

PCORI Online Cheat Sheet: Administrative Official: Logging in & Application Submission




Updated as of 9/11/2018

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
- Application Submission
 - Approving an Application

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

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

User Role	Definition
Principal Investigator (PI)/ 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 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.

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 ' New User? '
2.	Enter information in the required fields (designated with a red asterisks*), and create a password.
3.	Click ' Join PCORI Portal. '
4.	Submit additional information and click ' Submit. '
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 ' My Projects ' to view a list of your active projects. Click on a project title to navigate to the Project Details page.
9.	If you do not have access to your project(s), email the PCORI Help Desk at help@pcori.org with a request to be added to your project(s).

Logging in as a Returning User

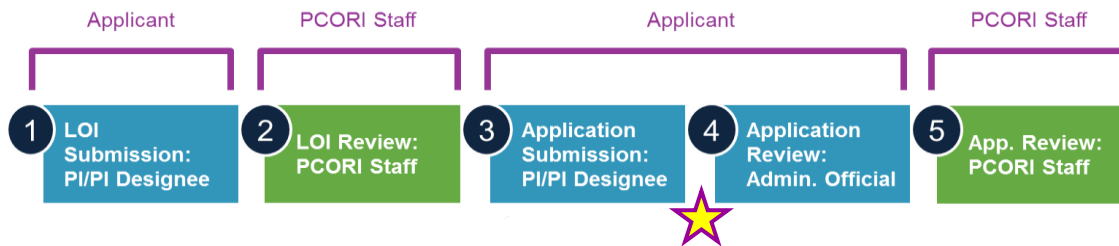
1.	To log-in to PCORI Online as a <i>returning user</i> , enter your User Name and Password and click ' Log in. '
2.	If you have previously logged into the PCORI portal, your User Name will remain unchanged. ➤ <i>Your username will be the email address used with interacting with PCORI Staff.</i>
3.	If you are prompted to reset your password, click ' Forgot your password? '
4.	On the following screen, enter your User Name (i.e. your email address), and click ' Reset Password. '
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 ' My Projects ' to view a list of your active projects. Click on a project title to navigate to the Project Details page.
9.	If you do not have access to your project(s), email the PCORI Help Desk at help@pcori.org with a request to be added to your project(s).

Application Submission

LOI and Application 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. If the Letter of Intent (LOI) has been reviewed and the organization is invited to continue in the application process, the next step will be to complete the full Application. The applicant will update the information as necessary and submit to the AO for approval. Once the AO has approved the Application, it will be submitted to PCORI.

The image below illustrates the LOI and Application submission and review process. Please keep this process in mind while reviewing the steps below.



The following steps detail the internal AO approval process after the Application has been submitted.

Approve the Application and Submit to PCORI

Once an Application is submitted by the PI/PL for internal approval, the Administrative Official (AO) can log-in to [PCORI Online](#) to review and approve the Application.

1.	Navigate to the Open Items on the Application Dashboard, and locate the Application that is Submitted to AO .
2.	Review the read-only version of the submitted Application by clicking on the magnifying glass button.
3.	Once you have completed your review, click on the icon under AO Approve/Withdraw to Approve, Reject, or Withdraw the submitted Application. <ul style="list-style-type: none"> ➤ If updates to the Application are necessary, the AO should reject the Application at which point it will be editable again. The PI will make updates and resubmit for AO approval.
4.	Read the statements in the bulleted list at the top of the AO Approve/Withdraw page.
5.	Select ' Yes ' or ' No ' from the drop-down menu under 'I Agree.'
6.	Use the drop-down menu to Approve or Reject the Application. <ul style="list-style-type: none"> ➤ If you would like to withdraw the Application, use the second drop-down menu to select 'Withdraw' and enter Withdrawal Reason(s). Please note that you can withdraw the Application at any time.
7.	After entering your decision, click ' Save .'
8.	When you are ready to submit the Application to PCORI, click ' Review/Submit .'
9.	You will be taken to a read-only view of the AO Decision. When you are ready to submit the Application to PCORI, click ' Submit .' <ul style="list-style-type: none"> ➤ The Application has now been submitted to PCORI. You will receive an email notification of this.

You can confirm the Application submission on the **Application Dashboard** by navigating to the **Closed Items** tab, where the status has been updated to '**Under Review**.'