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

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

   ![Login Page](image)

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

   ![Login Page](image)

<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.
HOW TO LOG IN TO THE PCORI PORTAL

Advisory Panels
PCORI’s Advisory Panels are charged with advising and providing input to our Board, Methodology Committee, and staff on planning, developing, implementing, and enhancing our work as we build a portfolio of patient-centered comparative clinical effectiveness research.

Merit Review
We conduct rigorous merit reviews of all applications for funding. To select high-quality scientific research, while ensuring patient-centeredness, our review process is distinguished by the full participation of scientists, patients, and other healthcare stakeholders.
You currently do not have any assigned merit review tasks for the current cycle.

Eugene Washington PCORI Engagement Awards
The Eugene Washington PCORI Engagement Awards Program support projects to build a community to participate in PCORI/CER, develop infrastructure for dissemination and actively disseminate PCORI-funded research results, and funding for research-related conferences.

PCORI Research Awards
PCORI’s scientific research portfolio is guided by our National Priorities for Research. Under these National Priorities for Research, PCORI issues Funding Announcements (PFAs) that are either broad calls for investigator-initiated applications or targeted calls for specific topics and research questions.

Ambassador Program
The PCORI Ambassador Program unites individual and organizational Ambassadors around the promise of patient-centered outcomes research (PCOR). The goal is to help patients, organizations, and other stakeholders share PCORI’s vision and mission with their communities, participate as full partners in research, and help ensure the sharing and use of information generated from PCORI-funded projects.
1.1.1.2. HOW TO SUBMIT AN INVOICE FOR A COST-REIMBURSABLE ENGAGEMENT AWARD

Summary

Use the following procedure to submit an Invoice for a Cost-Reimbursable Engagement Award.

Steps

1. Go to the Eugene Washington PCORI Engagement Awards section and select Engagement Awards.

Advisory Panels

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Merit Review

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The Engagement Award portal page will display.

3. Select the project’s Short Project Title link from the project(s) listing.

⚠️ **Note:** You can view a list of all your Awards by selecting the dropdown arrow and choosing All Awards.
The **Project Detail** screen will display.

![Project Detail Screen]

**Note:** The Invoice Type is **Engagement Awards - Cost Reimbursable**. This field is auto populated when the project is created in the system.

4. **Select the Invoices link to display the Invoices section.**
5. Select **New Invoice** to begin creating an invoice.

![New Invoice](image)

The **Create a New Invoice** screen will display.

![Create a New Invoice](image)

*Note:* You cannot create an invoice without inserting values in the following required fields:

a. **Institute Invoice Number**  
   (Each invoice should have a different number.)

b. **Start of Billing Period**

c. **End of Billing Period**

*Note:* All fields marked in red are mandatory.

6. Type the **Institute Invoice Number** into the corresponding field. In this case, let’s type “Test1234556.”

![Create a New Invoice](image)

7. Select the **Start of Billing Period** drop-down calendar to select a start date for the award period. In this case, let’s select **7/11/2017**.

![Start of Billing Period](image)
8. Then, select the **End of Billing Period** drop-down calendar to select an end date for the project. In this case, let’s select **9/13/2017**.

![Start and End of Billing Period](image)

**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>
<tbody>
<tr>
<td>The End of Billing Period date entered precedes the Start of Billing Period date,</td>
<td>The following error message will display: “End of Billing Period date is before the Start of Billing Period date. Please correct before saving.”</td>
</tr>
<tr>
<td><strong>Resolution:</strong></td>
<td></td>
</tr>
<tr>
<td>Correct the date entry by providing a Start of Billing Period date that precedes the End of Billing Period date.</td>
<td></td>
</tr>
</tbody>
</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 |                                                                        |
### HOW TO SUBMIT AN INVOICE FOR A COST-REIMBURSABLE ENGAGEMENT AWARD

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>The End of Billing Period date entered falls after the end date for Period of Performance, which is the contract end date,</td>
<td>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.”</td>
</tr>
<tr>
<td>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.</td>
<td></td>
</tr>
<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>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 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>
<td></td>
</tr>
</tbody>
</table>
9. Select **Save** to save the entered information.

The **Main Invoice** screen will display.

10. 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>Invoice Status</td>
<td>The four possible Invoice Status field values are as follows:</td>
</tr>
<tr>
<td></td>
<td><strong>Draft</strong>: This invoice can still be edited</td>
</tr>
<tr>
<td></td>
<td><strong>Submitted-Under Review</strong>: This invoice can no longer be edited.</td>
</tr>
<tr>
<td></td>
<td><strong>Rejected</strong>: The invoice has been rejected</td>
</tr>
<tr>
<td></td>
<td><strong>Approved/Paid</strong>: The invoice has been approved/paid</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.*
11. In the Grand Total (Current Period Expenses) in USD section, enter the **Total Current Period Expenses** into the corresponding field. In this case, let’s enter “$1000.00.”

![Grand Total (Current Period Expenses) in USD](image)

12. Separate and input the total engagement invoice amount into its corresponding individual **Current Period Expenses** field in the corresponding Project Budget & Current Expenses section. This will allow for verification of each budget category.

![Project Budget & Current Expenses](image)

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

![Grand Total (Current Period Expenses) in USD](image)

The Awardee will receive an error message and that prompts them to verify the amounts entered. Discrepancies in totals may be a result of the Awardee entering an incorrect total engagement invoice amount or entering an incorrect budget category amount.

13. Select **Save**.

**Note:** An invoice can be edited up until the point it is submitted to PCORI. Thereafter, neither the invoice nor any attached files can be modified or deleted. However, once an invoice is submitted to PCORI, the Awardee can add additional attachments to that invoice.
14. 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.

<table>
<thead>
<tr>
<th>Step...</th>
<th>Action...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the file using the <strong>Choose File</strong> button.</td>
</tr>
<tr>
<td>2</td>
<td>Select <strong>Attach File</strong>. Repeat Steps 1 and 2 to attach multiple files.</td>
</tr>
<tr>
<td>3</td>
<td>Select <strong>Done</strong> to return to the previous screen.</td>
</tr>
</tbody>
</table>

⚠️ **Note:** The system will issue an error notice when submitting an invoice if a file is not attached.

15. 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.
Step... | Action...
---|---
1 | Type the note title into the Title field.
2 | Type the note into the Body field.
3 | Select Save to save the note.

16. Next, select Submit for Approval.

The Main Invoice page will update.
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>

17. Select the **Home** tab to return to the **Welcome to PCORI** screen.

You have completed the invoice submission process for Cost Reimbursement – Engagement Award.
1.1.1.3. **CHECKING STATUS OF SUBMITTED INVOICES TO PCORI ONLINE FOR COST-REIMBURSABLE ENGAGEMENT AWARD**

**Summary**
Use the following procedure to check the status of an invoice for a Cost-Reimbursable Engagement Award.

**Steps**

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

1. From the **Project Detail** screen, select the **Invoices** link. The Invoices section will display.

1. 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; and Invoice Status (External), which is displaying as “Submitted Under Review.”
Note The four possible Invoice Status field values are as follows:

- **Draft**: This invoice can still be edited.
- **Submitted-Under Review**: This invoice can no longer be edited.
- **Rejected**: The invoice has been rejected.
- **Approved/Paid**: 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”.

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

<table>
<thead>
<tr>
<th>Invoice ID</th>
<th>Billing Period</th>
<th>Institute Invoice Number</th>
<th>Invoice Status</th>
<th>Total Current Period Expense</th>
<th>Total Final Price Amount</th>
<th>Start of Billing Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>INV-123456</td>
<td>1/1/2019 - 12/31/2019</td>
<td>Inv123456</td>
<td>Submitted - Under Review</td>
<td>31,000.00</td>
<td>0.00</td>
<td>1/1/2019</td>
</tr>
<tr>
<td>INV-234567</td>
<td>1/1/2019 - 12/31/2019</td>
<td>Inv234567</td>
<td>Draft</td>
<td>31,000.00</td>
<td>0.00</td>
<td>1/1/2019</td>
</tr>
<tr>
<td>INV-345678</td>
<td>1/1/2018 - 12/31/2018</td>
<td>Inv345678</td>
<td>Paid</td>
<td>31,000.00</td>
<td>0.00</td>
<td>1/1/2018</td>
</tr>
<tr>
<td>INV-456789</td>
<td>1/1/2018 - 12/31/2018</td>
<td>Inv456789</td>
<td>Draft</td>
<td>31,000.00</td>
<td>0.00</td>
<td>1/1/2018</td>
</tr>
<tr>
<td>INV-567890</td>
<td>1/1/2018 - 12/31/2018</td>
<td>Inv567890</td>
<td>Draft</td>
<td>31,000.00</td>
<td>0.00</td>
<td>1/1/2018</td>
</tr>
</tbody>
</table>

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.