PCORI Online: Pre-Award User Guide for Engagement Award: PPRN Limited Competition

Application Submission
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Introduction

PCORI funds projects that answer patient-centered questions about health and health care. These awards support projects that encourage active integration of patients, caregivers, clinicians, and other healthcare stakeholders as integral members of the patient-centered outcomes research/clinical effectiveness research (PCOR/CER) enterprise. Our Funding Center lists all open funding announcements, as well as upcoming and past opportunities.

The new PCORI Online platform provides a “one-stop shop” for all aspects of the award lifecycle, including Application submission, progress reporting, project monitoring, and more. Through the updated system, Applicants can easily submit a full Application to a PCORI funding opportunity.

The following section will detail how to submit a full Application to the PPRN Limited Competition funding opportunity through the new PCORI Online.
Section 1: EAIN: PPRN Limited Competition Application Submission

Applying for a PPRN Limited Competition Engagement Award is a one-step process. 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.

The Applicant will complete their Application and submit it to their Administrative Official (AO) for review and approval. Once the AO approves and submits the Application, PCORI Staff will review for administrative compliance and responsiveness to the funding announcement.

This section provides guidance on how to:
1. Navigate to the Application
2. Update and Submit the Application for AO Approval
3. Approve the Application and Submit to PCORI
1.1 Navigate to the Application

   a. If you are an existing user, enter your User Name and Password, and click ‘Log in.’
      i. If you need to reset your password, click ‘Forgot your password?’ Navigate to the Appendix for further instructions.
   b. If you are a new user, click ‘New User?’ Navigate to the Appendix for further instructions.

**Note:** Your User Name is the email address you use when interacting with PCORI.
2. Once signed in, you will be directed to the PCORI Online home screen. The home screen allows you to access Advisory Panels, Merit Reviews, Engagement Awards, Research and D&I Awards, Infrastructure, and Pipeline to Proposal Awards, and the Ambassador Program.
   a. Depending on the size of your screen, you may need to scroll down this page to access all sections.
3. Click the ‘Engagement Awards’ button.
4. Click the 'Create PPRN Limited Competition Proposal' button.
5. Review the EAIN: PPRN Limited Competition description and instructions, then click 'Apply.'
1.2 Update and Submit the Application for AO Approval

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:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Definition</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Use ‘Save’ to automatically save all information entered into the Application.</td>
<td></td>
</tr>
<tr>
<td>Save &amp; Next</td>
<td>Use ‘Save &amp; Next’ to automatically save the information entered into the Application, as well as navigate to the next tab.</td>
<td></td>
</tr>
<tr>
<td>Cancel</td>
<td>Use ‘Cancel’ to clear any unsaved changes made on the current tab.</td>
<td></td>
</tr>
<tr>
<td>Review/Submit</td>
<td>Use ‘Review/Submit’ when you have completed all tabs of the Application, and are ready to submit to PCORI.</td>
<td></td>
</tr>
<tr>
<td>Clear Changes</td>
<td>Use ‘Clear Changes’ when you want to clear out all text entered in Application prior to saving.</td>
<td></td>
</tr>
</tbody>
</table>
Please also keep in mind the following user roles and definitions:

### Applicant Project Team

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

### PCORI Staff

<table>
<thead>
<tr>
<th>User Role</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contracts Administrator (CMA)</td>
<td>PCORI’s primary contracts Point of Contact (POC) for the project(s).</td>
</tr>
<tr>
<td>Program Associate (PA)</td>
<td>PCORI Staff member responsible for supporting the Program Officer on projects.</td>
</tr>
<tr>
<td>Program Officer (PO)</td>
<td>PCORI’s primary manager for Engagement Award projects.</td>
</tr>
</tbody>
</table>

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

### Application Tabs

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td>Provide Organization and Project Lead Information.</td>
</tr>
<tr>
<td>Key Personnel</td>
<td>Add the names of Project Personnel who will make up the Awardee Project team.</td>
</tr>
<tr>
<td>Attachments</td>
<td>Upload related documents to Application resources, templates are provided. Please note: The Board of Directors List is not a required document for this Application.</td>
</tr>
<tr>
<td>Budget</td>
<td>Provide details related to the budget of the project.</td>
</tr>
</tbody>
</table>
1.2.1 **Details Tab**: Provide organization and Project Lead Information.

1. Complete the **Details** tab through open-ended questions, drop-down menus, and multi-select lists. Enter additional information regarding the following sections:

   - **Organization and Project Lead Information**
   - **Project Summary**
     - **Short Project Title**: Include PPRN Affiliation
   - **Project Information and Authorizations**
2. Complete the remaining fields.
3. Click ‘Yes’ to certify that you are authorized to submit this Application to PCORI.
4. Click ‘Save & Next.’
1.2.2 **Key Personnel:** Add the names and details of Key Personnel who will make up the Awardee Project team.

1. On the **Key Personnel** tab, click ‘+New’ to add new personnel record. Examples of Key Personnel include, but are not limited to, any Designees, Finance Officer, 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.

You may enter up to five key personnel records. Do not include details regarding your Project Lead.
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 2-4.

6. When you have finished adding Key Personnel, click ‘Next’ to navigate to the **Attachments** tab.
1.2.3 **Attachments:** Download any applicable templates, and upload attachments.

1. Download the Application templates.
   a. You can also find a list of all applicable templates on the [PCORI Funding Opportunities Page](#).
2. To upload completed templates and documents, 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. The **Budget** document must be uploaded in Excel format. The **Workplan** document must be uploaded in Word format. Please reference the PFA guidelines for more information.
3. Click ‘Save & Next’ to navigate to the Budget tab.
1.2.4 **Budget:** Provide details related to the budget of the project. The budget length is **two years**.

1. To begin creating the Budget, click ‘**New**.’
2. Enter the subtotal dollar amount for each of the following line items for both Year 1 and Year 2 of your requested budget:
   - Personnel
   - Consultant
   - Supply
   - Travel
   - Other Expenses
   - Subcontractor
   - Indirect Costs
3. Click ‘Save’ to save the new Budget record, and you will return to the Budget tab.

4. To ‘Delete,’ ‘Edit,’ or ‘View’ the existing Budget, navigate to the Action column and click the applicable button.
1.2.5 **Review/Submit**

1. When you have completed the Application, and are ready to submit, click ‘**Review/Submit**.’
2. You will be taken to a read-only view of the Application.
   a. If you would like to continue editing the Application, click ‘**Back to Record**.’
   b. To print the Application, click ‘**Print**.’
   c. When you have fully reviewed the Application, and you are ready to submit to the AO for approval, click ‘**Submit**.’
   d. In the pop-up message, click ‘**OK**’ to verify your submission.

**Note:** Upon submission, the Applicant will receive an email notification.
1.3 Approve the Application and Submit to PCORI (AO)

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 on the magnifying glass icon (🔍).

**Note:** Once the Application is submitted for AO approval, all members of the Applicant team will still be able to access the read-only view of the Application through the LOI/Application Dashboard.
3. Click on the icon under the AO Approve/Withdraw column () to approve, reject, or withdraw the submitted Application.

**Note:** The Application is currently read-only. If updates are necessary, the AO should reject the Application, at which point it will become editable again for the PL to update.
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 menu to ‘Approve’ or ‘Reject’ the submitted Application.
7. 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.
8. When you have completed your review of the Application and entered a decision, click ‘Save.’
9. When you are ready to submit the Application to PCORI, scroll to the top and click ‘Review/Submit.’
10. You will be taken to a read-only view of the AO Decision.
   a. If you would like to update the AO Approval / Withdraw decision, click ‘Back to Record.’
   b. To print the Approval Record, click ‘Print.’
   c. When you are ready to submit the Application to PCORI, click ‘Submit.’

11. You can confirm the Applications submission on the Application Dashboard, where the External Status will be ‘Submitted-AO-Approved.’

**Note:** If the AO rejects the Application, the status will be updated to ‘Draft’ and the Application will be editable for updates.
12. 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 then be notified at a later date by PCORI Staff whether the Application has been awarded.
Appendix

A.1 Retrieve a Forgotten Password

2. If you do not know or have forgotten your PCORI Online password, click ‘Forgot your password?’ to retrieve it.
3. In the following screen, enter your User Name (i.e. your email address), and click ‘Reset Password.’
4. After submission, you will receive a system-generated email with instructions on how to reset your password.
A.2 Register as a New User

2. Click the ‘New User?’ link.
3. On the following page, enter information in the required fields (designated with a red asterisks*), and create a password.
4. Click ‘Join PCORI Portal.’

Note: After creating an account and logging into PCORI Online, email the PCORI Help Desk at help@pcori.org to gain access to the applicable Application(s) and/or Project(s).
5. From here, the **Contact Information** page will appear asking you to submit additional information.
6. Select **Engagement Awards** when asked ‘**What are you applying for?**’.
7. After entering in all required information, click ‘**Submit.**’

**Note**: After creating an account and logging in to PCORI Online, email the PCORI Help Desk at [help@pcori.org](mailto:help@pcori.org) to gain access to the applicable Project(s).
A.3 Manage Profile
On the home screen, there is a page called My Profile, where you can update your account information, including your personal information, email address, and security settings.

1. Click the 'My Profile' tab.

2. Review the page for information such as your name, phone number and mailing address.
3. If the information needs to be updated, click ‘Edit.’ The system will display a screen that will allow you to update your personal information.
4. Once updated, click ‘Save.’
5. To update your email address, click the 'Email Address Change Request' button. An email request will pop up allowing you to send an email to PCORI requesting that a new email address is entered in the system on your behalf.
6. To edit information about your current employer, click the button named ‘Edit Employer Details.’
   a. In the new window, search for your current employer.
      i. If found, enter your position, your department, and click ‘Save’ to keep the information.
      ii. If unable to find your employer, select ‘Employer not found’ and a new window will pop up that allows you to enter information which PCORI Staff will use to add your employer.
      iii. If you are currently unemployed, you can select ‘Unemployed’ and the system will allow you to save without the need to enter any employer information.
7. To edit your personal settings, click 'My Settings' at the top right of any page. The menu that pops up provides settings that you can alter relative to your user experience.
8. Under **Location Settings**, you can change your location information such as your time zone.
   a. Ensure that your language, locale, and time zone are all correct, and click ‘**Save**.’

![Location Settings](image)

9. Under **Security Settings**, enter your current password, and your new password, and click ‘**Save**.’

![Security Settings](image)