

PCORI Online: Post-Award Training

Frequently Asked Questions (FAQ)



Updated as of 7/25/2018

Getting Started

PCORI Online provides a “one-stop shop” for all aspects of the award lifecycle, including Progress Reporting and general Project Management.

This section of the FAQ provides guidance on:

- User Roles in PCORI Online
- Logging In & Access to PCORI Online

Please keep in mind the following user roles and definitions:

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

*All definitions are available in our glossary: <http://www.pcori.org/funding-opportunities/how-apply/glossary>

Question	Response
How do I log-in?	<p>If you are a current PCORI Awardee, your account has likely already been added to the system and you will need to reset your password:</p> <ul style="list-style-type: none"> • Navigate to https://pcori.force.com/engagement • Click 'Forgot your password?' • Enter your User Name (your User Name is typically the email address you use when interacting with PCORI) • Click 'Reset Password' • Check your email for instructions on how to update your password • Log-in to the new PCORI Online with your User Name and updated password! <p><i>Note: If you are a Designee, you may need to register as a 'New User.'</i></p>
I have a new member of my Awardee Project team. How can they get access?	<p>If you have new project staff, please reach out to pfa@pcori.org. They can register as a 'New User' to get started:</p> <ul style="list-style-type: none"> • Navigate to https://pcori.force.com/engagement • Click 'New User' • Complete the New User Form • Check your email for instructions on how to log-in • Log-in to the new PCORI Online with your new User Name and password!
The system doesn't recognize my User Name. What should I do?	<p>If you have any trouble logging in, please reach out to help@pcori.org. As a reminder, your User Name is typically the email address you use when interacting with PCORI.</p>

Who should have access to the portal and projects?	AOs, PIs/PLs, and Designees should have access to the portal. If your Designee(s) do <i>not</i> have access to the Portal, they may need to register as a 'New User.'
Who should I contact if I do not see my awarded Project listed when I navigate to the My Projects page?	Please reach out to your PI and have them send an email to pfa@pcori.org in order to request access for you to view/edit your project in PCORI Online.
How can we find out who our AO is at our institution? How does the AO get added to the system?	The AO is named in the Application for the Institution/Organization. PCORI will automatically add the AO to the system based on this information in the Application. Additionally, you can find the AO listed on the Project Details page in PCORI Online.
Can there be more than one AO?	No; there can only be one AO.
Does the AO need to be a different person than the PI or PL?	Yes; the AO needs to be different than the PI or PL.
Can there be more than one PI/PL Designee?	Yes; there can be up to two Designees assigned.
Can the PI/PL and the Designee have the same log-in information?	No; each will need his/her own account.

Progress Reporting

Through Progress Reports in PCORI Online, awardees will summarize project methods, key project findings, and interpretations of the relevance of findings to patients/stakeholders, clinicians, and/or health care systems. Progress Reports are your opportunity to discuss project accomplishments, challenges, impact or outcomes, as well as the plan to disseminate the results from the project.

This section of the FAQ provides guidance on the following regarding Progress Reports:

- Transition to PCORI Online
- Access to Edit & Submit Progress Reports
- Milestones/Deliverables, Recruitment, & Engagement
- Progress Report Submission & Approval

Question	Response
<i>Transition to PCORI Online:</i>	
When will we need to switch to the new system to submit Progress Reports?	After January 2, 2017, all Progress Reports (PRs) are required to be submitted via the new PCORI Online. Please reach out to your Program Officer for specific direction as your PR is nearing the due date.
If I've completed an Interim Progress Report this year, will it be uploaded in this system?	Yes; all past Progress Reports have been attached to the projects.
Will information from previous Progress Reports (e.g. Milestones, Publications) already be entered in the new system?	All previously submitted information regarding Milestones and Publications should be pre-populated. If you notice any discrepancies, please email pfa@pcori.org .

Access to Edit & Submit Progress Reports:

When can I start updating an upcoming Progress Report?

You are able to start updating a progress immediately after your previous PR is completed. We recommend updating about 30 days prior to the PR due date to allow for PI/PL and AO approval.

How can we see in advance the entire content of an IPR to anticipate all the questions that must be answered?

You can find the IPR template here:
<http://www.pcori.org/funding-opportunities/awardee-resources>.

As the PI/PL Designee, am I able to log-in to Progress Reports? Can the PI/PL log-in as themselves and make changes?

Yes; both the PI/PL and Designee have access to update and submit the Progress Report. Please note that whether the PI/PL or Designee submits the PR, the PI/PL must approve the Progress Report.

How do I save my changes to the Progress Report?

We encourage you to save as frequently as possible. Use the **'Quick Save'** button to save your work at any time. Additionally, clicking the **'Next Section'** or **'Previous Section'** buttons will save your work and navigate you to another page in the Progress Report. Always click the **'Quick Save'** button before exiting the PR. You can save any updates to the Progress Report and return later to submit for approval.

Can only one person edit the Progress Report at a time?

Yes; only one person should edit the PR at a given time. Otherwise, there is a risk that the information may not be retained if not saved properly. However, multiple members of the awardee team can update the PR prior to submission to PCORI.

Can the PI/PL and AO see the draft PR while it is being updated?

Yes; the PI/PL and AO should have access to view the draft PR while it is in-process. However, they cannot approve until the PR has been submitted by the PI/PL or Designee.

Milestones/Deliverables, Recruitment, & Engagement:

If I need to make updates to Milestones/Deliverables marked as complete, what do I do?

Once marked as complete, milestones/deliverables cannot be edited after saving. If you need to make any changes or updates, please reach out to pfa@pcori.org or your Program Officer.

How should I provide an update to recruitment on my project?

As of June 9th, the recruitment page of the Research Awards Progress Report will be updated. On this page, you will provide an update on the Cumulative Race/Ethnicity of study participants. Awardees are now requested to submit monthly recruitment and enrollment updates directly to their Program Officer (PO) and Program Associate (PA).

I filled out the Engagement Report page on the Progress Report, clicked 'Save,' and closed out the PR. When I returned to finish the PR and navigated to the Engagement Report page, I can't see my previously submitted responses. Do I have to fill out this page again?

If you have no further changes, you don't have to fill out the Engagement Report page again. Although you won't be able to view your responses on the Engagement Report page, you can confirm your answers to these questions on the read-only page of the PR. If you do have edits, you can update your answers on the Engagement Report page.

Progress Report Submission & Approval:

Does the PR need to be *submitted* or *accepted* by the deadline?

Please *submit* the Progress Report by the indicated deadline. The PR should also be *approved* by the PI/PL and AO in advance of the deadline.

When the PI logs in to approve a Progress Report, does s/he have the ability to edit it as well?	Once the Progress Report has been submitted, it is no longer editable. The AO or PI/PL must reject the Progress Report in order to make any updates, and then the Designee must resubmit the PR for approval.
Since Engagement Awards do not require an institutional official's signature, will the EA Progress Report require AO approval?	Yes; the Engagement Awards Progress Reports will also require AO approval.
Does the AO need to approve the PR by the due date?	Yes; we recommend leaving time for the AO to approve prior to the PR due date. If your AO does not yet have an account with PCORI Online, please encourage them to register as a 'New User' as soon as possible so they can promptly review and approve the PR after the PI has submitted.
How do I update the AO after a Progress Report has been submitted?	Please contact your Program Officer pfa@pcori.org to provide them with the new AO on your project. Once the AO has been updated, PCORI staff will return the submitted Progress Report so that you can resubmit it for PI/PL & AO approval.
Who receives the email indicating whether PCORI accepts or returns a Progress Report?	If a Progress Report is returned for updates, the PI/PL and Designee will receive an email notification. The email indicating PCORI acceptance of the Progress Report will go to the AO, as well as the PI/PL and the Designee.
If PCORI returns our Progress Report, how long do we have to edit and resubmit it?	If a Progress Report has been returned for updates, the PI/PL and Designee will receive an email notification that indicates the new due date. Please note that the PI/PL and AO will need to reapprove the Progress Report to resubmit to PCORI.
How long does it take the PCORI team to approve a progress report?	Reach out to your Program Officer for questions regarding timeline. It usually depends on the specific Project/Progress Report. Remember that your Program Officer will not receive the PR until it has been approved by your PI and AO.

Project Management

In addition to providing updates through Progress Reports, awardees have access to view and/or edit relevant project information from the Project Details page in PCORI Online.

This section of the FAQ provides guidance on how to manage the following from the Project Details page:

- Key Project Personnel
- Milestones/Deliverables
- Publications
- Notes & Attachments
- Recruitment
- COI & Expertise Forms

Question	Response
Key Project Personnel:	
Who are 'Key Personnel?'	Key Personnel include individuals who contribute to the scientific development or execution of the project in a substantive and measurable way. The contribution is independent of financial compensation.
For new projects, will the Project Personnel be pre-populated?	Yes; the Project Personnel will be pre-populated for a new project.

<p>How can we report Key Personnel who depart the project?</p>	<p>If you have Key Personnel who have departed your project, please reach out to your Program Officer or send an email to pfa@pcori.org.</p>
<p><i>Milestones/Deliverables:</i></p>	
<p>Are we expected to update milestones/deliverables as they are due, or through the Interim Progress Reports?</p>	<p>You can continue to update milestones/deliverables through Interim Progress Reports. If you would like to update milestones/deliverables at any time, you have the flexibility to do so through the Project Details page.</p>
<p>Our project recently had a Contract Modification. Do I need to update the Milestone/Deliverable schedule?</p>	<p>Once your contract modification/amendment has been approved, PCORI will update your milestone/deliverable schedule accordingly. Please reach out to pfa@pcori.org or your Program Officer with any questions.</p>
<p>If I make updates through the Project Details page (i.e. changing the status of a milestone/deliverable), will those updates be reflected in the subsequent Progress Report?</p>	<p>Yes; the various pages and records of the new PCORI Online are integrated. If you make updates to records (i.e. milestones/deliverables) through the Project Details page, those updates will also appear in your Progress Reports.</p>
<p>Does the AO have to provide approval for all milestones/deliverables (i.e. attachments), or just for the Interim and Final Progress Reports?</p>	<p>The AO will only need to provide approval in the system for Progress Reports. However, please defer to your Awardee Project Team's processes for uploading and finalizing deliverables (i.e. uploading files).</p>
<p><i>Publications:</i></p>	
<p>Are presentations (invited talks, poster presentations) included as part of Publications?</p>	<p>Yes; publications can include, but are not limited to, presentations, publications, scientific manuscripts, blogs, newsletters & reports.</p>
<p>Do you want only accepted publications?</p>	<p>Please upload all Publications, including those that are in preparation or have been submitted for publication. You should update the existing publication in PCORI Online as the status of the publication changes.</p>
<p>When should we add/update publications within PCORI Online?</p>	<p>You can add new publications or update existing publications related to your project on the Project Details page, under the Publications section by clicking 'New Publication.' Research Infrastructure CDRN and PPRN Awardees can submit publications through the Publications Update page of an Interim Progress Report (IPR).</p>
<p><i>Notes & Attachments:</i></p>	
<p>Can attachment uploads be in any file format (Word, Excel, etc.) or do they need to be PDF?</p>	<p>Yes; they can be in any file format.</p>
<p><i>Recruitment:</i></p>	
<p>I need to submit monthly reports to our PO. Can I do this through this new site?</p>	<p>Yes; you will be able to upload these reports through the Notes & Attachments section on the Project Details page. Please reach out to your PO with specific instructions on where to upload these reports.</p>
<p><i>Conflict of Interest (COI) Forms (Only Applicable to Research Awards):</i></p>	
<p>Who from our project team should fill out the COI form?</p>	<p>The PI from your project will populate the COI & Expertise form on behalf of the project. Next, the AO will approve the submitted form.</p>

How often should the COI form be filled out and approved?	The COI form should be filled out by the PI and approved by the AO between the 11 th month and the 12 th month of each year of your project. For example, if your project begins on January 1 st , a COI form should be filled out between December 1 st and December 31 st for each year of your awarded project.
What do we do if the Key Personnel listed on the COI form are incorrect?	If the Key Personnel on your form are not correctly listed, please reach out to your Contract Administrator at PCORI. Please note that all changes to Key Personnel require PCORI approval.
Can the PI edit the COI form after submitting to the AO for approval?	Once the PI submits the COI form for AO approval, the PI will no longer be able to edit the information provided on the COI form. If edits are necessary after submission, please reach out to your AO so that they can return the form for further edits.
Can the AO edit the COI form after the PI submits, but prior to approval?	Yes; the AO can edit the COI form after the PI has submitted the form for their approval, as long as they have not yet approved.

Additional Help & Resources

Question	Response
Who can I contact for assistance with my projects?	For project assistance, please reach out to your Program Officer or pfa@pcori.org .
Who can I contact for technical assistance?	For technical or system assistance, please reach out to help@pcori.org .