submit a full Application, PCORI has created a draft Application in PCORI Online, pre-populated with some of the information from your LOI submission.*

1.	Log-in to <a href="#">PCORI Online</a> .
2.	From the PCORI Online home page, click the ' <b>Engagement Awards</b> ' button.
3.	Click ' <b>Engagement Awards Dashboard</b> ' to navigate to your draft Application.
4.	On the left-side menu, click ' <b>Applications</b> .'
5.	Search for the draft Application you would like to edit, and click the ' <b>Edit</b> ' icon.

Once you have navigated to the Application, you can enter the requested information. 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	
<b>Save</b>	Use ' <b>Save</b> ' to automatically save all information entered into the LOI.	
<b>Save &amp; Next</b>	Use ' <b>Save &amp; Next</b> ' to automatically save the information entered into the LOI, as well as navigate to the next tab.	
<b>Cancel</b>	Use ' <b>Cancel</b> ' to clear any unsaved changes made on the current tab.	
<b>Review/Submit</b>	Use ' <b>Review/Submit</b> ' when you have completed all tabs of the LOI, and are ready to submit to PCORI.	
<b>Clear Changes</b>	Use ' <b>Clear Changes</b> ' when you want to remove any unsaved responses or text.	

Please also keep in mind the following user roles and definitions:

### Applicant Project Team

User Role	Definition
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### PCORI Staff

User Role	Definition
<b>Contracts Administrator (CMA)</b>	PCORI's primary <b>contracts</b> point of contact (POC) for the project(s).
<b>Engagement Awards Program Manager (PM)</b>	PCORI's primary <b>Program Manager</b> for Engagement Awards project(s).
<b>Program Officer (PO)</b>	PCORI Staff member responsible for <b>supporting the Program Manager</b> on projects.

The following steps will walk through the full Application, which contains the following tabs. Most of the information from the **Details** tab has been pre-populated from the LOI submission.

### Application Tabs

<b>Details</b>	Provide Organization and Project Lead Information.	<b>Details</b>
<b>Key Personnel</b>	Add the names of Project Personnel who will make up the Awardee Project team.	<b>Key Personnel</b>
<b>Attachments</b>	Upload related documents to Application resources, templates are provided.	<b>Attachments</b>
<b>Budget</b>	Provide details related to the budget of the project.	<b>Budget</b>

## Update and Submit the Application for AO Approval

### Details (Pre-Populated from LOI Submission)

*If changes need to be made regarding the Organization Name, Administrative Official, or Project Lead, email [ea@pcori.org](mailto:ea@pcori.org)*

1. On the **Details** tab, review the pre-populated information from your LOI Submission.
2. Complete the **Authorizations** section by selecting 'Yes' to certify that you are authorized to submit this Application.
3. Click '**Save & Next**' to advance to the **Key Personnel** tab.

### Key Personnel

*You may enter up to five key personnel records. Do not include details regarding your Project Lead.*

1. On the **Key Personnel** tab, click '**+New**' to add a new 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. 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 then click '**Upload**.'
  - *Note: All uploaded documents must be in PDF, Word, or Excel format. Please reference the PFA guidelines for more information.*
3. Click '**Save & Next**' to navigate to the **Budget** tab.

### Budget Tab

1. On the Budget tab, 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.

### Review & Submit

1. When you have completed the Application, and are ready to submit, click '**Review/Submit**.'
2. You will be taken to the read-only view of the Application.

3. When you have fully reviewed the Application, and are ready to submit to the AO for approval, click **'Submit.'**

## Approve the Application and Submit to PCORI

*Once the Application is submitted for internal 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 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.*

