PCORI Online Research Awards Cheat Sheet: Logging in & Project Management

Updated as of 3/21/2018

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
- Project Management:
  - Managing Milestones & Tasks
  - Submitting and Updating Publications
  - Submitting and Updating IRB Approval Records
  - Submitting Notes & Attachments
  - Completing & Approving COI Forms

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)	Institution's primary Point of Contact (POC) throughout the lifecycle of the contract award; responsible for the **programmatic conduct** of the research awards project
PI Designee	An individual selected by the Principal Investigator (PI) 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
Contracts Administrator (CMA)	PCORI **Contracts POC** for the funded project(s)
Program Officer (PO)	Primary **scientific manager** for Research Awards projects
Program Associate (PA)	PCORI staff member responsible for **Program Officer support** on projects
Engagement Officer (EO)	Focused specifically on the **engagement** of patients and other healthcare stakeholders in each research awards project

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.	Navigate to PCORI Online (https://pcori.force.com/engagement).
2.	To log-in to PCORI Online as a *new user*, click '**New User?**'
3.	Enter information in the required fields (designated with a red asterisks*), and create a password.
4.	Click '**Join PCORI Portal**.'
5.	Submit additional information, and click '**Submit**.'
6.	You will receive an email with further instructions.
7.	From the automated email, click the link that will direct you to log-in to the PCORI Online home page.
8.	Once you log-in to PCORI Online, click the '**Research Awards**' button.
9.	Click on '**My Projects**' to view a list of your current projects. Click on a project title to navigate to the Project Details page. ➢ *Please reach out to help@pcori.org if you have not been granted access to your project(s).*

Logging in as a Returning User

1.	Navigate to PCORI Online (https://pcori.force.com/engagement).
2.	To log-in to PCORI Online as a *returning user*, enter your User Name and Password and click '**Log in**.' ➢ *You may need to reset your password by clicking on 'Forgot your password?'*
3.	Once you log-in to PCORI Online, click the '**Research Awards**' button.
4.	Click on '**My Projects**' to view a list of your current projects. Click on a project title to navigate to the Project Details page. ➢ *Please reach out to help@pcori.org if you have not been granted access to your project(s).*

Project Management

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

Managing Milestones

*To view Milestones outside of the Progress Report, navigate to the bottom of the Project Detail page to the **Milestones-Deliverables** section.*

1.	From the Project Details page, navigate to **Milestones-Deliverables**.
2.	Open a Milestone by clicking on the link in the **Milestone-Deliverable Number** column.
3.	Click '**Edit**' to update the Milestone.
4.	Enter information in editable fields, including Milestone Status, Due Date, Projected Completion Date, Completed Date, and any Reason for Delay. Click '**Save**.'
Completing Milestone Tasks:	
5.	In the Milestone record, navigate to the **Tasks** section at the bottom of the page to view Milestone Tasks that have been assigned to you. ➢ *You will be notified via email when a Milestone Task is assigned to you.*
6.	Click on the **Task Name** to view details, and click '**Edit**.'
7.	Update the Task Status, add External Comments, and click '**Save**.'

Submitting and Reviewing Publications

Awardees can submit Publications through the Publications section of the Project Details page. From the Project Details page, Awardees can add new Publications and edit existing records.

Submitting New Publications

1.	From the Project Details page, navigate to **Publications**.
2.	Click '**New Publication**.' All new publications are reviewed by the PCORI Librarian. ➢ *Review the current list of publications prior to submitting a new publication to avoid duplicate entries.*
3.	Select the record type (Journal Article, Presentation, or Other), and click '**Continue**.'
4.	Enter key information into the **Publication Type** section, being sure to enter information into the highlighted fields.
5.	Enter key information on status, title, dates, and authors into the **Primary Information** section. • If the publication is *submitted*, enter the **Journal Submission Date** • If the publication has been *accepted*, enter the **Accepted/In Press Date** • If the publication is *published*, enter the **Publication Date**
6.	Do not edit the **Project** and **Progress Report** fields.

7.	Click '**Save**.'
8.	To upload the related Publication file, click '**Attach File**' on the newly created Publication record.
9.	Follow the prompts on the following window to attach the file.
Updating Submitted Publications	
1.	From the Project Details page, navigate to **Publications**.
2.	Open the applicable Publication record you wish to update.
3.	Review the information on the Publications Details page, and click '**Edit**' to update. ➢ *Published Journal Articles cannot be edited after being approved by the PCORI Librarian.*
4.	Click '**Save**' once updates are complete.

Submitting and Updating IRB Approval Records

Awardees can create new Institutional Review Board (IRB) Approval records directly from their Project Details page.

Creating a New IRB Approval Record

1.	From the Project Details page, use the hover link or scroll down to navigate to the **IRB** section.
2.	Click '**New IRB**.'
3.	Fill out the requested information.
4.	Click '**Save**.'

Uploading an IRB Approval Attachment

1.	After creating a new IRB Approval record and clicking '**Save**,' you will be taken to a read-only page of the IRB record. Scroll down to the **Notes & Attachments** section.
2.	Click '**Attach File**.'
3.	Follow the steps on the following page to upload the IRB Approval documentation.
4.	After clicking '**Done**,' you will be directed back to the read-only view of the IRB Approval record. Confirm that the IRB documentation uploaded in step 3 is successfully uploaded.

Updating Existing IRB Approval Records

1.	From the Project Details page, use the hover link or scroll down to navigate to the **IRB** section.
2.	Click on the title of the existing IRB you want to update, and then click '**Edit**.'
3.	Update the IRB information, as necessary.
4.	Click '**Save**.'

Submitting Notes & Attachments

*The **Notes & Attachments** section allows users to send information to PCORI via notes or attached documents. These actions can be taken on the overall Project Details page, or directly on a Milestone or Publications record.*

Uploading Attachment

1.	From the Project Details page, navigate to **Notes & Attachments**.
2.	Click '**Attach File**.'
3.	Click '**Choose File**' to select a document from your computer, and click '**Attach File**.'
4.	Click '**Done**' to save. Please note that all documents uploaded will be viewable to anyone with access to the Project or Milestone, including others on your Project Team and PCORI staff.

Adding New Note

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

Completing & Approving COI Forms

Each year of the project, the PI will complete a Conflict of Interest (COI) form on behalf of the project and submit it to the AO for approval. Next, the AO will review and approve the COI form.

Completing the COI Form (PI)

1.	From the Project Details page, navigate to **COI & Expertise**.
2.	Click '**New COI & Expertise**.'
3.	Review the information regarding the Awardee Institution, Project Name, PI, and other Key Personnel that are populated on the form.
4.	If the information is correct, select the checkbox next to the **Above Key Personnel Names f are validated** field. ➢ *If the information in this section is incorrect, please reach out to help@pcori.org. Please note that all changes to Key Personnel require PCORI approval.*
5.	The page will expand with questions to answer regarding Conflicts of Interest. For the first question, select '**Yes**' or '**No**' using the drop-down menu. ➢ *If you select '**No**,' you will be prompted to answer an additional question.*
6.	Continue to answer the remaining questions using the boxes provided.
7.	Click '**Save**' once complete.

Submitting COI Form for AO Approval (PI)	
1.	From the Project Details page, navigate to **COI & Expertise**.
2.	Click the applicable **COI & Expertise Number** to navigate to the form.
3.	Scroll down to the **Approval History** section and click ‘**Submit for Approval**.’
4.	In the pop-up box, click ‘**OK**.’ ➢ *After submitting the COI form for AO approval, the PI will no longer be able to edit the form.* ➢ *An email notification will be sent to the AO indicating that a COI form has been submitted for their review & approval.*

Approving COI Form (AO)	
1.	From the Project Details page, navigate to **COI & Expertise**.
2.	Click the applicable **COI & Expertise Number** to navigate to the form.
3.	Scroll down to the **Approval History** section and click ‘**Approve/Reject**.’
4.	On the next screen, enter any comments as necessary. Next, click ‘**Approve**.’ ➢ *Once the AO approves the COI form, the PI will receive an email notifying them of approval.* ➢ *Alternatively, click ‘**Reject**’ to return the COI form to the PI for further updates.*