PCORI Online Cheat Sheet:
Application Submission

Updated as of 12/21/2018

Important Reminders

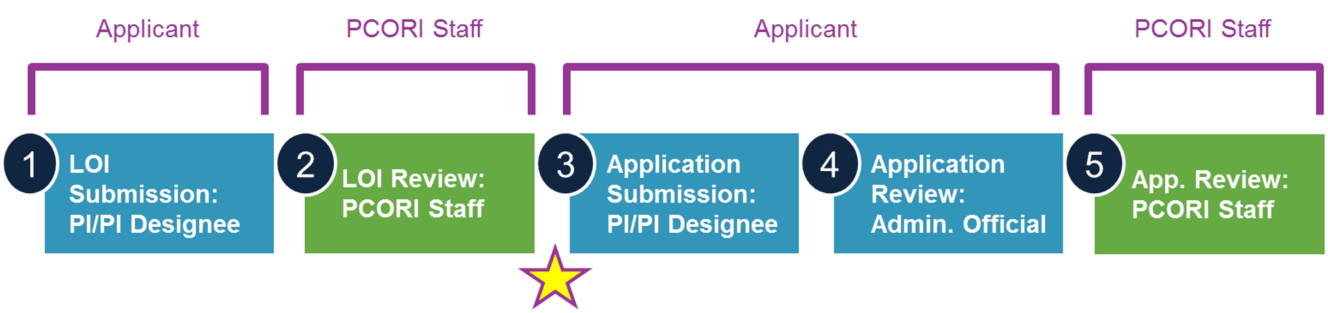
This Cheat Sheet provides guidance on how to:

- Navigate to an Application
- Update and Submit the Application for AO Approval
- Approve the Application and Submit to PCORI

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.

LOI and Application Process: The image below illustrates the LOI and Application Submission and Review process. Applying for funding from PCORI is a two-stage process. A Letter of Intent (LOI) must be submitted before an organization is invited to submit a full Application. Please keep this process in mind while reviewing the steps below.



Navigate to the Application

If your LOI has been approved and you are invited to submit a full Application, PCORI has created a draft Application in [PCORI Online](), pre-populated with the information in the LOI. Navigate to the draft to get started.

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**' to navigate to the Application Dashboard.
4.	On the left-side menu, click '**Applications**.'
5.	Search for the draft Application you would like to edit, and click the **Edit** icon.

Application Submission & Approval

Your application may include the following tabs that have been pre-populated from your LOI submission:

- Contact Information
- Pre Screen Questionnaire
- Resubmission
- PI Information
- Project Information*
- Project Personnel

***Note:** The **Project Information** tab will be pre-populated based on the information previously submitted during the LOI process and should be updated during the Application submission process. Additionally, several new fields appear in this tab, such as Projected Start and End dates, which you will need to complete before submitting your full Application.

For further guidance on these tabs, please reference the LOI Submission Cheat Sheet. Please note that any changes to the following information from the LOI submission will require PCORI's written approval prior to Application submission:

- Principal Investigator
- Institution
- Study design
- Research question(s)
- Specific aims
- Comparator

If you need to change any of this information or have any questions, reach out to pfa@pcori.org.

Update and Submit the Application for AO Approval	
Once you have navigated to the Application, you can enter the requested information in the following tabs. It is highly encouraged that you complete these tabs in the order they appear.	
Pre-Populated LOI Submission Information	
1.	Review the pre-populated tabs from your LOI Submission (listed above).
2.	Any changes to information listed above will require PCORI's written approval prior to Application Submission. ➢ *If you need to change any of this information or have any questions, please reach out to pfa@pcori.org.*
3.	Once you have reviewed and updated the information on the tabs that are pre-populated from your LOI, navigate to the **Project Information** tab, which contains both pre-populated information, as well as new Application questions.
Project Information Tab	
1.	Enter/confirm the **Projected Start Date** and **Projected End Date** of your project. ➢ *The Projected Start and End Date should match the dates listed in the **Budget** pages.*
2.	Enter the **Technical Abstract**, **Public Abstract**, and **Project Narratives**.

3.	Complete the remaining fields through open-ended questions, drop-down menus, and multi-select lists.
4.	Click '**Save & Next**' to advance to the next tab, **Budget**.
Budget Tab The Budget Tab consists of the following eleven pages: • Personnel, Consultant Cost, Supplies, Programmatic Travel, Other Expenses, Equipment, Subcontractor Direct Costs, Subcontractor Indirect Costs, Detailed Budget – Total Prime Indirect, Budget Summary	
1.	Enter **Start Date** and **End Date** (365 days later) for each year of your proposed project. Once complete, click '**Save All Rows**.' ➢ *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 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.*
2.	Click '**Add Row**' to enter budget details related to the first personnel.
3.	Enter all fields: **Name, Key Personnel, Role on Project, Percent Effort (%), Calendar Months, Inst. Base Salary, Salary Requested** and **Fringe Benefits**.
4.	Click '**Save Rows**' when finish editing. ➢ *If a member from your Project Team has already completed the Budget tab, you will be prompted with an error message indicating a Budget has already been saved on your Application.*
5.	To add additional Project personnel, click '**Add Row**' again and repeat steps 4-5.
6.	To copy these personnel details to all project years, select applicable rows and click '**Copy Selected Rows To All Years**'.
7.	To delete, select applicable personnel row and click '**Delete Selected Rows**' to remove. ➢ *If your proposed project is less than 5 years ensure that you delete the copied rows after your proposed project End Date.*
8.	Click '**Save All Rows**' before navigating to the next page.
9.	Click '**Next Page**' to proceed to the next Budget page, Consultant Cost.
10.	Repeat steps 3-10 to update the remaining Budget pages.
11.	Note that **Detailed Budget – Total Prime Indirect** page has a different format. Enter '**Total Prime Indirect Cost**' and '**Applicable Rate**' for each year. ➢ *If your proposed project is less than 5 years, enter '0' for cost and rate for all remaining years.*
12.	Click '**Save**' and '**Next Page**' to navigate to the summary.
13.	For **Budget Summary** Page, review all information for accuracy. ➢ *Some costs are not applicable in the Peer Review Period (or Year 6 for D&I awards) and will be labeled "NA." **Subtotals** and **Totals** are automatically calculated.*
14.	When you are ready to proceed, click the **Templates & Uploads** tab.
Templates & Uploads Tab	
1.	Download the Application templates.
2.	To upload the completed templates, click '**Choose file**' to select a file from your computer, and then click '**Upload**.'

3.	Click '**Save**' and then '**Save & Next**' to navigate to the next tab, **Certification**.
Certification Tab	
1.	Read the statement at the top of the page.
2.	Select '**Yes**' from the drop-down menu below the statement. ➢ *If you select '**No**,' you will not be able to submit the Application.*
3.	Click '**Save**.'
4.	When you have completed the Application and are ready to submit, click '**Review/Submit**.'
5.	You will be taken to the read-only view of the Application.
6.	When you have fully reviewed the Application and are ready to submit to the AO for approval, click '**Submit**.'

Approve the Application and Submit to PCORI

Once the Application is submitted for internal approval, the Administrative Official (AO) can log-in to PCORI Online to review and approve the Application.

1.	Navigate to the **Open Items** on the Application Dashboard, and locate the Application that is 'Submitted to AO.'
2.	Review the read-only version of the submitted Application by clicking on the magnifying glass icon.
3.	Click on the icon under **AO Approve/Withdraw** to Approve, Reject, or Withdraw the submitted Application.
4.	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**' in agreement with the statements above.
5.	Use the second drop-down menu to '**Approve**' or '**Reject**' the submitted Application. ➢ *If you would like to withdraw the Application, use the second drop-down menu to select '**Withdraw**' and enter Withdrawal Reason(s). Please note that you can withdraw the Application at any time.*
6.	When you have completed your review of the Application and entered a decision, click '**Save**.' ➢ *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.*
7.	When you are ready to submit the Application to PCORI, click '**Review/Submit**.'
8.	You will be taken to a read-only view of the AO Decision. When you are ready to submit the Application to PCORI, click '**Submit**.'