

PCORI Online Cheat Sheet: PCORI Information Request (PIR)

Updated as of 8/23/2018

Important Reminders

This Cheat Sheet provides guidance on how to:

- Navigate to the PCORI Information Request (PIR) Letter
- Upload & Submit Requested Files

Please keep in mind the following user roles:

User Role	Definition
Principal Investigator (PI)	Institution's primary Point of Contact (POC) throughout the lifecycle of the project, from LOI submission to project completion; is responsible for the programmatic conduct of the project.
PI Designee	An individual selected by the Principal Investigator (PI)/ 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.

During the PCORI Information Request (PIR) phase of the LOI & Application process, PCORI staff can send the Applicant a list of questions and concerns for response by a given deadline. If budget updates are requested in the PIR, the Applicant will be able to update and resubmit their budget through the PIR process. The image below illustrates the PIR review and submission process.



1. Navigate to the PCORI Information Request (PIR)

If PCORI has requested additional information regarding administrative or programmatic details of your project, you will receive a PCORI Information Request (PIR) notification via email.

Navigate to PIR Detail page via PCORI Online

1.	Log-in to PCORI Online .
2.	Click the button for the area of funding you are applying for (i.e., Research Awards, Engagement Awards).

3.	Click 'My LOIs and Applications.'
4.	At the top of the page, find the statement "If you received a PCORI Information Request (PIR), click here to view your list of requests." Click the 'here' hyperlink to view your list of requests.
5.	Click the PIR Number to view the PIR Detail page.

Navigate to PIR Detail page via Email

1.	Open the PIR notification email . The email subject will be <i>PCORI Information Request (PIR #)</i> .
2.	Click the link to 'Access Your PCORI Information Request' to navigate to the PIR Detail page.
3.	Log-in to PCORI Online , if you are not already signed in.
4.	After you log-in, you may need to re-click on the link in the email (step 2).

You have now accessed the PIR Detail page.

2. Respond to the PIR

Review the administrative and programmatic questions listed on the PIR and submit requested files in PCORI Online. In some cases, PCORI staff may also request that you modify and resubmit a Working Budget for your project.

Review PIR and Upload Requested Files

1.	Review the PIR details, including the PIR Response Deadline , and Programmatic and Administrative Questions .
2.	Review the Guidelines for Submission .
3.	Complete response(s) to the Programmatic and Administrative Questions in a file on your computer (i.e. Word or Excel document), as stated in the Guidelines for Submission.
4.	To attach the response file(s), scroll down to the Notes & Attachments section.
5.	Click the 'Attach File' button.
6.	On the next page, click 'Choose File.' Select the applicable file(s) from your computer, and click 'Open.'
7.	Click 'Attach File,' then click 'Done.'
8.	To upload additional documents or responses, repeat steps 4-7.

Update the Budget & Resubmit Changes to PCORI for Approval (If Applicable)

1.	From the PIR Detail page, scroll down to the Budget List section.
2.	Click the 'Edit' link next to the budget that has a status of 'Working Budget – Pending Submission.'
3.	You will be navigated to a working version of the Budget that you submitted during your Application. <ul style="list-style-type: none"> ➤ <i>The Working Budget is editable in a paginated format, with each page detailing the budget for a certain category.</i>

4.	Navigate through the pages of the Budget using the drop-down menu in the top left corner. ➤ <i>Alternatively, you can use the 'Next Page' and 'Previous Page' buttons to navigate through the pages of the Working Budget.</i>
5.	Make any necessary changes to the budget. For instructions on how to edit each page of your budget, reference the Appendix. Save all changes before proceeding to the next page.
6.	Upon finalizing edits to the budget, navigate back to the final page, Budget Summary .
7.	Click ' Submit for Review ' and then ' Submit ' on the pop-up to submit the modified Budget back to PCORI for review. ➤ <i>The Budget will now have a status of 'Working Budget – Submitted' and will no longer be editable. Additionally, you will receive an email confirmation of your Budget submission.</i>
8.	After submitting your budget, you will be navigated back to the PIR Detail page. If you are resubmitting your Budget Justification, navigate to the Notes & Attachments section to upload the updated file.

Submit PIR

1.	After submitting you budget and uploading all necessary files, you will be navigated back to the PIR Detail page.
2.	Click ' Submit Response ' to complete your PIR submission.

You have now responded to the PIR, and if applicable, submitted a working budget for PCORI to review and approve. If PCORI requires additional updates on your PIR response or the resubmitted budget, you will receive an email requesting further edits. You will repeat these steps to submit a response. Once your PIR response is accepted, you will still be able to access the PIR record in PCORI Online. Refer to the steps in Section 1 for how to navigate to your list of PIR records.

Appendix

Editing the Working Budget

The Working Budget consists of the following eleven pages. The first ten pages require input and the final page will provide a summary:	
<ul style="list-style-type: none"> Project Personnel, Consultant Cost, Supplies, Scientific Travel, Programmatic Travel, Other Expenses, Equipment, Subcontractor Direct, Subcontractor Indirect, Detailed Budget - Total Prime Indirect, and Budget Summary 	
1.	On the first page of the Working Budget, Project Personnel , enter the Start Date and End Date (365 days later) for each year of the project. Click ' Save All Rows ' after entering all dates. ➤ <i>If your proposed project is less than 5 years, you must populate a date value for the Start Date and End Date fields for all years, including the Peer Review Period. When you enter the Start and End date for each year of the project on any Budget page, the dates will be copied over to the remaining pages.</i>
2.	Click ' Add Row ' to add a budget line item. Input requested information and click ' Save Rows ' when finished editing each row.
3.	Continue to add line items for Year 1 by repeating step 2.
4.	To copy these details across all remaining years, select the applicable rows using the Select Row checkbox and click ' Copy Selected Rows To All Years '.

5.	<p>To delete rows, select the rows you wish to remove using the Select Row checkbox and click 'Delete Selected Rows'.</p> <ul style="list-style-type: none"> ➤ <i>If your proposed project is less than 5 years, ensure that you delete the copied rows after your proposed project End Date.</i>
6.	<p>Once you have completed each year of the proposed project on the budget page, click 'Save All Rows'.</p>
7.	<p>Use the drop-down menu, or the 'Next Page' and 'Previous Page' buttons located at the top and bottom of each page, to navigate between pages.</p> <ul style="list-style-type: none"> ➤ <i>Be sure to click 'Save All Rows' before navigating away from any Budget page.</i>
8.	<p>Repeat steps 2-7 to update the remaining Budget pages.</p> <ul style="list-style-type: none"> • Consultant Cost, Supplies, Scientific Travel, Programmatic Travel, Other Expenses, Equipment, Subcontractor Direct, Subcontractor Indirect, and Detailed Budget - Total Prime Indirect.
9.	<p>Note that Detailed Budget – Total Prime Indirect page has a different format. Enter 'Total Prime Indirect Cost' and 'Applicable Rate' for each year.</p> <ul style="list-style-type: none"> ➤ <i>If your proposed project is less than 5 years, you must enter '0' for cost/rate for all remaining years.</i>
10.	<p>Navigate to the final page, Budget Summary, and review this page for accuracy.</p> <ul style="list-style-type: none"> ➤ <i>Some costs are not applicable in the Peer Review Period (or Year 6 for D&I awards) and will be labeled "N/A." Subtotals and Totals are automatically calculated.</i>