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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 Letter of Inquiry (LOI) and subsequent full Application to a PCORI funding opportunity.

The following sections detail how to submit an LOI and subsequent full Application to a PCORI funding opportunity through the new PCORI Online.
Section 1: EA Letter of Inquiry (LOI) Submission

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.

PCORI Staff will screen the LOIs based on the criteria outlined in the Engagement Award and invite full Applications only from those Applicants whose proposed project best fits with programmatic requirements and priorities. Funding announcements and details are posted on our website. Before submitting a LOI or Application, please be sure to navigate to the Funding Center to access additional resources, including What & Who We Fund, What You Need to Know to Apply, and Applicant Training.

Note: Engagement Award Initiative Notice (EAIN) Applicants will only submit a full Application; LOIs are not required for EAIN funding announcements. If applying for an EAIN, navigate directly to Section 3 for the Application process.

This section provides guidance on how to:

1. Navigate to and Select a New Funding Opportunity
2. Navigate to a Draft Letter of Inquiry (LOI)
3. Complete and Submit a Letter of Inquiry (LOI)
1.1 Navigate to and Select a Funding Opportunity

1. Log-in to PCORI Online ([https://pcori.force.com/engagement](https://pcori.force.com/engagement)).
   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 home screen. The home screen allows you to access **Advisory Panels, Merit Review, Engagement Awards, Research Awards**, the **Ambassador Program, D&I Awards, Infrastructure Awards** and **Pipeline to Proposal Awards**.
   a. Depending on the size of your screen, you may need to scroll down this page to access all of these areas.
3. Click the ‘**Engagement Awards**’ button.
4. Click ‘Create LOI.’

**Engagement Award Initiative Notice:**
Meeting and Conference Support

**Create New Letter of Inquiry (LOI)**

- Click the “Create LOI” button.
- Complete as much information as you have. You can return to the portal when you get more information. You must click “Save” to save your entry prior to exiting the system.

**Access Saved LOI**

- Click the “Engagement Awards Dashboard” button. You will see a list of all unsaved LOIs.
- Click the “Edit” icon next to the name of the LOI you would like to continue working on.

**Access Full Proposal**

- If your LOI has been selected to continue to full proposal, access the full proposal for entry by clicking on the “Engagement Awards Dashboard” button. You will see a list of all your unsaved full proposals.
- Click the “Edit” icon next to the name of the full proposal you would like to continue working on.
- Enter as much information as you have. You can return to the portal to continue completing your full proposal. You must click “Save” to retain the information you have entered prior to exiting the system.
5. Review the Engagement Award description and instructions then click 'Apply.'
1.2 Navigate to a 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.

2. Click the ‘Engagement Awards’ button.
3. Click 'Engagement Awards Dashboard' to navigate to the LOI/Application Dashboard.

**Engagement Award**

**Create New Letter of Inquiry (LOI)**
- Click the "Create LOI" button.
- Complete as much information as you have. You can return to the portal when you get more information. You must click "Save" to save your entry prior to exiting the system.

**Access Saved LOI**
- Click the "Engagement Awards Dashboard" button. You will see a list of all unsaved LOIs.
- Click the "Edit" icon next to the name of the LOI you would like to continue working on.

**Access Full Proposal**
- If your LOI has been selected to continue to full proposal, access the full proposal for entry by clicking on the "Engagement Awards Dashboard" button. You will see a list of all your unsaved full proposals.
- Click the "Edit" icon next to the name of the full proposal you would like to continue working on.
- Enter as much information as you have. You can return to the portal to continue completing your full proposal. You must click "Save" to retain the information you have entered prior to exiting the system.

**Engagement Award Initiative Notice: Meeting and Conference Support**

**Create Meeting and Conference Support Proposal**
- Click the "Create Meeting and Conference Support Proposal" button.
- Enter the information into the web form. Once you hit submit, you will return to this page.
- Click the "Engagement Awards Dashboard" button. You will see a list of all your unsaved full proposals including the one with the "project name" you just entered.
- Enter as much information as you have. You can return to this portal to continue completing your full proposal. You must click "Save" to retain the information you have entered prior to exiting the system.

**Access Saved Full Proposal**
- Click the "Engagement Awards Dashboard" button. You will see a list of all your unsaved full proposals.
- Click the "Edit" icon next to the name of the full proposal you would like to continue working on.
4. On the left-side menu, click ‘LOIs.’
5. Under **Open Items**, locate the draft LOI you would like to continue editing, and click the button to edit ( ).
1.3 Complete and Submit the LOI

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:

<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 LOI.</td>
<td></td>
</tr>
<tr>
<td>Save &amp; Next</td>
<td>Use ‘Save &amp; Next’ to automatically save the information entered into the LOI, as well as navigate to the next tab.</td>
<td></td>
</tr>
<tr>
<td>Cancel</td>
<td>Use ‘Cancel’ to exit out of the LOI at any point.</td>
<td></td>
</tr>
<tr>
<td>Review/Submit</td>
<td>Use ‘Review/Submit’ when you have completed all tabs of the LOI, 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 LOI prior to saving.</td>
<td></td>
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Please also keep in mind the following user roles and definitions:

<table>
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<tr>
<th>Applicant Project Team</th>
<th>PCORI Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>User Role</strong></td>
<td><strong>Definition</strong></td>
</tr>
<tr>
<td>Administrative Official (AO)</td>
<td>Responsible for the proper administration of the contract, including overseeing the submission of the LOI and/or 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>
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<td><strong>User Role</strong></td>
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<tr>
<td>Contracts Administrator (CA)</td>
<td>PCORI’s primary contracts point of contact (POC) for the project(s).</td>
</tr>
<tr>
<td>Engagement Awards Program Manager (PM)</td>
<td>PCORI’s primary Program Manager for Engagement Awards project(s).</td>
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<td>Program Officer (PO)</td>
<td>PCORI Staff member responsible for supporting the Program Manager on projects.</td>
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The following steps will walk through the LOI form, which contains the following tabs:

<table>
<thead>
<tr>
<th><strong>LOI Tabs</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contact Information</strong></td>
</tr>
<tr>
<td><strong>Pre-Screen Questionnaire</strong></td>
</tr>
<tr>
<td><strong>Details</strong></td>
</tr>
</tbody>
</table>
1.3.1 **Contact Information**: Add basic contact information for the Project Lead and Organization/Institution.

1. Click the magnifying glass icon to open the Lookup window. Search for and select the names of your PL, AO, and Organization.
   a. Only Project Personnel with active PCORI Online accounts will appear in the Lookup search results. For instructions on how additional team members can create a PCORI Online account, navigate to the Appendix.
2. Click ‘Save & Next’ to continue to the next tab, Pre-Screen Questionnaire.
Pre-Screen Questionnaire: Respond to the initial screening question.

1. Read the bulleted information at the top of the page.
2. Use the drop-down menu to select ‘Yes’ or ‘No’ as your response to the question.
3. Click ‘Save & Next’ to continue to the next tab, Details.

Note: If you answer ‘Yes’ to this question, your LOI may be considered out of scope.
1.3.3 **Details**: 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 in the following sections:
   - Organization and Project Lead Information
   - Project Summary
   - Project Information and Authorizations

![PCORI Portal Engagement Awards](image)

- New Organization and Project Lead Information
  - Please indicate your organization’s financial status:
    - [ ] --None--
  - Other financial status (please specify):
    
  - Organization’s EIN Number
    
    Applicants outside of the United States should enter 999-99-9999 as an EIN.
2. Complete the remaining fields.
3. Click ‘Yes’ to certify that you are authorized to submit this LOI.
4. Click ‘Save.’
1.3.4 Review/Submit

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

➢ **Note:** An error message will appear if you have not completed all the required LOI form fields.

Once the LOI has been submitted, an email notification will be sent informing the Applicant of the submission.
3. While the submitted LOI is being reviewed, you can access a read-only version through the LOI/Application Dashboard.
   a. On the Open Items tab, click the magnifying glass icon (Q) to view a read-only version of the submitted LOI.
   b. If you wish to withdraw your LOI after it has been submitted, please email ea@pcori.org.
Section 2: EA Application Submission

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, PCORI Staff will review for administrative compliance and responsiveness to the funding announcement.

If you have any questions while completing your Application, please reach out to ea@pcori.org. Due to the volume of requests PCORI receives, Applicants should submit the request early.

Note: If applying for an Engagement Awards Initiative Notice (EAIN), navigate directly to Section 3 for the Application process.

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
2.1 Navigate to the Application

1. If your LOI has been approved and you are invited to submit a full Application, you will receive an email notification with further instructions. You can then navigate to the pre-populated draft Application through PCORI Online ([https://pcori.force.com/engagement](https://pcori.force.com/engagement)).
2. Click the ‘Engagement Awards’ button.
3. Click **Engagement Awards Dashboard** to navigate to your draft Application.

### Engagement Award

**Create New Letter of Inquiry (LOI)**

- Click the “Create LOI” button.
- Complete as much information as you have. You can return to the portal when you get more information. You must click “Save” to save your entry prior to exiting the system.

### Access Saved LOI

- Click the “Engagement Awards Dashboard” button. You will see a list of all unsaved LOIs.
- Click the “Edit” icon next to the name of the LOI you would like to continue working on.

### Access Full Proposal

- If your LOI has been selected to continue to full proposal, access the full proposal for entry by clicking on the “Engagement Awards Dashboard” button. You will see a list of all your unsaved full proposals.
- Click the “Edit” icon next to the name of the full proposal you would like to continue working on.
- Enter as much information as you have. You can return to the portal to continue completing your full proposal. You must click “Save” to retain the information you have entered prior to exiting the system.

### Engagement Award Initiative Notice: Meeting and Conference Support

**Create Meeting and Conference Support Proposal**

- Click the “Create Meeting and Conference Support Proposal” button.
- Enter the information into the web form. Once you hit submit, you will return to this page.
- Click the “Engagement Awards Dashboard” button. You will see a list of all your unsaved full proposals including the one with the “project name” you just entered.
- Enter as much information as you have. You can return to this portal to continue completing your full proposal. You must click “Save” to retain the information you have entered prior to exiting the system.

### Access Saved Full Proposal

- Click the “Engagement Awards Dashboard” button. You will see a list of all your unsaved full proposals.
- Click the “Edit” icon next to the name of the full proposal you would like to continue working on.
4. You will be navigated to the LOI/Application Dashboard. On the left-side menu, click ‘Applications.’
5. Search for the draft Application you would like to edit, and click the button to edit (✓).
2.2 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:

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

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**PCORI Staff**

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<td>Program Officer (PO)</td>
<td>PCORI Staff member responsible for supporting the Program Manager on projects.</td>
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</tbody>
</table>
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 submitted LOI.

<table>
<thead>
<tr>
<th>Application Tabs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Details</strong></td>
</tr>
<tr>
<td><strong>Key Personnel</strong></td>
</tr>
<tr>
<td><strong>Attachments</strong></td>
</tr>
<tr>
<td><strong>Budget</strong></td>
</tr>
</tbody>
</table>

If you have any questions, please reach out to ea@pcori.org.
2.2.1 Review Information Pre-populated from LOI in Details Tab

1. The Details tab has been pre-populated from your LOI submission. Review and update this section as needed. For additional guidance on this tab, please refer to section 1.3 Complete & Submit a Letter of Inquiry (LOI).

➢ Note: Email ea@pcori.org if any changes need to be made regarding the Organization Name, Administrative Official, or Project Lead.
2. Once you have reviewed and updated the pre-populated Details tab as necessary, click ‘Yes’ to certify that you are authorized to submit this Application.

3. Click ‘Save & Next’ to continue to the next tab, Key Personnel.
2.2.2 **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 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.

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.
2.2.3 **Attachments:** Download any applicable templates and upload attachments to include with the Application.

> Applicable templates may include: Board of Directors, Workplan, Budget, Budget Justification, Biosketch.

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.
2.2.4 **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
   - Subcontractor
   - Indirect Costs

![Budget creation interface](image)
4. Click ‘Save’ after you have completed all fields.
5. To ‘Delete,’ ‘Edit’ or ‘View’ the existing Budget, navigate to the ‘Action’ column and click the applicable button.
2.2.6 Review/Submit

1. When you have completed the Application, and you 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 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, Applicant will receive an email notification.
2.3 Approve the Application and Submit to PCORI (AO)

Once the Application is submitted for internal approval, the Administrative Official (AO) can log-in to PCORI Online (https://pcori.force.com/engagement) 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 on the magnifying glass icon ( Q ).

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 the icon under the AO Approve/Withdraw column (छ) 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 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 an approval decision, click ‘Save.’
9. When you are ready to submit the Application to PCORI, scroll to the top of the page and click ‘Review/Submit.’

**Note:** 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.
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 Application submission on the LOI/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.
Section 3: EAIN Application Submission

Applying for an Engagement Award Initiative Notice (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.

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

Return to Table of Contents
3.1 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 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 tiles.

3. Click the 'Engagement Awards' button.
4. Click ‘Create Meeting and Conference Support Proposal.’
5. Review the Engagement Award Initiative Notice description and instructions, then click ‘Apply.’
3.2 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:

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<tr>
<td>Project Lead (PL)</td>
<td>Institution’s primary Point of Contact (POC) throughout the lifecycle of the contract award; responsible for the <strong>programmatic conduct</strong> of the Application and project.</td>
</tr>
<tr>
<td>PL Designee</td>
<td>An individual selected by the <strong>Project Lead (PL)</strong> to act as a <strong>backup or alternate</strong>.</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 <strong>contracts</strong> point of contact (POC) for the project(s).</td>
</tr>
<tr>
<td>Engagement Awards Program Manager (PM)</td>
<td>PCORI’s primary <strong>Program Manager</strong> for Engagement Awards project(s).</td>
</tr>
<tr>
<td>Program Officer (PO)</td>
<td>PCORI Staff member responsible for <strong>supporting the Program Manager</strong> on 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.</td>
</tr>
<tr>
<td>Budget</td>
<td>Provide details related to the budget of the project.</td>
</tr>
</tbody>
</table>
3.2.1 **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**
   - **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.’
3.2.2 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.
3.2.3 **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.’

![PCORI Portal EAIN: Meeting And Conference Support](image)

**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.
3.2.4 **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,’ or ‘View’ the existing Budget, navigate to the **Action** column and click the applicable button.
3.2.5 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.
3.3 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 ((__('icon')) 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 Application 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**.’

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