PCORI Online: Awardee User Guide

Engagement Awards

Updated as of 11/2/2018
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Section 1: Introduction to PCORI Online

Welcome to PCORI Online! This awards management system will provide a “one-stop shop” for all aspects of the award lifecycle, including application submission, project management, progress reporting, and more. It enables applicants and administrators to view and manage project details, and provides a consolidated system for submitting and approving progress reports and other required deliverables. Through this secure platform, PCORI and Awardees will capture real-time understanding of project health, have visibility into deadlines and action items, and benefit from the features of an automated system. In turn, by spending less time on the administrative tasks of managing a project, Awardees will be able to focus more on their research.

This section provides guidance on:
- Getting Started – Tips for Using PCORI Online
- Logging into PCORI Online
- Navigating PCORI Online
1.1 Getting Started – Tips for Using PCORI Online

The following tips and reminders will be useful while using PCORI Online:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>It is important to save your work frequently before navigating away from your current page.</td>
</tr>
<tr>
<td>Required Field</td>
<td>A red vertical line at the beginning of a field indicates a required field that must be completed to save or proceed.</td>
</tr>
<tr>
<td>Magnifying Glass</td>
<td>This symbol indicates that a field has search capabilities, allowing you to select from related search results.</td>
</tr>
</tbody>
</table>

**Note:** If you are idle for more than 2 hours, you will be automatically logged out and need to re-enter your User Name and password to login. Any unsaved work will not be retained.

Lastly, the following browsers are recommended when using PCORI Online:

![Chrome](chrome.png), ![Safari](safari.png), ![Firefox](firefox.png)

**Note:** Confirm that cookies are enabled for any browser used.
1.2 Logging into PCORI Online

1.2.1 Logging in as a New User

2. Click the ‘New User?’ link.

Note: If you have previously logged into PCORI Online, please go to Section 1.2.2 Logging in as a Returning User.
3. On the following page, enter information in the required fields (designated with a red asterisks*), and create a password.
4. Click ‘Join PCORI Portal.’

5. From here, the Contact Information page will appear asking you to submit additional information.
6. After entering in all required information (designated with a red asterisks*), click ‘Submit.’
Note: If you have new project staff, please reach out to PCORI at fundedea@pcori.org.
1.2.2 Logging in as a Returning User

2. Enter your User Name and Password, and click ‘Log in.’
   a. Check your email for a message from PCORI that contains your login information.

Note: Your User Name is the email address you use when interacting with PCORI. If you have previously logged into the PCORI Online, your User Name will remain unchanged. You may need to reset your password by clicking on ‘Forgot your password?’ Navigate to the Appendix for further instructions.
3. Once signed in, you will be directed to the home screen. The home screen allows you to access Advisory Panels, Merit Review, Engagement Awards, Research Awards, the Ambassador Program, D&I Awards, and Infrastructure Awards.
   a. Depending on the size of your screen, you may need to scroll down this page to access all of these areas.
1.3 Navigating PCORI Online

1. From the home screen, click the ‘Engagement Awards’ button. 
2. The subsequent page will display a page with information and features for the Engagement Awards process.
3. Click on ‘My Projects.’
4. On the subsequent page, open the dropdown menu and select ‘My Engagement Awards Projects’ to view a list of all your current projects.

5. Click on the linked Project Title to view your project information on the Project Detail page.

**Note:** Please reach out to help@pcori.org if you have not been granted access to your projects.
a. On the **Project Detail** page, you can view project information, including project staff, contractual information, Progress Reports and more.
b. As you scroll down the page, you will be able to see more sections, including project details. For more information on Project Details, continue to Section 3, Manage Projects.
c. Other sections in the Project Detail page including Application Information, such as Organization and Project Lead, Project Information and Project Status.
Section 2: Respond to Progress Reports

This section offers an in-depth understanding of how to complete Progress Reports through PCORI Online. The system provides a consolidated input form for Awardees to create and track Interim and Final Progress Reports, including recruitment, engagement and deliverable tracking. Interim Progress Reports are required every six months, although programs can also choose to require IPRs more frequently. Final Progress Reports are to be completed at the end of a fully executed contract, budget, and deliverable schedule. Users will summarize project methods, key project findings, and interpretations of the relevance of findings to patients/stakeholders, clinicians, and/or health care systems. Additionally, Progress Reports are the Awardees’ opportunity to discuss project accomplishments, challenges, impact or outcomes, as well as the plan to disseminate the results from the project. The image below illustrates the process of Progress Report (PR) submission and acceptance.

This section provides guidance on:
- Updating and Submitting Progress Reports
- Approving Progress Reports
- Resubmitting Returned Progress Reports
2.1 Updating and Submitting Progress Reports

From the Project Details page, navigate to the Progress Reports related list and review the current list of Progress Reports available. For a reminder of how to navigate Project Details, see Section 1.3: Navigating PCORI Online.
When you have a Progress Report with an open start date, the Project Lead (PL) or PL Designee can navigate to the Progress Report record from the project page, and review the information. Once you select a Progress Report, you can update it by selecting ‘Edit.’

![Progress Report Table]

**Note:** You will not be able to edit a current Progress Report if a prior report has not been edited and approved.
Once you are in ‘Edit’ mode, you can begin updating your Progress Report. There are 6 pages of the Engagement Awards Progress Report:

<table>
<thead>
<tr>
<th>Page</th>
<th>EA Interim Progress Report Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Progress Report Detail, Project Lead Contact Information</td>
</tr>
<tr>
<td>2</td>
<td>Deliverables Update</td>
</tr>
<tr>
<td>3</td>
<td>Accomplishments and Challenges</td>
</tr>
<tr>
<td>4</td>
<td>One Paragraph for Public Use, Financial Status Update</td>
</tr>
<tr>
<td>5</td>
<td>Attachments and Publications Guidelines</td>
</tr>
<tr>
<td>6</td>
<td>Certification</td>
</tr>
</tbody>
</table>

At the top of each section, there are buttons that help with navigation and are key to using the Progress Report system:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Save</td>
<td>Use ‘Quick Save’ to automatically save all information entered into the progress report.</td>
</tr>
<tr>
<td>Next Section</td>
<td>Use ‘Next Section’ to automatically save the information entered into the progress report, as well as navigate to the next page.</td>
</tr>
<tr>
<td>Previous Section</td>
<td>Use ‘Previous Section’ to automatically save the information entered into the progress report, as well as navigate to the previous page.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Use ‘Cancel’ to close the progress report. If selected, any unsaved information will not be retained in the Progress Report.</td>
</tr>
</tbody>
</table>
The following instructions will describe how to complete the Interim Progress Report (IPR). On each page of the IPR, there are required fields that must be completed in order for you to move on to the next page.

1. **Page 1**: Progress Report Detail, Key Contact Information, Study Findings & Impact, Key Patients & Stakeholders
   a. Review the first section for key contacts on the project.
      i. If any information in these sections is incorrect or missing, please reach out to fundedea@pcori.org.

b. Click ‘Next Section’ to navigate to Page 2: Deliverables Update.
2. **Page 2: Deliverables Update**
   
a. Submit information on your project’s active deliverables and provide status updates on each, as well as a reason for why any deliverables will not be met on time, if applicable.

   ![Image of Deliverables Update Table]

   b. Click ‘**Next Section**’ to navigate to Page 3: Accomplishments and Challenges.
3. **Page 3:** Accomplishments and Challenges
   a. Provide information on accomplishments and challenges of the Progress Report for PCORI to evaluate your Project’s current progress.

   b. Click ‘**Next Section**’ to navigate to Page 4: One Paragraph for Public Use, Financial Status Update.
4. **Page 4**: One Paragraph for Public Use, Financial Status Update
   a. Enter information into the sections labeled *One Paragraph for Public Use*, and *Financial Status Update*

   ![EUGENE WASHINGTON PCORI ENGAGEMENT AWARDS INTERIM PROGRESS REPORT](image)

   **Note:** If you have any updates to *Key Project Personnel* efforts, please contact your PCORI Program Officer.

   b. Click ‘**Next Section**’ to navigate to Page 5: Attachments and Other Publications.
5. **Page 5**: Attachments and Other Publications

   a. Review the descriptions under **Attachments and Other Publications**.
   
   b. If applicable, add any additional documents by scrolling down to the **Notes & Attachments** section. Click ‘Attach File’ to select a file from your computer and then follow the steps to attach the file to your Progress Report.

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**Note**: Once added, attachments will appear in the **Notes & Attachments** section at the bottom of the page.
c. To add a new publication, scroll down and click ‘New Publication.’
   i. Select which type of document you plan to upload from the dropdown, and then click ‘Continue.’
   ii. Enter key information on the publication type, being sure to enter information into the highlighted fields.

**Note:** Follow steps in Section 3.2.2 to review the current list of publications prior to submitting a new publication.
iii. Enter key information on status, title, dates, and authors. 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.’

iv. Do not edit the **Project** and **Progress Report** fields.

v. Once completed, select ‘Save.’ All new publications are reviewed and approved by the PCORI Librarian.
d. Click ‘Attach File’ to upload the Publication file.
i. Choose a file to upload. Click ‘Attach File’ to save the file and then ‘Done’ when complete.
ii. To make further edits to the record, click ‘Edit.’

iii. Return to the Progress Report by clicking ‘Back to Report.’ You will be taken to a read-only view of the Progress Report.

iv. Click ‘Next Section’ to navigate to Page 6: Certification and Submission.
6. **Page 6: Certification and Submission**
The final section of the progress report will prompt you, as the Project Lead or PL Designee, to submit the progress report for institutional approval and certify that all information is accurate.
   
a. If you are ready to submit the Progress Report for internal approval, click the ‘Submit’ button.
b. If not ready to submit the Progress Report, select ‘Quick Save,’ and all information entered to this point will be retained.

![Image of Progress Report Submission Interface](image-url)
2.2 Approving Progress Reports

Once submitted, the Progress Report will no longer be able to be edited. On the Progress Report page, there will be a section at the bottom titled Approval History. This section will be used to monitor the status of each stage of the submission process for the Progress Report.

Note: The PL will not be able to begin working on another Progress Report until the previous Progress Report has been approved by the AO.
Key sections to note in Approval History include: Action, Status, Actual Approver, Comments and Overall Status.

- **Action** includes both the current step of the approval cycle, and the links to Reassign, Approve or Reject the Progress Report. For instructions on how to reassign a Progress Report, please navigate to Section A.1 in the Appendix.

- **Status** includes the current status of the most recent step in the Progress Report (e.g. Pending, Submitted).

- **Actual Approver** indicates who is responsible for the online submission and approval of the Progress Report for the current step.

- **Comments** includes any notes placed in the system by the most recent submitter or approver.

- **Overall Status** shows the current status for the Progress Report. The three options include Pending, Approved, and Rejected.
2.2.1 Project Lead (PL) Approval

1. To approve or reject the Progress Report, navigate to the list, and select ‘Approve/Reject’ to begin the process.
2. Click ‘Approve’ to approve the progress report, or ‘Reject’ to request additional updates to the progress report.
   a. The PL may also enter a comment related to the approval or rejection decision of the progress report, as necessary. To reassign, please refer to the Appendix.
2.2.2 Administrative Official (AO) Approval

Once approved by the Project Lead, the Progress Report is now ready for the Administrative Official to review the submitted Progress Report. Please note that the AO cannot be the same as the PL.

1. As the AO, click ‘Approve/Reject’ to approve or request additional updates to the Progress Report.
   a. Enter a comment related to the approval or rejection of the progress report, as necessary.
2.2.3 PCORI Program Officer and Contract Administrator Acceptance

Once approved by the Administrative Official, the Progress Report is now sent for final review and acceptance by the PCORI Program Officer and Contract Administrator.

1. Navigate to the Project Detail page and review the Progress Reports list. From this list, you can view the status of the recent progress report.
2. Click the Progress Report Number to navigate to the record for more detail on the status of the progress report from the Program Officer and the Contract Administrator. Scroll to the bottom of the page to view Approval History.
If both the PCORI Program Officer and Contract Administrator accept the progress report, the system will display a message showing the progress report as ‘Accepted by PCORI’ in both the project page and inside the progress report itself. The system will display an individual status for both the PO and Contract Administrator, and will also display an overall status (highlighted in green in the image below). The PL and AO will also receive an email that the PR has been accepted. For information on when a Progress Report is returned, navigate to Section 2.3, Resubmitting Returned Progress Reports.
2.3 Resubmitting Returned Progress Reports

If PCORI returns the progress report, asking for additional updates, the system will display a message showing the progress report as ‘PCORI rejected: Returned for revisions’ in both the project page and inside the progress report. The PL will be notified via email that the PR has been returned.
1. The Project Lead will need to begin the resubmission process for submitting the progress report.
   a. The PL will edit the Progress Report, as requested by PCORI staff. Once the requested change has been made, repeat the steps in Section 2.1: Updating and Submitting Progress Reports.

   **Note:** When a progress report is returned, the system will create a duplicate record with the status of ‘PCORI rejected: Returned for revisions.’
Section 3: Manage Projects

With PCORI Online, users will have the opportunity to review and manage project and deliverable data for ongoing monitoring and reporting. Once a contract is awarded, Awardees will be provided access to view and/or edit relevant project information. Through PCORI Online, both PCORI and Awardees can upload, review and share documentation and deliverables associated with various projects, contracts, and applications.

This section provides guidance on:
- Reviewing Project Details
- Navigating your Projects
  - Managing Deliverables
  - Submitting New Publications
  - Updating Submitted Publications
  - Submitting Notes & Attachments
3.1 Reviewing Project Details

From the Project Detail page, you will view current project personnel, including PCORI and Awardee staff.

1. Navigate to the Project Detail page (see Section 1.3 for navigation tips).
2. Review the contacts under PCORI Staff and Key Project Personnel.
   a. If any information in these sections is incorrect or missing, please reach out to fundedea@pcori.org.
3.2 Navigating Project Details

When viewing Project Details, navigate to the top of the page to use ‘hover links’ to view related information to the project (e.g. Milestones-Deliverables, Progress Reports, Recruitment, Notes & Attachments). Anytime you hover over one of these links, a window pops up showing a short list of items that can be selected.

1. There are two options for viewing these sections:
   - You can place your cursor over a ‘hover link’ and view a list of items from the object.
   - Alternatively, you can click on the ‘hover link’ and you will be brought down to the bottom of the page where the lists reside.
2. If you click into one of the items (as shown below), you will be taken to a second page where you can review the item details. If you wish to view the full list of items, click ‘**Go to list.**’
3. Once navigated to the full list, click ‘Next Page’ to see the next array of items in the list.
4. You can also sort the list by clicking the column headers. An arrow will indicate if the column is being used to sort the list.

5. The list can be further filtered by clicking a letter in the row above the list to show only those records that begin with that letter (see example in the image below).
3.2.1 Managing Deliverables

Deliverables are shown in a list at the bottom of the Project Detail page. Inside each deliverable record, information can be quickly updated.

1. Click into a Milestone-Deliverable record on the Project Detail page.
2. After clicking ‘Edit,’ certain fields will become editable to capture deliverable updates (i.e., Milestone-Deliverable Status, Projected Completion Date, Completed Date, Reason for Delay).
3. Click ‘Save.’
There will be times that PCORI will request information from Awardees. PCORI Online has a feature that makes this easily done through **Tasks**. Tasks can be used to reply to requests for information from PCORI regarding deliverables.

1. Click into a Milestone-Deliverable record on the **Project Detail** page.
2. View the **Tasks** in your Milestone-Deliverable record to see any that have been assigned to you. As new tasks are assigned by PCORI, you will receive an email notification.

**Note:** Tasks that have been assigned to other project members will *not* be viewable in your Tasks.

3. Click ‘**Edit**’ to respond to the task.
a. Ensure that you have completed all required fields.

4. Click ‘Save.’

**Note:** An email notification will be sent out to the Project Lead (PL), Administrative Official (AO), and any Designees on the project 15 days before the deliverable is due.
At times, you may be asked to add an attachment, such as a deliverable, to a Milestone-Deliverable. This can be done by using ‘Attach File’ feature in Notes & Attachments on the Milestone-Deliverable record page

1. Click ‘Choose File.’
2. Select the document(s) from your computer to upload. At this time the file name will appear to the right of the ‘Choose File’ button,
3. Click ‘Attach File.’
4. Select ‘Done,’ and all chosen documents will be appear in the Notes and Attachments list.

Note: All documents uploaded in this section will be viewable to anyone with access to the Project or Deliverable, including your Project Team and PCORI staff.
3.2.2 Submitting New Publications

In order to create a new Publication record, users can enter the information through a Progress Report or through the Project record. To create a new publication record through a Progress Report, please see instructions in Section 2: Respond to Progress Report.

1. Navigate to the Project Details page.
2. Navigate to the list of Publications and click ‘New Publication’ to add a new publication. Review the current list of publications prior to submitting a new publication to avoid duplicate entries. All new publications are reviewed and approved by the PCORI Librarian.
3. Select the type of publication.
4. Click ‘Continue.’
5. Enter key information on the publication type, being sure to enter information into the highlighted fields.
6. Enter key information on status, title, dates, and authors into the Primary Information section.
   a. If the publication is submitted, enter the Journal Submission Date.
   b. If the publication has been accepted, enter the Accepted/In Press Date.
   c. If the publication is published, enter the Publication Date.
7. Do not edit the Project and Progress Report fields.
8. Click ‘Save.’
9. To upload the related Publication file, click ‘Attach File’ on the newly created Publication record.
10. Choose a file to upload. Click ‘Attach File’ to save the file and then ‘Done’ when complete.
3.2.3 Updating Submitted Publications

When viewing your projects, you can update exiting Publications at any point through the Project page.

1. Navigate to the Project Detail page.
2. Navigate to the list of Publications and open an item to view more detail about the publication.
3. If necessary click 'Edit' to update the information.

**Note**: Published Journal Articles cannot be edited after being approved by the PCORI Librarian.
3.2.4 Submitting Notes & Attachments: New Note

In PCORI Online, there are ways to collaborate with your internal team, or with PCORI staff. The section Notes & Attachments in PCORI Online allows users to send communications via notes or to attach documents to the project.

1. To submit a note to a project, navigate to the Notes & Attachments list in the Project Detail page.
2. Select ‘New Note.’
3. Provide a title and enter the desired message in the **Body** field.

4. Click ‘Save.’

**Note:** The ‘Private’ checkbox will make the note only visible to you.
3.2.5 Submitting Notes & Attachments: Attach File

1. To submit an attachment to a project, navigate to the Notes & Attachments list in the Project Detail page.
2. Click 'Attach File' in the Notes & Attachments list.
   a. Click 'Choose File.'
   b. Select the document(s) from your computer to upload. At this time the file name will appear to the right of the 'Choose File' button,
   c. Click 'Attach File.'
   d. Select 'Done,' and all chosen documents will be appear in the Notes and Attachments list.

Note: All documents uploaded in this section will be viewable to anyone with access to the Project or Milestone-Deliverable, including your Project Team and PCORI staff.
Appendix

In the Appendix of this document, you will find supplementary information and guidance that may be useful while using PCORI Online.

This section provides guidance on:
- Reassigning a Progress Report
- Retrieving a Lost Password
- Configuring your Settings
- Email Notifications
A.1 Reassigning a Progress Report

Under ‘Reassign,’ the user can choose to reassign the current step in the Progress Report submission process to another individual. Once Reassign Approval Request is clicked, this new individual will be responsible for approving the current component of the Progress Report.
A.2 Retrieving a Lost Password

2. If you do not know or have forgotten your PCORI Online password, click ‘Forgot your password?’ to retrieve it.
3. In the following screen, enter your User Name (likely the email address you use with PCORI), and click ‘Reset Password.’
4. After submission, you will receive a system-generated email with instructions on how to reset your password.
A.3 Configuring your Settings

On the home screen, there is a page called My Profile, where you can update your account information, including your personal information, email address, and security settings.

1. Click the ‘My Profile’ tab.

2. Review the page for information such as your name, phone number and mailing address.
3. If the information needs to be updated click ‘Edit.’ The system will display a screen that will allow you to update your personal information. Once updated, click ‘Save.’
4. To update your email address, click the ‘Email Address Change Request’ button. An email request will pop up that will allow you to send an email to PCORI requesting that a new email address is entered in the system on your behalf.

Note: If you update your email address, the new email address will become your user name.
5. To edit information about your current employer, click the button named ‘Edit Employer Details.’
   a. In the new window, search for your current employer.
      i. If found, enter your position, your department, and click ‘Save’ to keep the information.
      ii. If unable to find your employer, select ‘Employer not found’ and a new window will pop up that allows you to enter information which PCORI staff will use to add your employer.
      iii. If you are currently unemployed, you can select ‘Unemployed’ and the system will allow you to save without the need to enter any employer information.
6. To edit your personal settings, click ‘**My Settings**’ at the top right of any page. The menu that pops up provides settings that you can alter relative to your user experience.
7. Under **Location Settings**, you can change your location information such as your time zone.
   a. Ensure that your language, locale and time zone are all correct.
   b. Click 'Save.'

![Location Settings](image)

The **Security Settings** page allows you to reset your password or request a new user name.
1. Enter your current password, and your new password.
2. Click 'Save.'

![Security Settings](image)