Translation Center Revised Summary Review Cheat Sheet
For Principal Investigators (PIs)

Updated as of 4/24/2018

Important Reminders

The PCOR Translation Center, working under PCORI's Dissemination and Implementation Program, prepares revised summaries for your research project. The Translation Center's role is to help PCORI revise the summaries now posted on the PCORI website to assure that all funded research projects are available and easy to understand for a variety of audiences. To do this, the PCOR Translation Center has created a standard question-and-answer format for all summaries.
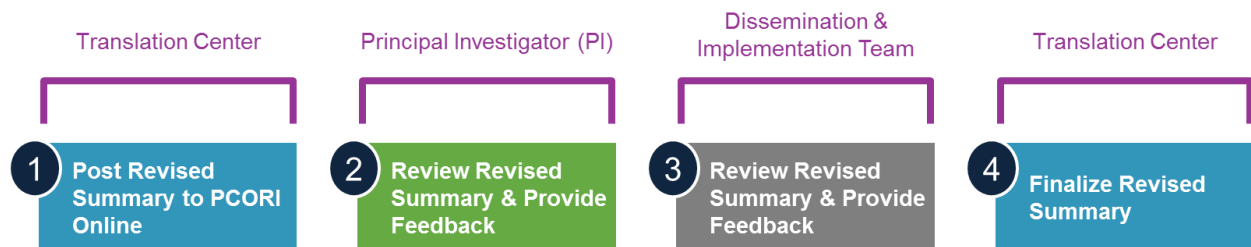
After the Translation Center has prepared a revised summary, as the Principal Investigator (PI), you will receive an email notifying you to review the content of the summary prior to it being finalized and posted to the PCORI website. You will be able to access the revised summary for your review from the Publications section of your Project Details page in PCORI Online.

Once you complete your review of the project summary, the PCORI Dissemination & Implementation team will also review the revised summary for language, style, and consistency. At this point, the Translation Center will compile the feedback provided and then finalize the revised summary prior to being posted to the PCORI Website.

This Cheat Sheet provides guidance on:
- Logging in and navigating PCORI Online
- Accessing the revised summary uploaded for your project
- Submitting your review of the revised summaries

The image below illustrates the revised summary review process:

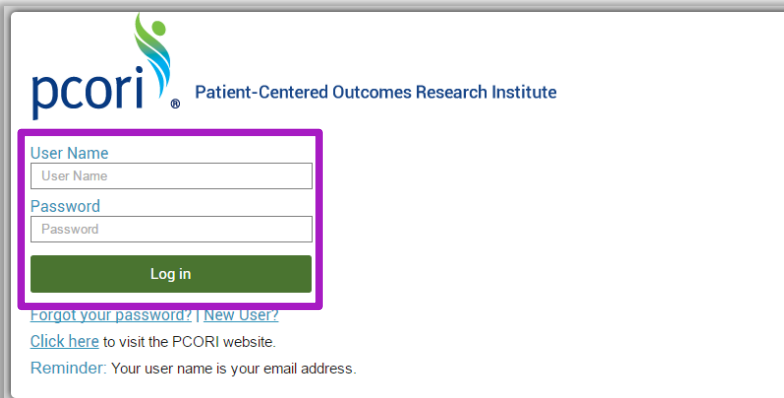| Translation Center	Principal Investigator (PI)	Dissemination & Implementation Team	Translation Center
1 Post Revised Summary to PCORI Online	2 Review Revised Summary & Provide Feedback	3 Review Revised Summary & Provide Feedback	4 Finalize Revised Summary

Accessing the Revised Summary

First, log in to PCORI Online and navigate to your Project Details page. From there, you will navigate to the revised summary record to download the document that the Translation Center has uploaded for your review.

Navigating to the Revised Summary

Navigating to the revised summary record via email

1.	Open the **Revised Summary Review notification email**. The email subject will be *Review of your PCORI project's Summary due by XX/XX/XXX*.
2.	Click the link to access the summary on your project page.
3.	Log in to PCORI Online, if you are not already signed in.
4.	Once you log in, you may need to re-click the link in the email (step 2).

OR Navigating to the revised summary record via PCORI Online

1.	Navigate to PCORI Online (https://pcori.force.com/engagement).
2.	Enter your User Name and Password and click '**Log In**.' ➤ *Your username will be the email address used when interacting with PCORI Staff.*
3.	If you need to reset your password, click '**Forgot your password?**' and follow the steps on the next screen.
4.	Once you log in, you will be navigated to the PCORI Online home page.
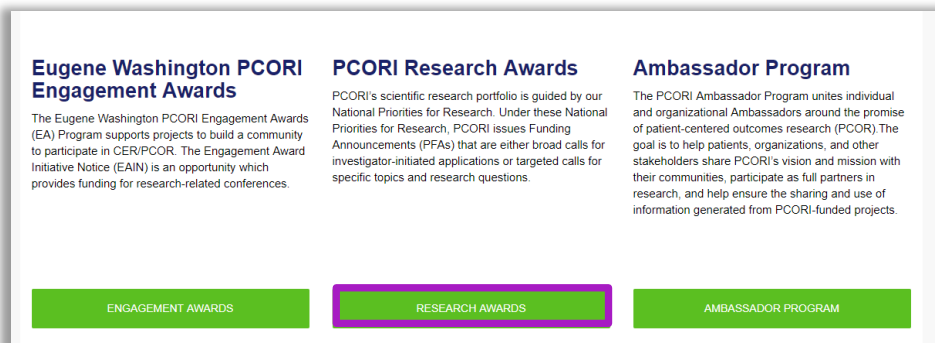
5.	From the PCORI Online home page, click the '**Research Awards**' button to navigate to the Research Awards home page.
6.	Click '**My Projects**' to view a list of your current project(s). ➤ *If you do not see your project in this list, please email the PCORI Help Desk at tc@pcori.org to gain access.*
7.	Click the **Short Project Title** to navigate to the Project Details page.

8.	From your Project Details page, navigate to the **Publications** section by using the hover link at the top of the page. ➤ *Alternatively, you can scroll down the page to the **Publications** section.*
9.	Open the Publication with a **Record Type** of "TC Revised Summary" by clicking on the **Publication Number**.

Reviewing the revised summary details

1.	On the Publications Detail page, first take note of the **PI Review Due Date** in the **Publication Type** section. ➤ *Your review of the revised summary should be submitted by this date.*
2.	Scroll down to the **Notes & Attachments** section. Click the **Title** of the attachment and then click '**View file**' on the next screen to download the revised summary.

	Completing the revised summary review offline
1.	Once you have downloaded the file, open it in Microsoft Word. First, save a new version of this file and update the file name by adding "_PI Review" to the end of the existing file name.
2.	Review the revised summary offline, using Track Changes in Microsoft Word to provide edits and comments in the document. Ensure you save all changes to the file. ➤ *It is helpful to provide an explanation for changes you suggest. If you have no changes, please add a comment indicating "No changes" and save.*

Submitting the Revised Summary Review

Once you have completed your offline review of the revised summary document, you will navigate back to the record in PCORI Online and upload the document with your changes and comments.

Uploading the Revised Summary Review

	Navigating to the revised summary record via email
1.	Open the **Revised Summary Review notification email**. The email subject will be *Review of your PCORI project's Summary due by XX/XX/XXX*.
2.	Click the link to access the summary on your project page.
3.	Log in to PCORI Online, if you are not already signed in.
4.	Once you log in, you may need to re-click the link in the email (step 2).
	OR **Navigating to the revised summary record via PCORI Online**
1.	Navigate back to PCORI Online (https://pcori.force.com/engagement) and log in.
2.	Click the '**Research Awards**' button to navigate to the Research Awards home page.
3.	Next, click '**My Projects**' to view a list of your projects. From the list, click the **Short Project Title** for the project that you are uploading a review of the revised summary.
4.	On the Project Details page, use the **Publications** hover link to navigate to the revised summary record that you accessed previously.
5.	Click the **Publication Number** for the Publication with a **Record Type** of "TC Revised Summary."
	Uploading your revised summary review
1.	Scroll down to the **Notes & Attachments** section.
2.	Click '**Attach File**' to upload the document with your reviewed revised summary.

Attach File to Publication PUB-00001641

1. **Select the File**
   Type the path of the file or click the Browse button to find the file.
   [Choose File] No file chosen

2. **Click the "Attach File" button.**
   Repeat steps 1 and 2 to attach multiple files.
   (When the upload is complete the file information will appear below.)
   [Attach File]

3. **Click the Done button to return to the previous page.**
   (This will cancel an in-progress upload.)
   [Done]

3.	On the next screen, click '**Choose File**' to select a file from your computer and click '**Attach File**.'
4.	Click '**Done**' to save.

Marking the Review as Complete

Editing the revised summary record

Publication
PUB-00001642   Printable View

✔ Attachment(s) added.

« Back to Project: Brewster County Asthma Comparative Effectiveness Research

Notes & Attachments [2] | Publication History [2]

Publication Detail   [Save] [Cancel]

Publication Type
PI Reviews Revised Summary ✔ ↺   Project   Brewster County Asthma Comparative Effectiveness Research
                                                 PI Review Due Date   3/27/2018

System Information
Created By   Patricia Ayers, 3/20/2018 2:52 PM   Last Modified By   Patricia Ayers, 3/20/2018 2:52 PM
                              [Save] [Cancel]

Notes & Attachments   [New Note] [Attach File] [View All]

Action	Type	Title	Last Modified	Created By
Edit | View | Del	Attachment	Brewster County_Revised Summary_PI Review.docx	3/20/2018 2:56 PM	Olivia Sara Pearson
Edit | View | Del	Attachment	Brewster County_Revised Summary.docx	3/20/2018 2:55 PM	Patricia Ayers

1.	To inform PCORI and the Translation Center that your review is complete, double click to in-line edit the **PI Reviews Revised Summary** field.
2.	Check the box to indicate that your review is complete.
3.	Click '**Save**.'

Once you click 'Save,' an email notification is automatically sent to the Translation Center informing them that you have completed your review. You will also receive a copy of this email for your records. Once the revised summary is finalized and posted to the PCORI website, you will be notified via email.