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🔍 **Note:** The following browsers are recommended when using PCORI Online.

![Chrome, Safari, Firefox](image-url)

**Note:** Confirm that cookies are enabled for any browser used.
1.1.1.1. HOW TO LOG IN TO THE PCORI PORTAL

Summary

Use the following procedure to log in to the PCORI System to submit invoices.

Steps

1. Select the following link to access the Salesforce.com site:
   https://pcori.force.com/engagement

2. Type your user name and password into the respective fields and select Log in.

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is your first time logging in to the Salesforce.com PCORI Internal site,</td>
<td>You will be prompted to create a new password.</td>
</tr>
<tr>
<td>You have previously logged in to the site,</td>
<td>You will be taken directly to the PCORI Internal Home page.</td>
</tr>
</tbody>
</table>

☑️ Result: The Welcome to the PCORI Portal page will display.
1.1.1.2. HOW TO SUBMIT AN INVOICE FOR A COST-REIMBURSABLE RESEARCH AWARD

Summary
Use the following procedure to submit an invoice for a Cost-Reimbursable Research Award.

Steps
1. Go to the PCORI Research Awards section and select Research Awards.
Steps

The Research Awards portal page will display.

2. Select My Projects.

The My Research Awards Projects screen will display.

🔍 Note: You can view a list of all your Awards by selecting the dropdown arrow and choosing All Awards.
3. Select the **Short Project Title** link from the list of projects returned.

The **Project Detail** screen for your award will display.
4. Select the Invoices link.

The Invoices section will display.

Select New Invoice to begin creating an invoice.

The Create a New Invoice screen will display.

5. In the Invoice Edit section, type the Institute Invoice Number into the corresponding field. In this case, let’s type “Test123456.”
6. To enter the award period, begin by selecting the **Start of Billing Period** drop-down calendar and selecting a start date. In this case, select **6/1/2017**.

7. Next, select the **End of Billing Period** drop-down calendar to select an end date for the project. In this case, select **9/14/2017**.

- **Note:** The contract start date and end date are provided in the Period of Performance dates listed on the **New Invoice** screen. As a result, the date the Awardee enters for the Start of Billing Period should not precede the Period of Performance dates.

- **Note:** In contrast, some awards allow invoice to be submitted 90 days prior to the performance date. Check your contract to see if this 90 day period applies to your Award.

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
</table>
| The End of Billing Period date entered precedes the Start of Billing Period date, | The following error message will display: “End of Billing Period date is before the Start of Billing Period date. Please correct before saving.” | **Resolution:**
<p>| | Correct the date entry by providing a Start of Billing Period date that precedes the End of Billing Period date. |</p>
<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
</table>
| The Start of Billing Period date precedes the contract start date displayed in the Period of Performance date on the screen by more than 3 months, | The following error message will display: “Start of Billing Period is prior to the contract start date.”  

**Resolution:**  
Log in to PCORI Online and refer to the fully executed contract and all modifications in the Notes and Attachments section of the project page. Check your contract to see if this 90 day period applies to your Award. Correct the date entry and proceed to the next step. |
| The billing period entered is for a day in the future,                                                             | The following error message will display: "End of Billing Period Date is in the future. Correct and submit."  

**Resolution:** Log in to PCORI Online and refer to the fully executed contract and all modifications in the Notes and Attachments section of the project page. If you feel the dates provided are correct as entered, add a note in the Notes and Attachments section to support the billing period date entry, otherwise correct the date entry by entering a date that is not in the future and proceed to the next step. |
| The End of Billing Period date entered falls after the end date for Period of Performance, which is the contract end date, | The following message will display: “Expenses fall outside project end date. Verify that all costs were incurred prior to the end date, and include a note in Notes and Attachments section (before submitting for approval) confirming all costs were incurred prior to the project end date.”  

**Resolution:** Log in to PCORI Online and refer to the fully executed contract and all modifications in the Notes and Attachments section of the project page. If you feel the dates provided are correct as entered, add a note in the Notes and Attachments section to support the billing period date entry, otherwise correct the date entry by entering at date prior to the Period of Performance end date and proceed to the next step. |
### How to Submit an Invoice for a Cost-Reimbursable Research Award

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>The billing date overlaps with a previous invoice,</td>
<td>The following message will display: “Current invoice period overlaps with prior invoices. Check dates and make any necessary corrections. Include a note in the Notes and Attachments section to explain the overlap, if intended.”</td>
</tr>
<tr>
<td></td>
<td><strong>Resolution</strong>: Log in to PCORI Online and refer to the fully executed contract and all modifications in the Notes and Attachments section of the project page. If you feel the dates provided are correct as entered, add a note to the Notes and Attachments section to support the billing date overlap, otherwise correct the date entry by providing dates that do not overlap with a previously submitted invoice(s) and proceed to the next step.</td>
</tr>
<tr>
<td>The Research Award expense falls outside of the Period of Performance,</td>
<td>The following message will display: “Research Expenses fall outside Research End Date. Verify that all costs were incurred prior to the End Date, and include a note in “Notes and Attachments” section (before submitting for approval) confirming all costs were incurred prior to the Research End Date.”</td>
</tr>
<tr>
<td></td>
<td><strong>Resolution</strong>: Log in to PCORI Online and refer to the fully executed contract and all modifications in the Notes and Attachments section of the project page. If you feel the dates provided are correct as entered, add a note to the Notes and Attachments section to support the billing date, otherwise correct the date entry by providing a date that falls within the Period of Performance and proceed to the next step.</td>
</tr>
</tbody>
</table>

8. Select **Save** to save the entered information.

The **Project Detail** screen will display.
9. You will notice that the Main Information section provides the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Date</td>
<td>This is the date the created invoice was submitted or today’s date.</td>
</tr>
<tr>
<td>Research End Date</td>
<td>The date that represents end of the research period of the project.</td>
</tr>
<tr>
<td>Invoice Status</td>
<td>The four possible Invoice Status field values are as follows:</td>
</tr>
<tr>
<td></td>
<td>Draft: This invoice can still be edited.</td>
</tr>
<tr>
<td></td>
<td>Submitted-Under Review: This invoice can no longer be edited.</td>
</tr>
<tr>
<td></td>
<td>Rejected: The invoice has been rejected.</td>
</tr>
<tr>
<td></td>
<td>Approved: The invoice has been approved for payment.</td>
</tr>
<tr>
<td>Contract Number</td>
<td>Auto-populated from the project.</td>
</tr>
<tr>
<td>PCORI Invoice Number</td>
<td>The Contract Number – Institute Invoice Number.</td>
</tr>
<tr>
<td>Institution Name</td>
<td>This is the Awardee’s Institution.</td>
</tr>
<tr>
<td>Principal Investigator</td>
<td>This is the Principal Investigator for the project.</td>
</tr>
<tr>
<td>Original Invoice</td>
<td>Identifies the invoice as an original invoice and not a cloned (duplicate) invoice.</td>
</tr>
</tbody>
</table>

*Note: An invoice is cloned once it is rejected, so that edits can be made to it without affecting the original.*
10. In the Grand Total (Current Period Expenses) in USD section, enter the following amounts:

- Total Research Period
- Total Supplement Funding
- Total Peer Review

The amount entered for each category was $100.00.
11. Go to the Research Period Expenses section and enter the current period expenses for each budget category in the corresponding field. This will allow for the verification of each budget category cost.

![Research Period Expenses]

Note: When the Total Research Period field amount and the Research Grand Total field amount do not match and the awardee tries to submit this invoice, the Total Research Period field will appear orange in color as shown below.

![Total Research Period]

The Awardee will receive an error message that prompts them to verify the amounts entered. Discrepancies in total may be a result of the Awardee entering an incorrect amount in the Total Research Period field or entering an incorrect amount in any of the Budget Category fields.
12. Go to the Supplemental Funding Expenses section and enter the **Current Period Expenses** for each budget category in the corresponding field. This will allow for the verification of each budget category cost.

![Supplement Funding Expenses Table]

**Note:** When the Total Supplement Funding Period field amount and the Supplement Grand Total field amount do not match and the awardee tries to submit this invoice, the Total Supplemental Funding field will appear orange in color as shown below.

![Total Supplemental Funding]

The Awardee will receive an error message that prompts them to verify the amounts entered. Discrepancies in totals may be a result of the Awardee entering an incorrect amount in the Total Supplement Funding field or entering an incorrect amount in any of the Budget Category fields.
13. Go to the Peer Review Expenses section and enter the **Current Period Expenses** for each budget category in the corresponding field. This will allow for the verification of each budget category cost.

![Peer Review Expenses Table]

*Note:* When the Total Peer Review field amount and the Peer Review Grand Total field amount do not match and the awardee tries to submit this invoice, the Total Peer Review field will appear orange in color as shown below.

![Total Peer Review Field Orange]

The Awardee will receive an error message that prompts them to verify the amounts entered. Discrepancies in totals may be a result of the Awardee entering an incorrect amount in the Total Peer Review field or entering an incorrect amount in any of the Budget Category fields.

14. Once all information is complete and accurate, select **Save** to save the entered information.

![Save Button]

15. Select **Attach File** to attach a file to the invoice. An attachment is required; therefore, a Microsoft Excel (.xls) or an Adobe PDF (.pdf) file will be attached to the invoice submission.

![Notes and Attachments]

The **Attach File** screen will display.
Step... | Action...
---|---
1 | Type the path of the file or select the file using the **Browse** button.
2 | Select **Attach File**. Repeat Steps 1 and 2 to attach multiple files.
3 | Select **Done** to return to the previous screen.

16. Select **New Note** to enter notes for the invoice.

The **Note Edit** screen will display.
Warning: If you select the Private checkbox on the screen, Internal Reviewers will not be able to view your Note.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Type the title into the Title field.</td>
</tr>
<tr>
<td>2</td>
<td>Type the note into the Body field.</td>
</tr>
<tr>
<td>3</td>
<td>Select <strong>Save</strong> to save the note.</td>
</tr>
</tbody>
</table>

Note: Notes are optional and not required to submit the invoice.
17. Next, select **Submit for Approval**.

The **Main Invoice** page will update.

![Main Invoice Page](image1)

**Result:** Once submitted, the following will occur:

<table>
<thead>
<tr>
<th>Step...</th>
<th>Action...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The “Invoice is successfully submitted for approval” message will display.</td>
</tr>
<tr>
<td>2</td>
<td>The invoice status will change from “Draft” to “Submitted – Under Review.”</td>
</tr>
<tr>
<td>3</td>
<td>All Awardee-entered fields become locked and un-editable.</td>
</tr>
<tr>
<td>4</td>
<td>Notes and Attachments can be added, but not deleted after an invoice is submitted for approval. If attempted the following message will display: “Notes and Attachments cannot be deleted after an invoice is submitted for review. Contact <a href="mailto:help@pcori.org">help@pcori.org</a> for assistance.”</td>
</tr>
</tbody>
</table>
18. Select the **Home** tab to return to the Welcome to PCORI screen.

You have completed the invoice submission process for Cost Reimbursement - Research Award.
1.1.1.3. HOW TO CHECK THE STATUS OF AN INVOICE FOR A COST-REIMBURSABLE RESEARCH AWARD

Summary
Use the following procedure check the status of an invoice that was submitted for a Cost-Reimbursable Research Award.

Steps

Note: Checking the status of a submitted invoice is optional and is not a required step for submitting the invoice.

1. Select the Project link to view the Project Details screen.

![Invoice Details Screen]

- Project Number: INV-0002004
- Status: Successfully submitted for approval

- Main Invoice Information:
  - Project ID: 002020
  - Principal Investigator: [Name]
  - Original Invoice Number: INV-0002004
  - Version: 1

- Budget Category:
  - Total Salaries: $100.00
  - Total Supplementary Funding: $100.00
  - Total Overtime: $100.00

- Research Period Expenses:
  - Subtotal Personnel: $100.00
  - Consultant: $0.00

- Total Research Period: $300.00
- Total Supplementary Funding: $100.00
- Total Overtime: $100.00
- Grand Total (Current Period Expenses): $500.00

- Period of Performance: 10/20/2015 - 09/30/2016
- Start of Billing Period: 10/20/2015
- End of Billing Period: 11/12/2016
- Invoiced Date: 09/16/2017
Steps

2. From the Project Detail screen, select the Invoices link.

3. Review the dashboard details for your invoice.

Note: Notice information, including the Institute Invoice Number; Start of Billing Period date; End of Billing Period date; Invoice Status; and Invoice Status (External), which is displaying as “Submitted Under Review.”

Note The four possible Invoice Status field values are as follows:

- **Draft:** (no flag) This invoice can still be edited.
- **Submitted-Under Review:** (yellow flag) This invoice can no longer be edited.
- **Rejected:** (red flag) The invoice has been rejected.
- **Approved/Paid:** (green flag) The invoice has been approved for payment.
1.1.1.4. HOW TO RESUBMIT AN INVOICE THAT WAS PREVIOUSLY REJECTED BY PCORI

Summary
Use the following procedure to resubmit an invoice to PCORI that has been rejected.

Steps

Note: When your invoice is rejected by PCORI the following will occur:

- You will receive an email which provides a rejection reason and instructions for you to make correction(s) to a new system-created invoice.
- The system-created invoice has the same Institute Invoice Number, a new Invoice ID Number and a status of Draft. Use this new invoice to make updates and edits to the rejected invoice.

1. From the Project Detail screen, review the invoice status in the Invoice Status (External) field. Notice that the status listed is “Rejected”.

![Invoice Status Screenshot]
2. Select Invoices to go to the Invoices section.

3. Review the dashboard details for your invoice. The Invoice Status (External) field has changed from Submitted – Under Review to Rejected. A new invoice was created with the same Start of Billing Period and End of Billing Period and the invoice has the Invoice Status (External) of Draft.

Note: The flag color for the original invoice will change from yellow to red to indicate the rejected status. The new system created invoice with the Draft status will not have a flag.

4. Select the Invoice ID number with the Draft status.

The Main Invoice page will display.
Note: The new invoice will have a status of Draft and the version number will update. In this case the version number is 2 indicating a new invoice.

5. Make the changes based on rejection reasons provided in the email.

6. Once corrections have been made, select Save to save the newly created invoice.

7. Attach your invoice and supporting documentation and select Submit for Approval to submit the updated invoice to PCORI.