ONLINE APPLICATION SYSTEM USER MANUAL: SUBMIT AN APPLICATION FOR RESEARCH-RELATED CONFERENCE SUPPORT
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Introduction

Applicants who would like to apply for Research-Related Conference Support for Planning of Individual Participant-Level Data Meta-Analysis (RRCS IPD-MA) should follow the instructions below. If you experience technical difficulties while using the Patient-Centered Outcomes Research Institute (PCORI) RRCS Online Application System, please email us at pfa@pcori.org.

Please note the following before you begin:

• **Remember to save your work before closing the browser window or your work will be lost.** To save your work, select the “Save” button at the bottom or top of the application form. You will be prompted to enter required information. Enter dummy information if you are not ready to complete required fields. Incomplete fields will be highlighted in red. The system will note incomplete fields one at a time.

• **The system will time out after two hours of inactivity.** Remember to save your work frequently or you will be logged out and lose any unsaved work.
Step 1: Log In

- Select the “Select the ‘Research-Related Conference Support for the Planning of Individual Participant-Level Data Meta-Analysis (RRCS-IPD MA)” link from the Funding Opportunities section on www.pcori.org.

- Select the “APPLY NOW” button.
You will be directed to the PCORI Online login page.

Log In for Previous Users

- **Select the link in the email you received.** It will direct you to the login portal for the PCORI RRCS Online Application System.
• Log in using your previously created user name and password.
• Select “Forgot your password?” to retrieve a lost password. Your user name is required.

Log In for New Users
• Select the link in the email you received. It will direct you to the login portal for the PCORI RRCS Online Application System.
• Select “New User?” You will then be directed to create an account. **All fields are required.**
• Enter all of the required information into the second screen after selecting the “Join PCORI Portal” button.
• Remember to note your user name (the email you entered) and password.
• Select the “Submit” button when you are done.
• You will receive an email confirmation.
• Select the link to the login page.
• Enter the user name and password you created to log in and begin your application.
Email Link Activation

- Select the link in the email you received, which will look similar to the following:
Once you are logged in, you can view the Home page. Select the “Click Here to Get Started” button in the PCORI Research and D&I Awards informational box.
• Scroll down and select the “Research Related Conference Support Proposal” button to go to a page where you can fill in information before submitting a proposal.

• You will be directed to the following page. **All fields on this page are required.**
• After filling out all of the fields, select the “Submit” button. You will be directed to check your email for further instructions.

• After this step, navigate back to the Home page.
Step 2: Prepare Your RRCS Application

Once you are on the Home page, scroll to the Access Saved Full Proposal section.

- Then select the “Research Related Conference Support Dashboard” button.
• You will be taken to your dashboard, where you will see your applications that are in process.
• Select “Edit” to begin your application.
Details

- When you select “Edit,” you will be taken to the Project Detail page. On this page, all of the fields marked with an asterisk (*) are required.
- Select the “Save” button at the bottom or top of the page to save your work as you go. Saving your work will prompt you to enter required information. Enter placeholder text or information if you are not ready to complete the other required fields.
- In the Organization & Project Lead Information section, fill out all of the necessary and required fields that are marked with an asterisk (*).
- In the Project Summary section, fill out all of the necessary and required fields that are marked with an asterisk (*).
- In the Collaboration & Partnerships section, fill out the required field.
For larger text boxes, **character limits** (including spaces) are noted in instructions.
• RRCS IPD-MA applicants should prepare their applications in the template provided (adhering to indicated word limits), and then copy and paste text into the appropriate fields.

Authorizations
• Certify that your organization authorizes you to submit the application to PCORI.
• Select the “Save” button at the bottom or the top of the page to save your work and proceed to the next step. Saving your work will prompt you to enter required information. Enter placeholder text or information if you are not ready to complete required fields.
• Incomplete fields will be highlighted in red. The system will note incomplete fields one at a time.
Project Personnel

- Select the “New Project Personnel” button to enter new project personnel.

- On the page below, you will be able to edit the Project Personnel information.

- **Required fields** are marked with an asterisk (*).

- Fill out all of the details and select the “Save” button when done.
- After saving each entry, you must select the “Back to Application” button to go back to the application.
• Limit your entries to the five most critical project personnel, excluding the project lead.
• There should be at least one project personnel attached to the application. If you do not associate at least one project personnel to the application and try to submit it, you will see an error message like the one below.

When you have finished entering all necessary project personnel, select the “Attach File” button to add an attachment in the Notes & Attachments section.
Attachments

- Select the “Attach File” button and follow the prompts to upload required templates.

- Select the “Choose File” button. Then, select a file stored on your computer. Select the “Attach File” button to attach the selected file to your application. Select the “Done” button to complete the process.
- You will see a message that your attachments have been added to the application.
Save and Return to Your Application: Navigating the Dashboard

You can save your application and return to it at any time to continue your work.

- To save your work, select the “Save” button at the bottom or the top of the RRCS IPD-MA Application page. **Please be sure to do this before closing the browser window or you will lose your work.**
- You will be prompted to enter required information.
- Once you have successfully saved your work, you may also leave the system and come back later.
- You can view the application on your dashboard, where you can view all applications that are in process.
- Select “Edit” to be taken back to your incomplete application.

After saving your work, you will be taken to a summary screen. **Select the “Submit for Approval” button to submit your application** to your Administrative Official (AO) for approval.
Step 3: Review and Submit Your Application

Once you’ve completed all sections on each tab, you are ready to review and submit your application. **Note that once you submit the application, you will no longer be able to make changes.**

- Once you have completed your review and all fields are complete, select the “Submit for Approval” button to submit your application to your AO.

- Once you have submitted your application for approval, it is locked and you (the applicant) cannot edit it.
• Once you have submitted your application for approval, the Principal Investigator (PI) or co-PI and AO get an email similar to the one below.

Resources and Contact Information

• Required templates are available in the Application Resources in the RRCS IPD-MA funding announcement
• Questions? Email us at pfa@pcori.org.