PCORI Online Cheat Sheet:
Letter of Intent (LOI) Submission

Updated as of 6/6/2018

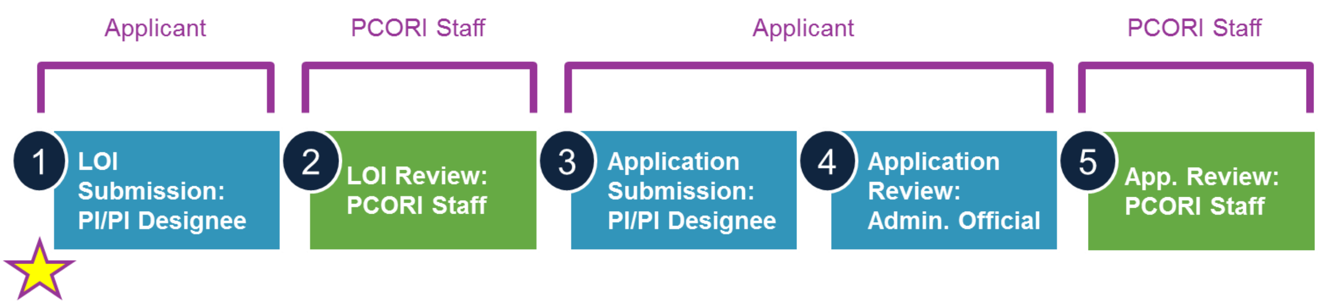
Important Reminders

This Cheat Sheet provides guidance on how to:
- Navigate to and Select a New Funding Opportunity
- Navigate to a Draft Letter of Intent (LOI)
- Complete and Submit a Letter of Intent (LOI)

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 and Select a New Funding Opportunity

A Letter of Intent (LOI) must be submitted before an organization is invited to submit a full Application.	
Search for Funding Opportunities through PCORI Online:	
1.	Log-in to PCORI Online.

2.	Click the button for the area of funding you are applying for (i.e., Research Awards, Dissemination & Implementation Awards).
3.	Click '**Funding Opportunities**.'
4.	Browse through the available Funding Opportunities, or enter keyword(s) and click '**Search**' to search for a Funding Opportunity.
5.	Click the title of the opportunity to which you will apply.
6.	Click '**Apply**.'
Search for Funding Opportunities through PCORI.org:	
1.	Navigate to www.pcori.org.
2.	Click '**Funding Opportunities**.'
3.	Under **Open** opportunities, scroll down and click the title the opportunity to which you will apply.
4.	Click '**Apply Now**.'
5.	On the next page, you will be prompted to log-in to PCORI Online. Enter your Username and Password, and click '**Log in**.'
6.	Once logged in to PCORI Online, confirm the opportunity to which you will apply, and click '**Apply**.'

Navigate to a Draft Letter of Intent (LOI)

If you have started an LOI for a PCORI funding opportunity, you can navigate to the draft through PCORI Online.

1.	Log-in to PCORI Online.
2.	Click the button for the area of funding you are applying for (i.e., Research Awards, Dissemination & Implementation Awards).
3.	Click '**My LOIs and Applications**.'
4.	On the left-side menu, click '**LOIs**.'
5.	Under **Open Items**, locate the draft LOI you would like to continue editing, and click the **Edit** icon.

Letter of Intent (LOI)

Once you have navigated to the LOI form, you can enter the requested information in the following tabs. It is highly encouraged that you complete these tabs in the order they appear.

Complete and Submit a Letter of Intent (LOI)

Contact Information Tab

1.	Use the magnifying glass to search and select the names of your **Principal Investigator** (PI) and **Administrative Official**. ➢ *Team members that do not appear will need to create a PCORI Online account.*
2.	Use the magnifying glass to search and select the names of your **PI Designee 1**, **PI Designee 2**, and **Financial Officer**, if applicable.
3.	Use the magnifying glass to search and select the name of your **Organization**.
4.	Enter additional information regarding your organization, including **Congressional District** and **Department** information.
5.	Click '**Save & Next**' to advance to the next tab, **Pre Screen Questionnaire**.
Pre Screen Questionnaire Tab	
1.	Use the drop-down menus to select '**Yes**' or '**No**' for the various questions regarding specific aims of your research. If you answer '**Yes**' to any of these questions, your LOI will not progress past the review stage.
2.	Click '**Save & Next**' to advance to the next tab, **Resubmission**.
Resubmission Tab	
1.	Use the drop-down menus to select '**Yes**' or '**No**' for the initial resubmission question.
2.	If you select '**Yes**' to the first question, complete the remaining questions on the page. If you require additional assistance locating a previous application title and/or ID number, please contact pfa&@pcori.org.
3.	Click '**Save & Next**' to advance to the next tab, **PI Information**.
PI Information Tab	
1.	Enter the **PI Work Telephone** number.
2.	Use the drop-down menu to select the **group with which the PI primarily identifies** (i.e. Industry, Research, etc.).
3.	Use the multi-select list to enter the **methods through which you have interacted** with PCORI in the past. Use the arrow buttons (>, <) to move items between the Available list and the Chosen list.
4.	Complete the remaining fields regarding the PI's experience. If you select '**Other**,' please describe in the boxes provided.
5.	Click '**Save & Next**' to advance to the next tab, **Project Information**.
Project Information Tab	
1.	Enter your **Project Title**.
2.	Use the drop-down menu to enter whether the focus of your project is on a **rare disease**.
3.	Enter direct and indirect **costs**, the total **amount requested**, and the **estimated project length**.
4.	Indicate the **disease(s) or condition(s)** that will be the primary and secondary focus of the proposal.
5.	Enter information on the **populations** and any **racial/ethnic minorities** that your project will target.

6.	Indicate the **healthcare topic(s)** that will be the primary and secondary focus of the proposal.
7.	Complete the remaining fields regarding your project, such as **targeted sample size**.
8.	Click '**Save & Next**' to advance to the next tab, **Project Personnel**.
Project Personnel Tab	
1.	On the Project Personnel page, click **'New'** to add a new personnel record. Be sure to add the AO, PI, and Designee(s), as well as any other stakeholders associated with the project.
2.	Enter the personnel's full **name**, and use the drop-down menus to enter information regarding their position/role.
3.	Enter the personnel's degrees, phone number, and email address.
4.	To designate the individual as **Key Personnel**, select '**Yes**' or '**No**.' Key Personnel typically includes the PI and sometimes PI Designees.
5.	Click **'Save'** to save the new personnel record, and you will return to the **Project Personnel** tab.
6.	To ''**Edit**' or '**View**' existing records, navigate to the **Action** column and click the applicable button.
7.	To add additional Project Personnel, click '**New**' again and repeat steps 2-5.
8.	Click '**Save & Next**' to advance to the next tab, **Templates & Uploads**.
Templates & Uploads Tab	
1.	Download the LOI template. If you have been invited to resubmit, you do not need to complete the additional template. Instead, upload the Letter of Invitation by following step 2.
2.	To upload the completed template, click '**Choose file**' to select a file from your computer, and then click '**Upload**.' ➢ *All documents must be uploaded as a PDF file.*
3.	When you've uploaded all documents, click '**Save**.'
4.	When you have completed the LOI and are ready to submit, click '**Review/Submit**.' You will be taken to the read-only view of the LOI.
5.	When you have fully reviewed the LOI and are ready to submit, click '**Submit**.'