

# PCORI Online Administrative Official Cheat Sheet: Logging in, Approving Progress Reports, & Project Management






Updated as of 10/31/17

## Important Reminders

This Cheat Sheet provides guidance on:

- Logging in to PCORI Online:
  - Logging in as a New User
  - Logging in as a Returning User
- Progress Reporting:
  - Approving Progress Reports
- Project Management:
  - Submitting Notes & Attachments

Please keep in mind the following icons, user roles, and definitions:

User Role	Definition	
<b>Save</b>	It is important to always save your work. Make a habit of using the <b>save</b> button before navigating away from your current page.	
<b>Required Field</b>	A red vertical line at the beginning of a field indicates a <b>required field</b> that must be completed to save or proceed.	
<b>Magnifying Glass</b>	The magnifying glass indicates that a field has <b>search capabilities</b> , allowing you to select from related search results.	

User Role	Definition
<b>Principal Investigator (PI)/ Project Lead (PL)</b>	Institution's primary Point of Contact (POC) throughout the of the contract award; responsible for the <b>programmatic conduct</b> of the research or engagement award project
<b>PI/PL Designee</b>	An individual selected by the Principal Investigator (PI) or Project Lead (PL) to act as a <b>backup or alternate</b>
<b>Administrative Official (AO)</b>	Responsible for the proper <b>administration of the contract</b> , including overseeing the submission of the contract activation, contract renewals, and other required materials

# Logging into PCORI Online

The following steps provide guidance on logging in to PCORI Online.  
Your User Name is the email address you use when interacting with PCORI.

## Logging in as a New User

1.	To log-in to PCORI Online as a <i>new user</i> , click ' <b>New User?</b> '
2.	Enter information in the required fields (designated with a red asterisks*), and create a password.
3.	Click ' <b>Join PCORI Portal.</b> '
4.	On the next page, input additional contact and employer information and click ' <b>Submit.</b> '
5.	You will receive an email with further instructions.
6.	From the automated email, click the link that will direct you to log-in to the PCORI Online home page.
7.	Once you log-in to PCORI Online, click the button for the area of funding you are applying for (i.e., Research Awards, Engagement Awards).
8.	Click on ' <b>My Projects</b> ' to view a list of your active projects. Click on a project title to navigate to the Project Details page.
9.	<b>If you do not have access to your project(s), email the PCORI Help Desk at <a href="mailto:help@pcori.org">help@pcori.org</a> with a request to be added to your project(s).</b>

## Logging in as a Returning User

1.	To log-in to PCORI Online as a <i>returning user</i> , enter your User Name and Password and click ' <b>Log in.</b> '
2.	If you have previously logged into the PCORI portal, your User Name will remain unchanged. ➤ <i>Your username will be the email address used with interacting with PCORI Staff.</i>
3.	If you are prompted to reset your password, click ' <b>Forgot your password?</b> '
4.	On the following screen, enter your User Name (i.e. your email address), and click ' <b>Reset Password.</b> '
5.	You will receive a system-generated email with instructions on how to reset your password
6.	From the automated email, click the link that will direct you to log-in to the PCORI Online home page.
7.	Once you log-in to PCORI Online, click the button for the area of funding you are applying for (i.e., Research Awards, Engagement Awards).
8.	Click on ' <b>My Projects</b> ' to view a list of your active projects. Click on a project title to navigate to the Project Details page.
9.	<b>If you do not have access to your project(s), email the PCORI Help Desk at <a href="mailto:help@pcori.org">help@pcori.org</a> with a request to be added to your project(s).</b>

# Progress Reporting

## Progress Report Business Process:

The image below illustrates the process of Progress Report (PR) submission and acceptance. The Awardee (typically the PI/PL or PI/PL Designee) will open and submit the Progress Report through PCORI Online. The PI/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.



The following steps detail the internal AO approval process after the Progress Report has been submitted and then approved by the PI or PL as seen in Step 3 in the above process flow. The AO will automatically receive an email when a Progress Report is ready for their approval.

## Progress Report Approval

### Navigate via Email:

1.	Click on the link in the email to navigate to the read-only view of the Progress Report.
2.	Navigate to the <b>Approval History</b> section. To approve, proceed with steps 3-5 below.

### Navigate via PCORI Online:

1.	From the Project Details page, navigate to the <b>Progress Reports</b> list.
2.	Select the Progress Report you plan to review, and navigate to the <b>Approval History</b> section.
3.	Click ' <b>Approve/Reject.</b> '
4.	Enter any notes into the <b>Comments</b> section.
5.	<p>Click '<b>Approve</b>' to submit to PCORI for review and acceptance.</p> <ul style="list-style-type: none"> <li>➤ <i>PCORI staff will either accept the Progress Report, or return the PR for updates and resubmission.</i></li> </ul> <p>Click '<b>Reject</b>' to return the PR to the project team for updates and resubmission.</p> <ul style="list-style-type: none"> <li>➤ <i>Rejecting the Progress Report updates the initial PR submission record to a status of 'Returned,' where the project team can make updates and resubmit for review &amp; approval. A duplicate, read-only record will be created with a status of 'Rejected.'</i></li> </ul>

The PI/PL and AO will receive an email notification if PCORI returns the Progress Report. After requested updates are complete and the PI/PL approves the resubmitted Progress Report, the AO will review the changes and reapprove.

# Project Management

Through PCORI Online, both PCORI staff and Awardees can upload, review and share documentation and deliverables associated with various applications and projects.

## Submitting Notes & Attachments

The **Notes & Attachments** section allows users to send communications via notes or to attach documents. These actions (as detailed below) can be taken on the overall Project Details page, or directly in a Milestone record.

### Upload Attachment

1.	From the Project Details page, navigate to <b>Notes &amp; Attachments</b> and click ' <b>Attach File.</b> '
2.	Click ' <b>Choose File</b> ' to select a document from your computer.
3.	Click ' <b>Attach File.</b> '
4.	Click ' <b>Done</b> ' to save. ➤ Please note that all documents uploaded in this section will be viewable to anyone with access to the Project or Milestone, including Awardees and PCORI staff.

### Add New Note

1.	From the Project Details page, navigate to <b>Notes &amp; Attachments</b> and click ' <b>New Note.</b> '
2.	Click ' <b>New Note</b> ' to add text or communication to the Project page.
3.	Add a title and body to the Note, and click ' <b>Save.</b> '