

PCORI Online Cheat Sheet: Engagement Award LOI Submission

Document updated to reflect the 2/1/2021 system change.

Important Reminders

⚠ IMPORTANT: These instructions supersede and replace previous instructions due to recent updates to the LOI form.

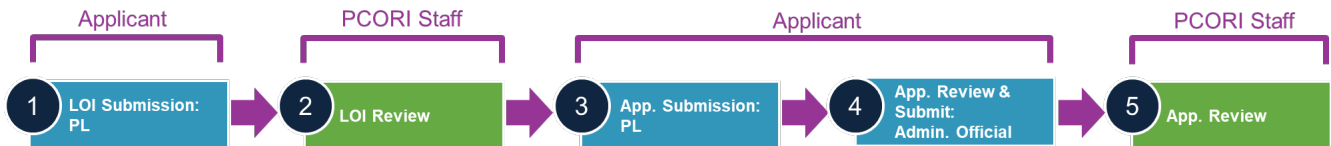
This Cheat Sheet provides guidance on how to:

- Navigate to and Select Funding Opportunity
- Navigate to Draft Letter of Inquiry (LOI)
- Complete and Submit LOI

Please keep in mind the following user roles:

User Role	Definition
Project Lead 1 (Contact PL)	Institution's primary point of contact for all communication throughout the lifecycle of the project, from LOI submission to project completion; is responsible and accountable for project execution, compliance, and organizational conduct.
Project Lead 2 (Co-PL)	This role is optional. Applicants should consult the Engagement Awards Submission Instructions for further details about the new user role and all other user roles.
PL Designee	An individual selected by the Project Lead (PL) to act as a <i>backup or alternate</i> .
Administrative Official (AO)	Responsible for matters related to the award and administration of the agreement, including approving the application submission, overseeing contract modifications, and other required materials.

LOI and Application Process: The image below illustrates the LOI and Application submission and review process. Applying for Engagement Award funding from PCORI is a two-stage process. An LOI must be submitted before an organization is invited to submit a full Application. Specific requirements and guidance to complete a successful LOI and subsequent Application are found in the specific funding announcement, Submission Instructions, and Submission Checklist.



📖 NOTE: Some questions vary between PFA type but the general instructions apply to each type.

⚠ IMPORTANT: If you're applying for the Engagement Award: Dissemination Initiative PFA, please pay careful attention to the **Attachments** tab.

Navigate to and Select Funding Opportunity






An LOI must be submitted before an organization is invited to submit a full Application.

Search for Funding Opportunities through PCORI Online:


1.	Log-in to PCORI Online .
2.	From the PCORI Online home page, click the ' Engagement Awards ' button.
3.	Click ' Funding Opportunities .'
4.	Scroll down and click on the Eugene Washington PCORI Engagement Award funding opportunity to which you will apply.
5.	Click ' Apply .'



Letter of Inquiry (LOI) Submission





Once you have navigated to the LOI form, you can enter the requested information. Required fields are designated with a red asterisk (). At the top and bottom of each tab, there are buttons that will help with navigation:*

Icon	Definition	
Save	Use ' Save ' to automatically save all the information you entered.	
Save & Next	Use ' Save & Next ' to automatically save the information you entered, as well as navigate to the next tab.	
Cancel	Use ' Cancel ' to clear any unsaved changes made on the current tab.	
Review/Submit	Use ' Review/Submit ' when you have completed all tabs of the LOI and are ready to submit to PCORI.	
Clear Changes	Use ' Clear Changes ' when you want to remove any unsaved responses or text.	


The following steps will walk through the LOI form, which contains the following tabs, in this order:

LOI Tabs		
Contact Information	Select the applying organization and identify the Project Lead(s) and individuals for the AO role and PL designee roles (if applicable).	Contact Information
Pre-Screen Questionnaire	Verify your project is responsive to programmatic requirements.	Pre-Screen Questionnaire
Organization & Project Lead Details	Provide information about the organization, and the Project Lead's PCOR/CER experience and history with PCORI and other funders.	Organization & Project Lead Details
Project Summary	Add Project Name, Background, Proposed Solution, Objectives, Methods, Outcomes, Patient & Stakeholder Engagement Plan, Evaluation Plan, and Sustainability Plans.	Project Summary
Additional Project Information	Provide budget summary, requested project start and end dates, and information about the populations and stakeholders to be engaged.	Additional Project Information
Using PCORI-funded Evidence & Tools	Inform whether PCORI-funded evidence will be disseminated, or PCORI-funded engagement tools or resources will be used or adopted.	Using PCORI-funded Evidence & Tools
Attachments	In the Engagement Award: Dissemination Initiative PFA, applicants must upload the <i>Engagement Award: Dissemination Initiative LOI Supplemental Template</i> .  CAUTION: This tab only applies to the <i>Engagement Award: Dissemination Initiative PFA</i> .	Attachments
Authorizations	Select 'Yes' to certify that you are authorized to submit this LOI.	Authorizations


Complete and Submit LOI	
Contact Information Tab	
 IMPORTANT: Project Lead & Organization Name are required to save the LOI.	
1.	Click the magnifying glass icon to open the Lookup window. Search for and select the Project Lead 1 (Contact PL) and Organization Name . ➤ Only Project Personnel with active PCORI Online accounts will appear in the Lookup search results.
2.	Click the magnifying glass icon to open the Lookup window. Search for and select the Project Lead 2 (Co-PL) and Organization Name . ➤ Only Project Personnel with active PCORI Online accounts will appear in the Lookup search results.
3.	Click the magnifying glass icon to open the Lookup window. Search for and select the Administrative Official (AO) and PL Designee 1 and 2 (if applicable). ➤ Only Project Personnel with active PCORI Online accounts will appear in the Lookup search results.  NOTE: AO is required for LOI submission but not to generate an LOI number.
4.	Click ' Save ' to stop here <u>OR</u> click ' Save & Next ' to continue to the Pre-Screen Questionnaire tab.

Pre-Screen Questionnaire Tab	
1.	Read the bulleted information at the top of the page. Use the drop-down menu to select 'Yes' or 'No' to indicate if your project contains any of the activities listed on the page. ➤ <i>If you answer 'Yes,' your LOI will be screened as non-responsive and will not be reviewed .</i>
2.	Click ' Save ' to stop here <u>OR</u> click ' Save & Next ' to continue to the Organization & Project Lead Details tab.
Organization & Project Lead Details Tab	
 IMPORTANT: All narrative text entry fields on this tab are limited to 1,000 characters INCLUDING spaces.	
1.	Provide Organization and Project Lead Information (i.e. Financial Status, EIN Number, Organizational History, Capacity and Mission, etc.).
2.	Click ' Save ' to stop here <u>OR</u> click ' Save & Next ' to continue to the Project Summary tab.
Project Summary Tab	
 IMPORTANT: All narrative text entry fields on this tab are limited to 1,000 characters INCLUDING spaces.	
1.	Fill out information regarding your Project Summary (i.e. Project Name, Background, Objectives, Methods and Outcomes, etc.).  NOTE: As indicated in the funding announcement, applicants for an Engagement Award: Dissemination Initiative are required to focus their project on one of two tracks: (a) Building Capacity for Dissemination, or (b) Active Dissemination. Select the funding track that you are applying to. <i>This selection is only required for Engagement Award: Dissemination Initiative applicants.</i>
2.	Click ' Save ' to stop here <u>OR</u> click ' Save & Next ' to continue to the Additional Project Information tab.
Additional Project Information Tab	
 IMPORTANT: All narrative text entry fields on this tab are limited to 1,000 characters INCLUDING spaces.	
1.	Provide Amount Requested from PCORI, Total Project Budget , and a narrative describing how he amounts requested will be used .
2.	Provide the requested project start and end dates.
3.	Answer questions related to the project's topic and population focus.
4.	Provide experiential evidence of established relationships with the population with whom you intend to engage.
5.	Select the option that indicates whether this is a previously existing project funded by others .
6.	Click ' Save ' to stop here <u>OR</u> click ' Save & Next ' to continue to the Using PCORI-funded Evidence & Tools tab.

Using PCORI-funded Evidence & Tools Tab

 **NOTE:** Pay careful attention to the information requirements on this tab as each PFA type contains unique questions and not all questions may appear.

1.

PCORI offers multiple funding opportunities. Each funding opportunity has unique requirements that include answers to specific questions related to that requirement. You will be prompted to answer only those questions necessary to satisfy the information requirements for your particular PFA type.
 **NOTE:** Those fields marked with a red asterisk * are required.

2.

When all required information has been entered, click **'Save'** to stop here OR click **'Save & Next'** to continue to the **Attachments** tab.

Attachments Tab



CAUTION: This tab **only** applies to the *Engagement Award: Dissemination Initiative PFA*. If you are **not** applying to that PFA, skip to the **Authorizations Tab**.

1.

Select **Choose file** and select the document you wish to upload.

2.

Click **Upload**.

3.

Click **'Save'** to stop here OR click **'Save & Next'** to continue to the **Authorizations** tab.

Authorizations Tab

1.

Review the statements on the page. Select **'Yes'** or **'No'** to indicate the information in the LOI is correct and that you are authorized to submit the LOI.
➤ *If you answer 'Yes,' you will be given your LOI number. Retain this number for future reference.*

2.

Click **'Save'** then scroll to the top of the page.

Review & Submit

1.

When you have completed the LOI and are ready to submit, click **'Review/Submit'** at the top right of your screen.

2.

Review details and click **'Submit.'**

3.

In the pop-up message, click **'OK'** to verify your submission.

The submitted LOI will still be accessible through the LOI/Application Dashboard and will be read-only.

Navigate to Draft Letter of Inquiry (LOI)

If you have started a LOI for a PCORI funding opportunity, you can navigate to the draft through PCORI Online.

1.

Log-in to [PCORI Online](#).

2.

From the PCORI Online home page, click the **'Engagement Awards'** button.

3.

Click **'Engagement Awards Dashboard'** to navigate to the LOI/Application Dashboard.

4.

On the left-side menu, click **'LOIs.'**

5.

Under **Open Items**, locate the draft LOI you would like to continue editing, and click the **'Edit'** icon.