

PCORI Online Cheat Sheet: Engagement Award Initiative Notice Application Submission

Updated as of 11/2/2018

Important Reminders

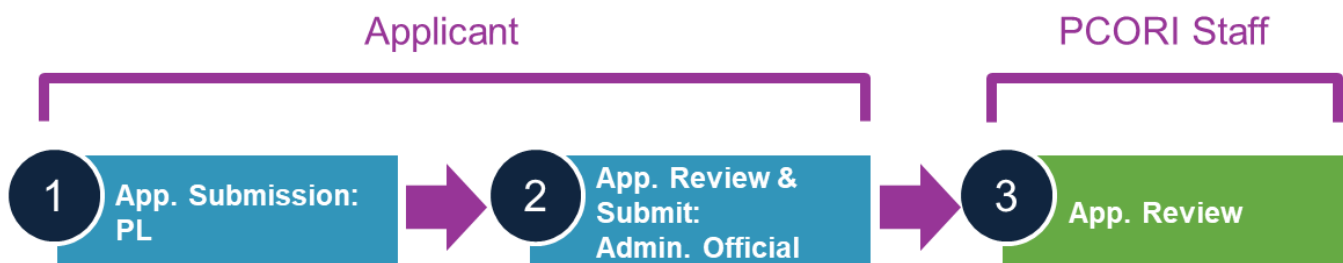
This Cheat Sheet provides guidance on how to:

- Navigate to and Select Funding Opportunity
- Navigate to an 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
Project Lead (PL)	Institution's primary Point of Contact (POC) throughout the lifecycle of the project, from Application 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.

Application Process: The image below illustrates the Application submission and review process. Applying for Engagement Awards Initiative Notice (EAIN) requires submitting an Application. Applying for an EAIN funding announcement is a one-step process. EAIN Applicants will submit a full Application and will not complete the steps for an LOI submission. Specific requirements and guidance to complete a successful Application are found in the funding announcement, Application guidelines, and Application checklist for each specific funding opportunity.



Navigate to and Select Funding Opportunity

Search for Funding Opportunities through PCORI Online:

1.	Log-in to PCORI Online .
2.	From the PCORI Online home page, click the ' Engagement Awards ' button.
3.	Click ' Create Meeting and Conference Support Proposal. '
4.	Click ' Apply. '

Search for Funding Opportunities through PCORI.org:






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

Navigate to a Draft Application

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

1.	Log-in to PCORI Online .
2.	From the PCORI Online home page, click the ' Engagement Awards ' button.
3.	Click ' Engagement Awards Dashboard ' to navigate to the LOI/Application Dashboard.
4.	On the left-side menu, click ' Applications. '
5.	Under Open Items , locate the draft Application you would like to continue editing, and click the Edit 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	
Save	Use ' Save ' to automatically save all information entered into the LOI.	
Save & Next	Use ' Save & Next ' to automatically save the information entered into the LOI, as well as navigate to the next tab.	
Cancel	Use ' Cancel ' to clear any unsaved changes made on the current tab.	
Review/ Submit	Use ' Review/Submit ' when you have completed all tabs of the LOI, and are ready to submit to PCORI.	
Clear Changes	Use ' Clear Changes ' when you want to clear out all text entered in LOI prior to saving.	

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





Applicant Project Team

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

PCORI Staff

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

The following steps will walk through the full Application, which contains the following tabs.

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

Update and Submit the Application for AO Approval

Once you have navigated to the Application, you can enter the requested information in the following tabs. It is highly encouraged that you complete these tabs in the order they appear.

Details

1. Enter **Organization** and **Project Lead Information** (i.e. Financial Status, EIN Number, Organizational History, Capacity and Mission, etc.).
2. Fill out information regarding your **Project Summary** (i.e. Project Name, Background, Objectives, Methods and Outcomes, etc.).
3. Use drop-down menus to complete the **Project Information** section (i.e. Engagement Award Type, Previously Funded, Collaborations with PCORnet Entities).
4. Complete the **Authorizations** section and select '**Yes**' to certify that you are authorized to submit this Application.
5. Click '**Save & Next**' to continue 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 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.	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. ' <ul style="list-style-type: none"> ➤ <i>Note: All uploaded documents must be in PDF, Word, or Excel format. Please reference the PFA guidelines for more information.</i>
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. <ul style="list-style-type: none"> ➤ <i>Note: If the AO rejects the Application, the status will be updated to 'Draft' and the Application will be editable for updates.</i> ➤ <i>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.</i>
7.	When you have completed your review of the Application and entered a decision, click ' Save. ' <ul style="list-style-type: none"> ➤ <i>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.</i>

8.	When you are ready to submit the Application to PCORI, click 'Review/Submit.'
9.	<p>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.'</p> <ul style="list-style-type: none"> ➤ <i>Note: You can confirm the Application's submission on the LOI/Application Dashboard, where the External Status will be 'Submitted – AO Approved.'</i>
<p><i>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.</i></p>	

