

# PCORI Online Engagement Awards Cheat Sheet: Progress Reporting

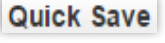

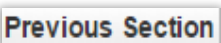

Updated as of 11/2/2018

## Important Reminders

This Cheat Sheet provides guidance on:

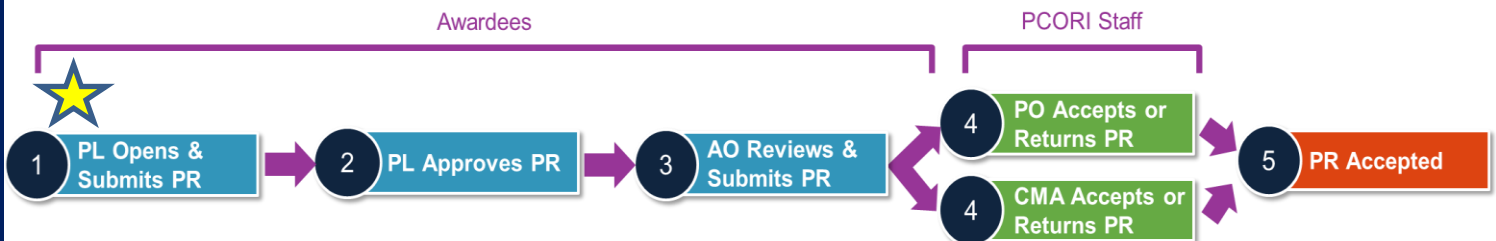
- Updating and Submitting Progress Reports
- Approving Progress Reports
- Resubmitting Returned Progress Reports

Please keep in mind the following icons and definitions:

Icon	Definition	
Quick Save	Use 'Quick Save' to automatically save all information entered into the progress report.	
Next Section	Use 'Next Section' to automatically save the information entered into the progress report, as well as navigate to the next page.	
Previous Section	Use 'Previous Section' to automatically save the information entered into the progress report, as well as navigate to the previous page.	
Cancel	Use 'Cancel' to close the progress report. If selected, any unsaved information will not be retained in the Progress Report.	

## Progress Report Business Process:

The image below illustrates the process of Progress Report (PR) submission and acceptance. The Awardee (typically the Project Lead (PL) or PL Designee) will open and submit the Progress Report through PCORI Online. The PL and the AO will then approve the PR, before it is sent to PCORI for review. Please keep this process in mind while reviewing the steps below.



# Progress Reporting

The following steps detail the typical process for Interim Progress Reporting. From the **Project Details** page, navigate to the list of Progress Reports to open one of the current PRs available. Click **'Edit'** to begin.

## Progress Report Submission

### Page 1

Page 1 of the Interim Progress Report displays Progress Report Details and Project Lead Contact Information.

1. Review 'Progress Report Details' and 'Key Project Personnel.' Please contact [fundede@pcori.org](mailto:fundede@pcori.org) if this information needs to be updated.
2. Click **'Next Section'** to automatically save changes, and proceed to Page 2.

### Page 2

Page 2 requests an update on Deliverables.

1. Review the list of Deliverables in the table.
2. Provide updates to individual Deliverables by entering information directly into the editable fields (i.e., 'Projected Completion Date,' 'Deliverable Status,' 'Completed Date').
3. If any deliverables will *not* be completed, list the reasons why and the implications for your project.
4. Click **'Next Section'** to automatically save changes, and proceed to Page 3.

### Page 3

On Page 3 of the Interim Progress Report, enter information on the project's Accomplishments and Challenges.

1. Respond to the questions under 'Accomplishments and Challenges.'
2. Click **'Next Section'** to automatically save changes, and proceed to Page 4.

### Page 4

On Page 4 of the Interim Progress Report, complete the One Paragraph for Public Use, Financial Status.

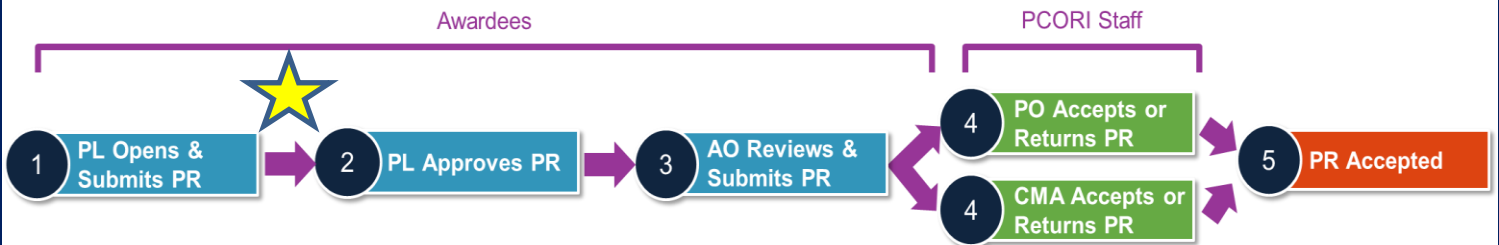
1. Enter information into the 'One Paragraph for Public Use' section.
2. Enter information into the 'Financial Status Update' section.
3. Click **'Next Section'** to automatically save changes, and proceed to Page 5.

### Page 5

On Page 5, update Attachments and Other Publications.

1. Review the instructions regarding which documents should be attached to the Progress Report.
2. If applicable, add additional documents by entering a **File Name**, clicking **'Choose File,'** and **'Upload.'**
3. To add a New Publication, click **'New Publication.'** All new publications are reviewed and approved by the PCORI Librarian.
4. Select the record type (Journal Article, Presentation, or Other), and click **'Continue.'**

5.	Enter key information into the <b>Publication Type</b> section, being sure to enter information into the highlighted fields.
6.	Enter key information on status, title, dates, and authors into the <b>Primary Information</b> section. If the publication is submitted, enter the 'Journal Submission Date.' If the publication has been accepted, enter the 'Accepted/In Press Date.' Lastly, if the publication is published, enter the 'Publication Date.'
7.	Do not edit the <b>Project</b> and <b>Progress Report</b> fields. Click <b>'Save.'</b>
8.	Click <b>'Attach File'</b> to upload the Publication file, and follow the prompts on the following window to attach the file.
9.	Click <b>'Edit'</b> to make any more changes, or click <b>'Back to Report'</b> to return to the Progress Report. You will be taken to a read-only view of the PR, click <b>'Edit'</b> to continue editing the PR. Click <b>'Next Section'</b> to navigate to Page 6.
<b>Page 6</b>	
<i>On Page 6 and the final page of the Progress Report, review the Certification section and submit.</i>	
1.	Review the information under 'Certification.'
2.	<b>When ready to submit Progress Report for review, click 'Submit.'</b> <ul style="list-style-type: none"> <li>➤ <i>The Progress Report will now be read-only. To make further edits, the PI or AO must reject it &amp; follow steps for Progress Report Resubmission below.</i></li> </ul>



## Progress Report Approval

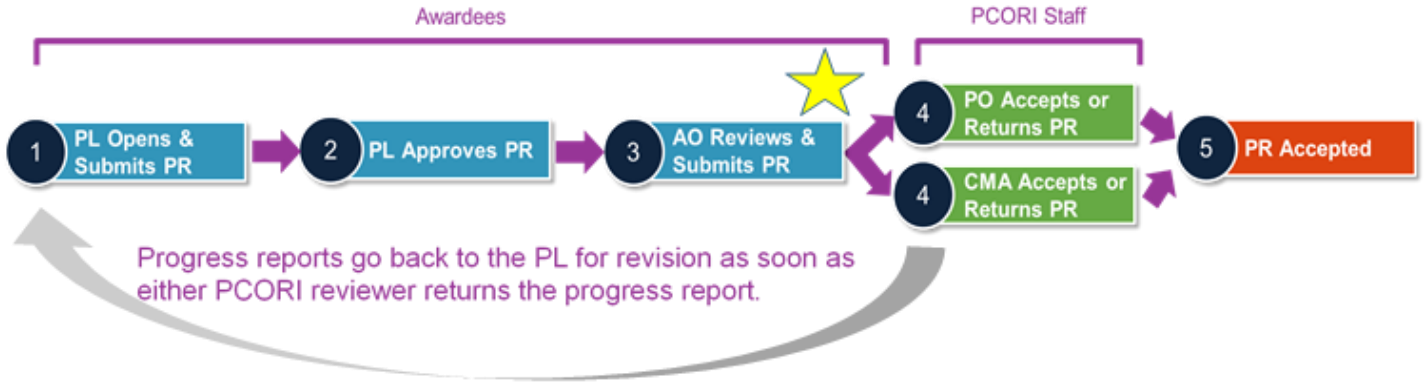
*The following steps describe the internal approval process after the Progress Report is submitted.*  
**Note:** *If the PL submits the Progress Report themselves, they will need to self-approve.*

### Project Lead (PL) Approval:

1.	From the Project Details page, navigate to the Progress Reports list.
2.	Select the Progress Report you plan to review with a status of 'Submitted: Awaiting PI approval,' and navigate to the Approval History section.
3.	Click <b>'Approve/Reject.'</b>
4.	Enter any notes into the 'Comments' section.
5.	Click <b>'Approve'</b> to send the PR to the next approver (Administrative Official) for review. Click <b>'Reject'</b> to return the PR for updates and resubmission. Follow steps for Resubmission below. <ul style="list-style-type: none"> <li>➤ <i>The PL will not be able to start another Progress Report until the previous Progress Report has been approved by the AO.</i></li> </ul>

*Administrative Official (AO) Approval:*

6.	Repeat steps 1-5 above for a Progress Report with a status of 'PI approved: Awaiting AO approval.'
7.	If approved by both the PL and the AO, the progress report will proceed to the PO and the CMA in PCORI.
8.	PCORI will either accept the Progress Report, or return the PR for updates and resubmission.



## Progress Report Resubmission

The PL and AO will receive an email notification when a Progress Report is returned. The following steps provide an overview of how to resubmit a Progress Report if returned by PCORI, PI, or AO.

1.	From the Project Details page, navigate to the Progress Reports list.
2.	Select the progress report with any of the following 'Returned' statuses that has the applicable iteration (i.e. 6 month IPR): <ul style="list-style-type: none"> <li>• 'PI rejected: Returned for revisions'</li> <li>• 'AO rejected: Returned for revisions'</li> <li>• 'PCORI rejected: Returned for revisions'</li> </ul>
3.	Make requested updates to Pages 1-6 of the Progress Report, and resubmit. Refer to the 'Progress Report Submission' section above for more detailed steps (pages 2 & 3).
4.	The PL and AO will review the updates made to the Progress Report, and complete the internal approval process again. Refer to the 'Progress Report Approval' section above for more detailed steps.
5.	PCORI will either accept the Progress Report, or return the PR for further updates and resubmission.
6.	Once PCORI accepts the final Progress Report, no further action is required.

