

PCORI's New Online Award Management Portal


Post-Award Management

January 23, 2017




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Welcome!




Shevonne Polastre
Senior Systems
Project Manager, IT



James Hulbert
Assistant Director,
Financial Compliance



Brett Anderson
PCORI Training Team




Robin Nichols
PCORI Training Team

Introductions

Focus Group Goals

Training Resources



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Agenda



Introduction to the Portal

In this section, you will master the following activities:

- Getting Started
- Navigating the Portal

Getting Started: Logging In

If you are a current PCORI Awardee, your account has been added to the system and you will need to reset your password. Click 'Forgot your password?' to get started.

The screenshot shows the PCORI login page. A callout box labeled '1' points to the 'Forgot your password?' link, with the text 'Click 'Forgot your password?' to retrieve it'. Another callout box labeled '2' points to the 'Reset Password' button on the subsequent screen, with the text 'On the following screen, enter your username (i.e. your email address), and click 'Reset Password''. A 'Learning Point' box states: 'Your user name is the email address you use when interacting with PCORI.' The login page also includes fields for 'User Name' and 'Password', a 'Log in' button, and a 'New User?' link.



Email Notification: After selecting 'Reset Password,' you will receive a system-generated email with instructions on how to update your password.



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Getting Started: Logging In

If you are a new PCORI Awardee, click on 'New User' to obtain login information.

The screenshot shows the PCORI login page. A callout box labeled '1' points to the 'New User?' link, with the text 'If you are a New User and don't know your login information, click 'New User?'. Another callout box labeled '2' points to the 'New User' form, with the text 'Once you complete the New User Form, you will receive an email welcoming you to the portal with a link to log-in'. The form includes fields for 'First Name', 'Last Name', 'Email', 'Confirm Email Address', 'Password', and 'Confirm Password'. It also includes a 'Join PCORI Portal' button and a checkbox for terms of use.

Note: If you have new project staff, please reach out to PCORI at fundedofa@pcori.org.



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Navigating the Portal: Home Screen

The home screen allows you to access multiple PCORI award management features, including Engagement Awards and Research Awards.

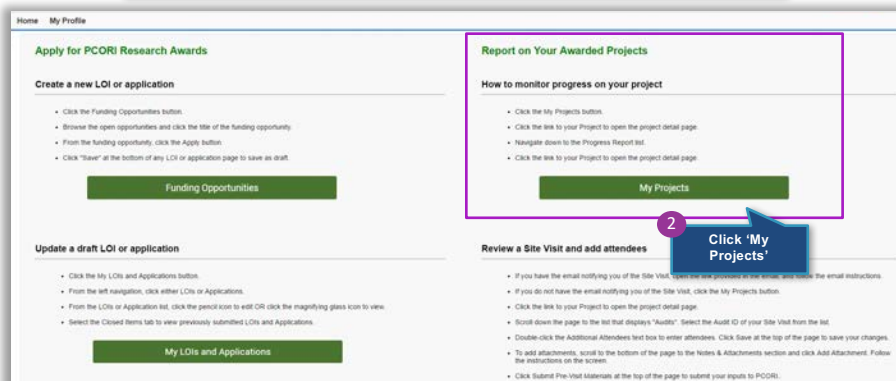


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Navigating the Portal: My Projects

To view existing awarded Projects, get started by clicking on 'My Projects.'



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Navigating the Portal: My Projects

Click on the **Project Title** to view your project information on the **Project Detail** page, including project staff, contractual information, progress reports and more.

Home My Profile

My Research Awards Projects

My Research Awards Projects

	Short Project Title	Awardee Institution/O...	Contract Start Date*	Contract End Date*	Status
<input type="checkbox"/> A...	Brewster County Asth...	California Center for R...	3/31/2014		Executed



Learning Point

Please reach out to fundedpfa@pcori.org if you have not been granted access to your projects.

3

Click on the Project Title to view Project Details

Home My Profile

Brewster County Asthma Comparative Effectiveness Research Project

[Back to List](#)

[Milestones - Deliverables \(5\)](#) | [Progress Reports \(5\)](#) | [Project Personnel \(2\)](#) | [Publications \(4\)](#) | [IRB \(1\)](#) | [Notes & Attachments \(2\)](#)

Project Detail

Project Summary

Project Record Type	Research Awards	Status	Executed
Contract Number	AS-1306-05876	Cycle	Aug-13



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Navigating the Portal: Project Details

At the onset of the project, PCORI will load project information into the system, which will appear on the **Project Detail** page.

Home My Profile

Brewster County Asthma Comparative Effectiveness Research Project

[Back to List](#)

[Milestones - Deliverables \(5\)](#) | [Progress Reports \(5\)](#) | [Project Personnel \(2\)](#) | [Publications \(4\)](#) | [IRB \(1\)](#) | [Notes & Attachments \(2\)](#)

Project Detail

Project Summary

Project Record Type	Research Awards	Status	Executed
Contract Number	AS-1306-05876	Cycle	Aug-13
Awardee Institution	California Center for Research and Prevention	Project Start Date*	2/1/2014
Project Title	Brewster County Asthma Comparative Effectiveness Research Project	Project End Date*	
Project Description	Asthma Comparative Effectiveness Research Project	Kickoff	
Project Focus	Respiratory Diseases	Mid-Point	8/2/2015
PEA	Treatment Options for African Americans and Hispanics/Latinos with Uncontrolled Asthma	Application Number	1306-05876
PFA Type	Pilot Projects	Application Amount	\$4,000,001.03
Priority Area	Addressing Disparities	Resubmission	
		Resubmission ID	

Note: Not all fields are editable. If any information in these sections is incorrect or missing, please reach out to fundedpfa@pcori.org or get in contact your PCORI Program Officer/Contract Administrator.



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Navigating the Portal: View Lists

Hover links at the top of the Project Detail page will allow you to easily navigate your projects.

5 Place your cursor over these **hover links** to view items from the list

6 Click a link in the list to navigate to the item

7 Click 'Go to list' to view all items

Learning Point
Review key information on the items in this list to ensure accuracy.

Action	Milestone - Deliverable Number	Milestone - Deliverable Type	Milestone - Deliverable ID	Milestone - Deliverable Name	Active	Milestone - Deliverable Status	Due Date
Edit	B-000029941	D4		Begin study recruitment and data collection*	<input type="checkbox"/>	Not Completed	4/1/2015
Edit	B-000029942	E2		Mid-point for study recruitment and data collection	<input type="checkbox"/>	Not Completed	8/15/2015
Edit	B-000029943	E5		DSMB	<input type="checkbox"/>	Not Completed	10/1/2015
Edit	B-000029944	E5		Complete study recruitment and data collection	<input type="checkbox"/>	Not Completed	12/31/2015
Edit	B-000029945	F1		Begin post-intervention data collection	<input type="checkbox"/>	Not Completed	

PCOR Staff

Program Officer: Philippe Chert
Program Associate: [Name]
Engagement Officer: [Name]

Contract Administrator: [Name]
Contract Coordinator: [Name]



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Navigating the Portal: View Lists, Cont'd

Filter and sort to better view your project information.

8 Click a column name to sort

9 Click a letter to filter the column alphabetically

Action	Milestone - Deliverable Number	Milestone - Deliverable Type	Milestone - Deliverable ID	Milestone - Deliverable Name	Active	Milestone - Deliverable Status	Due Date
Edit	B-000029945	D1		Report Submission	<input type="checkbox"/>	Not Completed	7/31/2015
Edit	B-000029946	D10		Recruit research assistants	<input type="checkbox"/>	Not Completed	2/2/2015
Edit	B-000029947	D11		Begin family intervention	<input type="checkbox"/>	Not Completed	7/1/2015
Edit	B-000029948	D12		Capture input from clinic-stakeholder advisory group meetings (Engagement)	<input type="checkbox"/>	Not Completed	7/1/2015
Edit	B-000029949	D2		Patient/Stakeholder Engagement Update (Engagement)	<input type="checkbox"/>	Not Completed	7/31/2015
Edit	B-000029950	D3		Train research assistants	<input type="checkbox"/>	Not Completed	3/2/2015
Edit	B-000029951	D4		Participant screening	<input type="checkbox"/>	Not Completed	3/2/2015
Edit	B-000029952	D5		Begin study recruitment and data collection*	<input type="checkbox"/>	Not Completed	4/1/2015
Edit	B-000029953	D6		Train school coordinator	<input type="checkbox"/>	Not Completed	4/30/2015
Edit	B-000029954			Train clinic staff	<input type="checkbox"/>	Not Completed	6/30/2015



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To recap, we've reviewed the following activities:



- Getting Started
- Navigating the Portal

Live Demonstration!

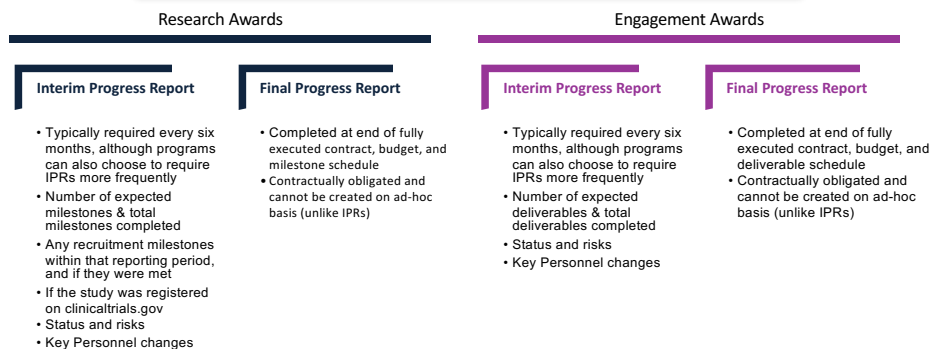
Progress Reporting

In this section, you will master the following activities:

- Introduction to Progress Reports
- Updating & Submitting Progress Reports
- Approving Progress Reports

Introduction to Progress Reports: Project Types

PCORI Online will feature tailored **Interim and Final Progress Reports** for both Research Awards and Engagement Awards.



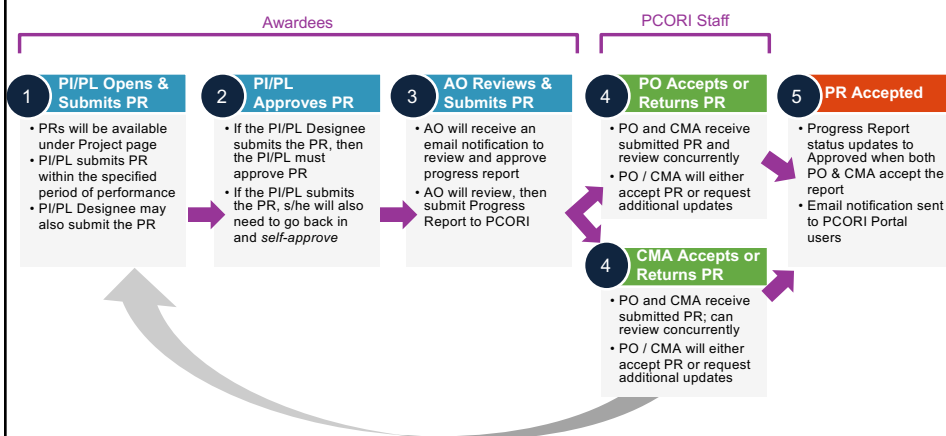
Note: Interim Progress Reports (IPRs) can be requested ad-hoc if needed.



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Introduction to Progress Reports: Business Process

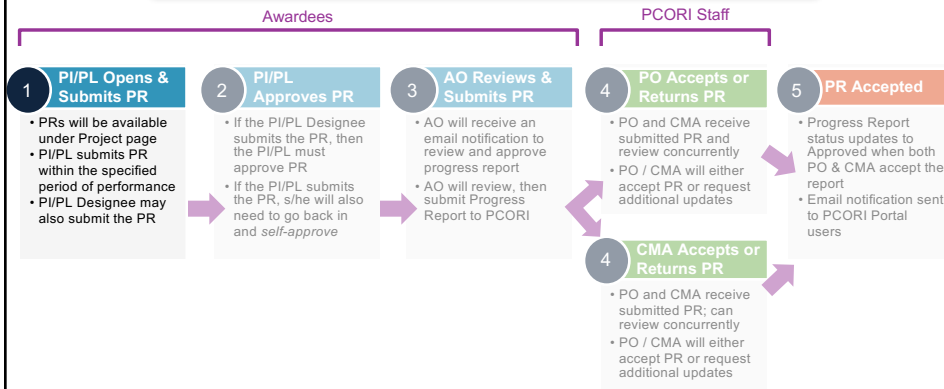


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Updating & Submitting Progress Reports

The following section provides an overview on how to **update** and **submit** Progress Reports. These slides will help guide Awardees through the different sections and formatted questions of the Progress Report.



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Updating Progress Reports: Getting Started

The PI/PL or PI/PL Designee will be chiefly responsible for updating the Progress Report. To update a specific Progress Report, select the **Progress Report ID** and select the 'Edit' button on the subsequent page.

The screenshots illustrate the steps to update a progress report:

- 1 Navigate to the Progress Reports section within the Project Detail Page**: A screenshot of the 'Progress Reports' table with columns: Action, Progress Report Number, Status, Iteration of Progress Report, Start Date, and Due Date. The 'Edit' button next to the first report is highlighted.
- 2 Click on the progress report ID to open a specific progress report page**: A screenshot of the 'PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS' page. The 'Edit' button is highlighted.
- 3 Select 'Edit' to update Progress Report**: A screenshot of the 'Edit' button on the progress report page.



Email Notification: The PI/PL and the AO will receive email notifications 30 days/15 days/1 day prior to due date for unsubmitted progress reports in Open or Returned status.



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Updating Progress Reports: Quick Tips

The Progress Report is **editable by page** and can be navigated by using the 'Previous' and 'Next' buttons. The pages correlate to different sections of the Progress Report, including Contact Information, Milestone Updates, and Financial Status, among other items.

PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS

Read the instructions before editing each section

Previous Section | Quick Save | Cancel | Next Section

Previous Section | Quick Save | Cancel | Next Section

Click 'Previous Section' button to navigate back to previous page

Edits to the Progress Report can be saved at anytime by clicking 'Quick Save'

After filling in required information on page, select the 'Next Section' button to proceed

Helpful hint: Selecting 'Previous Section,' 'Next Section,' or 'Quick Save' will automatically save any work entered into Progress Report. Clicking 'Cancel' will close the Progress Report (if selected, any unsaved information will not be retained).

Edit Progress Report



Updating Progress Reports: Content Overview

The Progress Report **content and structure varies** for Research Awards and Engagement Awards projects (example IPR sections shown in the tables below). Most sections will require detailed updates from the Awardee team.

Research Awards:

Page	Content
1	Progress Report Detail, Principal Investigator and Institution Updated Contact Information, Key Patients & Other Stakeholders
2	Milestone Update
3	Recruitment, Enrollment, and Retention Update
4	Accomplishments and Challenges, Methodology Standards
5	Engagement
6	Financial Status Update, Key Personnel Effort Update, Key Personnel Level of Efforts
7	Publications Update, Additional Documents
8	Progress Statement for Public Use, Certification

Engagement Awards:

Page	Content
1	Progress Report Detail, Project Lead Contact Information
2	Deliverables Update
3	Accomplishments and Challenges
4	One Paragraph for Public Use, Financial Status Update, Key Personnel Effort Update, Key Personnel Level of Efforts
5	Attachments and Other Publications, Publications, Notes & Attachments
6	Certification

Note: To review each detailed page and section of the RA Progress Report, refer to Appendix B.



Updating Progress Reports: Navigation

Some sections, such as those in first page below, will be non-editable and for review only. Other sections will request Awardees for project updates in the form of dropdowns, summary tables and open ended questions.

1 Review information on the Progress Report detail and Key Project Personnel

2 If any information in these sections is incorrect or missing, please reach out to fundedpfa@pcori.org

Edit Progress Report

Updating Progress Reports: Navigation, Cont'd

On certain pages, the PI/PL or Designee can add new information by clicking on the button in the respective section, prompting a new page to appear. There, additional information can be populated in the dropdowns and open fields.

3 Click 'New Project Personnel' to add entries into the Key Patients and Other Stakeholders section

4 Select the record type for the new personnel

Edit Progress Report

Updating Progress Reports: Navigation, Cont'd

Once new information is added, the user can continue to edit the record, or can return to the Progress Report home page.

5 Enter the new project personnel's information, and click 'Save'

6 Click 'Edit' to make any more changes

7 Click 'Back to Report' to return to the Progress Report

Learning Point
Clicking 'Back to Report' will send the user back to the home page of the Progress Report.

Edit Progress Report



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Updating Progress Reports: Navigation, Cont'd

For Research Awards, a page in the Progress Report is dedicated for Recruitment which will include **summary tables** for demographics of the study and additional recruitment reports.

Click 'New Recruitment' or 'Update Cumulative Race/Ethnicity Table' to open a new window and update the information

Learning Point
Additional guidance will be provided for PCS recruitment.

Updated information will automatically populate the summary tables, as shown in the Observational Study table here

Site Name	Interim Progress Report Months	Project Months	Date of Update	Planned Sample Size	Total Screened(N)	Total Eligible(N)	Total Enrolled Period(N)	Total Lost to Follow Up(N)	Percentage Lost to Follow Up
Brewster - Observational Study	18-Months	18-Months	06/01/2016	25	20	18	18	2	11.11



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Updating Progress Reports: Navigation, Cont'd

Certain pages of the Progress Report will require Awardees to respond to **open-ended questions** with text input, often with a word limit for the response.

PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS

Previous Section Quick Save Cancel Next Section

ACCOMPLISHMENTS AND CHALLENGES

Discuss and document study progress and all significant events for the current reporting period. In particular, please discuss:

1. Any significant change from the funded application, including changes in the study protocol, engagement plan, endpoints, sample size, etc. Include reasons for these changes. Please note that you should discuss changes with PCORI program staff prior to implementation and some change require prior approval from PCORI (see your executed funding contract for changes that require prior approval).

METHODOLOGY STANDARDS

Please report how your project meets PCORI's Methodology Standards that apply to your ongoing research (enter N/A if appropriate). The following Standards should be addressed at the appropriate study phases (see table below):

Methodology Standards to address	Report how these Methodology Standards are being met
Upon Study Protocol Completion	
Data Integrity and Rigorous Analysis (IR-1, IR-2, IR-3, IR-4) (32,768 character limit)	

[Edit Progress Report](#)



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Submitting Progress Reports

Both the PI/PL and the Designee can **submit** the PR. If the PI/PL submits, they will need to self approve the Progress Report. If the Designee submits the Progress Report, they will need approval from the PI or PL.

CERTIFICATION

After the Submit button is clicked, an approval process will begin within the Approval History section below. This report must be approved by the Principal Investigator and the designated Administrative Official (AO).

Principal Investigator:

By clicking Approve within this report's Approval process, I, as a Principal Investigator, certify that I have reviewed and approved this progress report (and any associated attachments, if applicable), and the information provided is correct.

Paul Ingalls
8/31/2016

Administrative Official:

By clicking Approve within this report's Approval process, I, as an Administrative Official, certify that I have reviewed and approved this progress report (and any associated attachments, if applicable), and the information provided is correct.

Amanda Oliver
8/31/2016

Previous Section Quick Save Cancel **Submit**

Learning Point
The Certification page is the final page of the Progress Report.

To complete the Progress Report, click 'Submit'



Email Notification: The AO will be notified when the PI/PL approves the Progress Report for their review.

[Submit Progress Report](#)

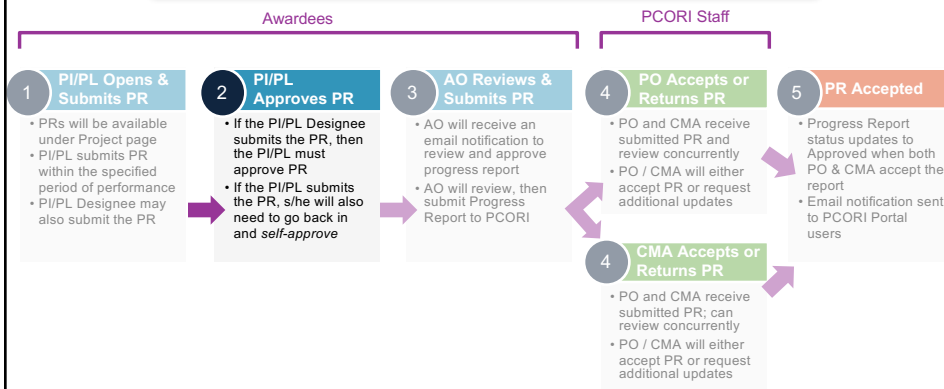


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Approving Progress Reports: PI/PL Approval

The following section provides an overview on how the PI/PL will **approve** Progress Reports.



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Approving Progress Reports: PI/PL Approval, Cont'd

After PR submission, the PI/PL must **approve** the progress report and add comments as needed.

The screenshots show the 'Approval History' and 'My Profile' sections of the PCORI Progress Report Approval interface.

Approval History:

Action	Assigned To	Actual Approver	Comments	Overall Status
Step: PI Approval (Pending for Review)				Pending
Reassign Approve / Reject	3/25/2016 9:31 PM	Pending	Paul Ingalls	Paul Ingalls

My Profile:

Progress Report: GR-000006465

Approval Request Approval Request

Progress Report Number: GR-000006465

Comments: [Text area]

Buttons: [Approve] [Reject]

Approval History (PCORI Progress Report Approval Process):

Date	Status	Actual Approver	Assigned To	Comments	Overall Status
3/25/2016 9:31 PM	Pending	Paul Ingalls	Paul Ingalls		Pending
3/25/2016 9:31 PM	Submitted	Paul Ingalls	Paul Ingalls	Submitted for approval. Please approve.	

Note: If a PI/PL, rather than the Designee, is the first to submit the PR, the PI/PL must approve their own report before it is sent to the AO for final approval.

Approve Progress Report - PI/PL

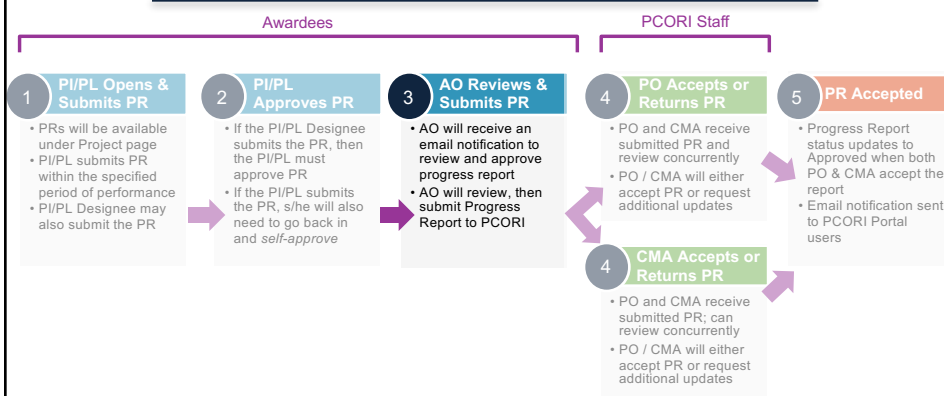


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Approving Progress Reports: AO Approval

The following section provides an overview on how the AO will **approve** Progress Reports.



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Approving Progress Reports: AO Approval, Cont'd

Once the PI/PL has approved the PR, the AO will receive an email to approve or reject. The AO can access the report by navigating to the **Progress Reports** list from the Project Details page.

- 1 Open the Project Details page and navigate to the 'Progress Report' section**
- 2 Review the Progress Report Status to monitor any approvals or returns of the Progress Report made by PCORI**
- 3 Select the progress report ID**

Action	Progress Report Number	Progress Report Name	Progress Report Status	Iteration of Progress Report	Start Date	Due Date	Submission Date	Late Status Indicator
Edit	GR-000008656	IPR - 12 Month	Returned	12-Months	7/1/2016	12/31/2016	7/15/2016	On Time
Edit	GR-000008657	IPR - 18 Month	Open	18-Months	1/1/2017	6/30/2017		On Time
Edit	GR-000008658	IPR - 24 Month	Open	24-Months	7/1/2017	12/31/2017		On Time
Edit	GR-000008671	IPR - 6 Month	Accepted	6-Months	1/1/2016	6/30/2016	7/15/2016	Late
Edit	GR-000008742	Final Progress Report	Open		1/1/2018	7/31/2018		On Time

Show 1 more » | Go to last

Approve Progress Report - AO



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Approving Progress Reports: AO Approval, Cont'd

After accessing the Progress Report, the AO reviews the information entered by the PI and approves the progress report that is then automatically submitted to CMA and the Program Officer.

The screenshot shows the 'Approval History' table and the 'Approve/Reject Approval Request' form. Callout 4 points to the 'Approve / Reject' button in the table. Callout 5 points to the 'Comments' field in the form, which contains 'AO approved'. Callout 6 points to the 'Comments' field in the table, which contains 'Comments will appear on the main page of the Progress Report'.

Approval History

Action	Assigned To	Actual Approver	Comments	Overall Status
Step: AO Approval (Pending for first approval)	Amanda Oliver	Amanda Oliver		Pending
Reassign				
Step: PI Approval	Approved	Paul Ingalls	Paul Ingalls	Approved
Approval Request				

Approve/Reject Approval Request

Progress Report: GR-000010790

Comments: AO approved

Buttons: Approve, Reject, Cancel

Helpful Hint: To review a more user friendly version of the Progress Report, select the 'View as PDF' button.



Email Notification: The PI/PL will be automatically notified when the AO submits the Progress Report, as well as the PO, PA, and CMA internally.

Review & Submit Progress Report to PCORI

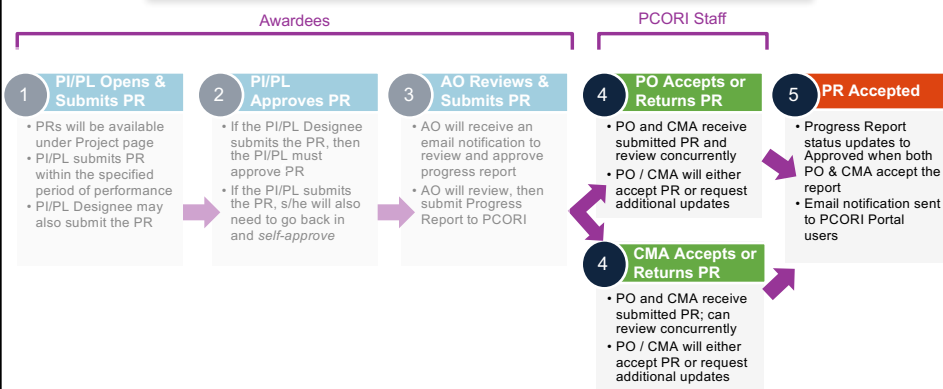


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PCORI Review & Acceptance

Once the Progress Report is submitted and approved by both the PI/PL and the AO, PCORI will either **accept the PR** or **request additional updates**.

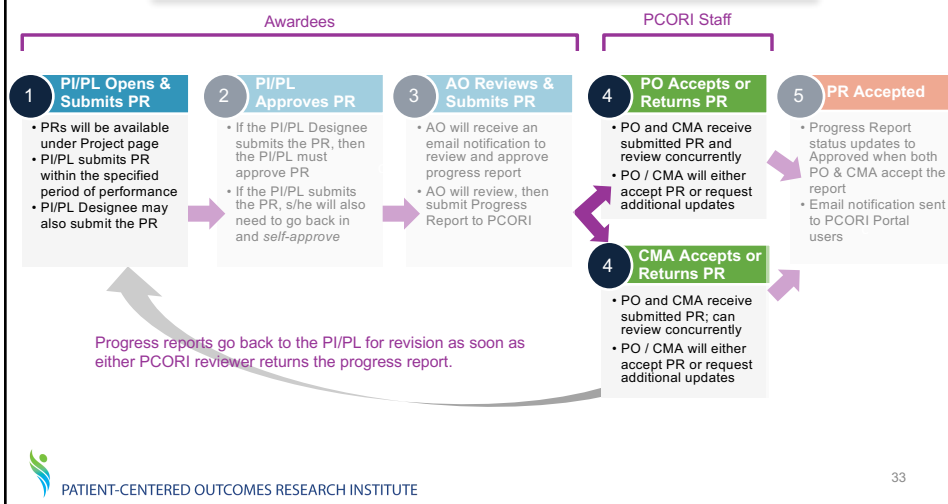


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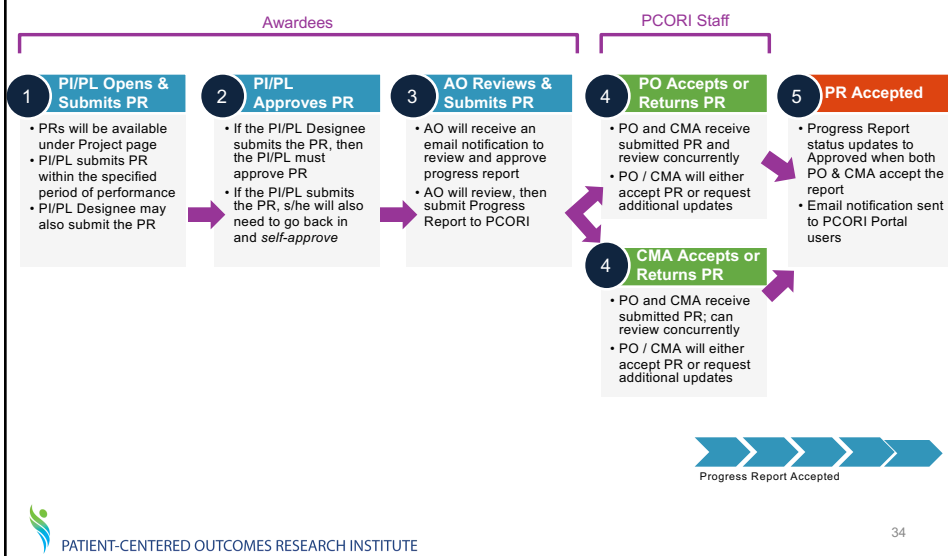
Resubmitting Returned Progress Report

The following section provides an overview on how to **resubmit** a returned Progress Report.



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Progress Report Acceptance



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To recap, we've reviewed the following activities:



- Introduction to Progress Reports
- Updating & Submitting Progress Reports
- Approving Progress Reports

Live Demonstration!

Project Management

In this section, you will master the following activities:

- Managing Milestones/Deliverables
- Reviewing Submitted Publications
- Reviewing Institutional Review Board (IRB) Status
- Submitting Notes & Attachments

Managing Milestones/Deliverables

Once a contract is awarded, Awardees will be provided access to view and/or edit additional relevant project information. To view **Milestones-Deliverables**, navigate to the bottom of the Project Detail page.

From the Project Details page, navigate to **Milestones-Deliverables**

Click a link in the list to navigate to the item

Learning Point
Deliverables will replace Milestones for Engagement Awards.

Action	Milestone - Deliverable Number	Milestone - Deliverable Type	Milestone - Deliverable ID	Milestone - Deliverable Description	Milestone - Deliverable Status	Due Date
Edit	B-000029927	D4	B-000029927	Begin study recruitment and data collection	Completed	4/1/2015
Edit	B-000029928	E2	B-000029928	Mid-point for collection	Completed	8/15/2015
Edit	B-000029929	E5	B-000029929	DSMB	Not Completed	10/1/2015
Edit	B-000029930	E5	B-000029930	Complete study recruitment and data collection	Not Completed	12/31/2015
Edit	B-000029931		B-000029931	Begin post-intervention data collection	Not Completed	4/1/2016

PCORI Staff
Program Officer: [Phillips Chan](#)
Contract Administrator: [Contract Administrator](#)
Contract Coordinator: [Contract Coordinator](#)



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Managing Milestones/Deliverables, Cont'd

Review the **Milestone - Deliverable Details**, including Description, Status, and Due Date. There will be times that PCORI will request information from Awardees. The portal has a feature that makes this easily managed through **Tasks**.

Learning Point
The Task Owner will be notified when a Milestone Task is assigned to them. A second notification will be sent if the task is not completed by the due date.

Review the Milestone-Deliverable Details

On the Milestone record, navigate to 'Tasks' to find Milestone Tasks that have been assigned to you

Action	Name	Priority	Status	Last Modified Date/Time
Edit	Submit B1 Milestone Progress	High	Not Started	6/29/2016 11:43 AM



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Managing Milestones/Deliverables: Tasks, Cont'd

Tasks will be used to reply to requests for information (ROIs) from PCORI staff regarding contractual milestones. To respond, click 'Edit' and update requested information.

The screenshot shows the 'Task Detail' page for a task named 'Submit B1 Milestone Progress'. It includes fields for Name, Description, Related To (B-000029234), Milestone - Deliverable Task Type, Enable Notification, Project Contact, System Information, Created By (Philippe Clark), and Reminder. A callout labeled '5' points to the 'Edit' button. A callout labeled '6' points to the 'Status' dropdown menu, which is currently set to 'Not Started'. A callout labeled '7' points to the 'Save' button. The 'Additional Information' section includes an 'External Notes' field and a 'Project Contact' field.



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Reviewing Submitted Publications

When viewing your projects, you can update and add information related to **Publications** surrounding your study, such as journals, newsletters and blogs.

The screenshot shows the 'Publications' list for the 'Brewster County Asthma Comparative Effectiveness Research Project'. The list has columns for Action, Publication Number, Title, Record Type, Status, and Publication Date. Callout '1' points to the 'Publications' link in the project navigation bar. Callout '2' points to the 'Edit' link for publication PUB-00000016. Callout '3' points to the 'Edit' button on the 'Publication Detail' page for PUB-00000016. The 'Publication Detail' page shows the publication number, title, record type, status, and publication date.



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Reviewing Submitted Publications, Cont'd

Review and update the information on the publication, including Status, Publication Type, and Publication Date.

Publication Edit
PUB-00000016

Publication Detail

Publication Number: PUB-00000016
Record Type: Publication
Title: Asthma in 7-10 year olds
Publication Type: organizational journals

Publication Information

Name of Publication: Brewster Health Digest
Status: Accepted/ in Press
Publication Date: 5/31/2016
Progress Report Number: [8/31/2016]

Authors: []
URL, if applicable: []

Learning Point
In order to create a new publication record, users will enter the information through a Progress Report.



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Reviewing IRB Status

Upon providing **Institutional Review Board (IRB)** documentation to PCORI, the status can be viewed within the Project Detail page.

Project
Brewster County Asthma Comparative Effectiveness Research Project

[Milestones - Deliverables \(5\)](#) | [Progress Reports \(5\)](#) | [Project Personnel \(2\)](#) | [Publications \(4\)](#) | [IRB \(1\)](#) | [Notes & Attachments \(2\)](#)

IRB

Action	IRB Name	IRB Description	IRB Active	IRB Approval Expected Date
Main	Brewster County June IRB	Center for Research on Disparities in Health Care for African Americans with Asthma	<input checked="" type="checkbox"/>	4/15/2016

IRB Detail

IRB Name: Brewster County June IRB
IRB Description: Center for Research on Disparities in Health Care for African Americans with Asthma
Project Title: Brewster County Asthma Comparative Effectiveness Research Project
IRB Approval Expected Date: 4/15/2016
IRB Approval Date: 12/9/2015
IRB Approval Expiration Date: 12/9/2016
IRB Active: ☒

From the Project Details page, navigate to the IRBs list

Find the IRB page you need to review and click it to open the page

View current information on the IRB page

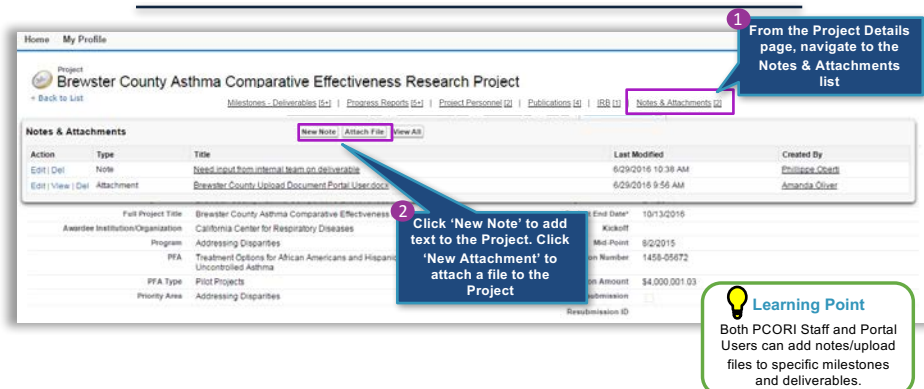


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Submitting Notes & Attachments

The **Notes & Attachments** section in the Portal allows users to send communications via notes or to attach documents to the project.



1 From the Project Details page, navigate to the Notes & Attachments list

2 Click 'New Note' to add text to the Project. Click 'New Attachment' to attach a file to the Project

Learning Point
Both PCORI Staff and Portal Users can add notes/upload files to specific milestones and deliverables.

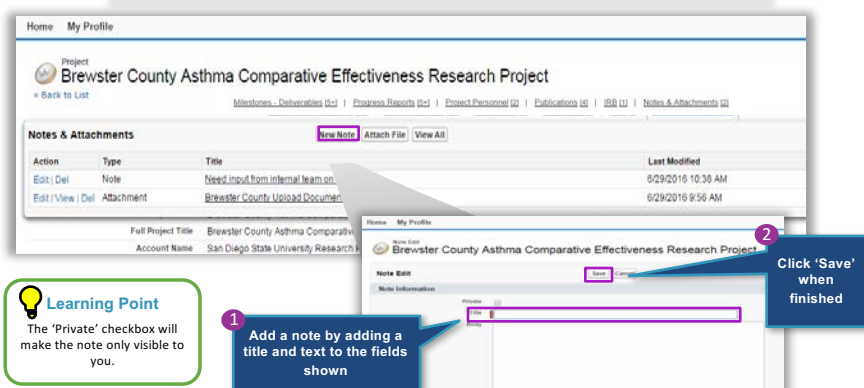


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Submitting Notes & Attachments: Add Note

Add a note by clicking 'New Note' under 'Notes & Attachments.'



1 Add a note by adding a title and text to the fields shown

2 Click 'Save' when finished

Learning Point
The 'Private' checkbox will make the note only visible to you.



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Submitting Notes & Attachments: Upload Attachment

Attach a file by clicking 'Attach File' under 'Notes & Attachments.'

Home My Profile

Project
Brewster County Asthma Comparative Effectiveness Research Project

« Back to List

Milestones > Deliverables (3) | Progress Reports (3)

Notes & Attachments

New Note Attach File View All

Action	Type	Title
Edit Del	Note	Need input from internal team on deliverable
Edit View Del	Attachment	Brewster County Upload Document Portal User.docx

Full Project Title: Brewster County Asthma Comparative Effectiveness Research Project
Account Name: San Diego State University

1. Select the file
Type the full name of the file or click the Browse button to find the file.
Choose File

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 project.
(This will cancel an in-progress upload.)
Done

4. Click 'Done' to save the file to the project

Note: These steps to upload a file are the same steps listed under [Managing Milestones: Tasks](#).



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To recap, we've reviewed the following activities:



- Managing Milestones/Deliverables
- Reviewing Submitted Publications
- Reviewing Institutional Review Board (IRB) Status
- Submitting Notes & Attachments

Live Demonstration!

Next Steps & Additional Resources

In this section, we will discuss the following:

- Course Conclusion
- Next Steps

Next Steps



Outstanding Questions?



Access training materials:

- Cheat Sheets
- User Guides
- FAQs



Navigate to <https://pcori.force.com/engagement> to log-in!

Appendix A

The following topics are included in Appendix A:

- Reassign Progress Report
- Resubmit Returned Progress Report
- Update User Profile Settings
- Email Notifications

Reassign Progress Report

Awardees can reassign the current step in the Progress Report submission process to another individual.

Home My Profile

PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS

[Cancel](#) [Edit](#) [View as PDF](#)

You do not have access to edit this report at this time.

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: AQ Approval (Pending for first approval)						● Pending
Reassign Approve / Reject	7/6/2016 2:42 PM	Pending	Amanda Oliver	Amanda Oliver		
Approve / Reject	7/6/2016 2:42 PM	Approved	Paul Ingalls	Paul Ingalls	PI approves the Progress Report	● Approved
Approve / Reject	7/6/2016 2:40 PM	Submitted	Paul Ingalls	Paul Ingalls	Submitted for approval. Please approve.	

1 Click 'Reassign'

Resubmit Returned Progress Report, Cont'd

If a Progress Report is not accepted by the PCORI Program Officer or CMA, the PI/PL and AO will receive an email notification that their Progress Report has been **returned**.

Progress Reports
Brewster County Asthma Comparative Effectiveness Research Project
Project: Brewster County Asthma Comparative Effectiveness Research Project

1. Navigate to the Progress Reports related list from the Project Detail page

Action	Progress Report Number	Progress Report Name	Progress Report Status	Iteration of Progress Report
Edit	GR-000008743	IPR - 12 Month	Rejected	
Edit	GR-000008742	Final Progress Report	Open	
Edit	GR-000008741	IPR - 6 Month	Accepted	
Edit	GR-000008468	IPR - 24 Month	Open	
Edit	GR-000008467	IPR - 18 Month	Open	
Edit	GR-000008466	IPR - 12 Month	Returned	12-Months

2. Select the progress report with the status of 'Returned'



Email Notification: The PI/PL and AO will receive an email notification when a Progress Report is returned. The PI will also receive a task notification.



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Resubmit Returned Progress Report, Cont'd

After navigating to the returned Progress Report, the PI/PL or Designee will make the modifications requested by PCORI in the email notification before **resubmitting** the Progress Report for approval.

3. Resubmit Progress Report

Previous Section Quick Save Cancel Submit

4. Select 'Approve' to resubmit for approval

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: AO Approval (Pending for first approval)						Pending
Reassign Approve / Reject	3/25/2016 9:39 PM	Pending	Amanda Oliver	Amanda Oliver		Pending
Step: PI Approval	3/25/2016 9:39 PM	Approved	Paul Ingalls	Paul Ingalls	Approved by PI	Approved
Approve	3/25/2016 9:31 PM	Submitted	Paul Ingalls	Paul Ingalls	Submitted for approval. Please approve.	

Note: The Progress Report will then continue along the normal approval flow to the AO and then on to PCORI Staff.



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Update User Profile Settings: My Profile

Awardees can also review **Profile Settings** from the PCORI Online home page, including your account information, including personal information, email address, and security settings

The screenshot shows the 'My Profile' page of the PCORI Portal. A callout box labeled '1' points to the 'My Profile' link in the top navigation bar with the instruction 'Click \'My Profile\''. Another callout box labeled '1' points to the 'Edit' link in the 'Contact Detail' section with the instruction 'Click \'Edit\' to update your account information'. A third callout box labeled '2' points to the 'Email Address Change Request' link with the instruction 'Click \'Email Address Change Request\' to update your email address'. A fourth callout box labeled '3' points to the 'Edit Employer Details' link with the instruction 'Click \'Edit Employer Details\' to edit information about your current employer'. The profile information for Mr. Paul Ingalls is displayed, including contact details, summary information, and a list of attachments.



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Update User Profile Settings: My Settings

Awardees can also manage **personal settings**, including Location and Security Settings.

The screenshot shows the 'My Settings' page of the PCORI Portal. A callout box labeled '1' points to the 'My Settings' link in the top right corner with the instruction 'Click \'My Settings\' at the top right of any page'. Another callout box labeled '2' points to the 'Location Settings' section with the instruction 'Click \'Location Settings\' change your location information such as your time zone'. A third callout box labeled '3' points to the 'Security Settings' section with the instruction 'Click \'Security Settings\' to reset your password or request a new user name'. The settings page includes sections for Location Settings, Activity Reminders, Security Settings, and Approved Connections.



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List of Email Notifications

Notification	Recipient	Description
Project now available on Portal	Awardee(s) the project is shared with	Manually sent by the PO
Milestone Task / Project Task created	Task Owner	When a new Milestone Task / Project Task assigned to a Portal User is created
Approaching Milestone deadline	PI/PL, Designee, AO	If Milestone Status is not Complete 15 days prior to due date
Approaching Milestone Task / Project Task deadline	Task Owner	If task assigned to a Portal User is not equal to "Complete" 3 days prior to due date
Milestone Task / Project Task past due	Task Owner	Sent the day after a task due date as well as every 5 subsequent business days until the task status is updated to "Complete"
Approaching unsubmitted Progress Report deadline	PI/PL, Designee, AO	If status is "Open" or "Returned" 30, 15, and 1 day(s) prior to due date
Progress report past due	PI/PL, Designee, AO	Sent if status is "Open" or "Returned" 2 days after due date as well as every 5 subsequent days
Progress Report External Review Process - AO Approval	AO	When status is PO Approved and every subsequent 5 business days the status remains in this status
Progress Report External Review Process - PI Approval	PI	When Submit for Approval is clicked and every additional 5 days the status does not change
Successful submission of Progress Report	PI/PL, Designee, AO	When Status = Submitted
Progress Report Reviewer's Decision (Accepted/Returned)	PI/PL, Designee, AO	When status is updated to "Accepted"/"Returned" (Exception: AO will not receive an email notification when PR is returned).
IRB expiration reminder	PI/PL, Designee, AO	Sent 30 and 15 days prior to project's IRB Approval Expiration Date
IRB missing	PI/PL, Designee, AO	Sent the day after the IRB Expected Approval Date as well as every 5 subsequent business days
Past due IRB Expired	PI/PL, Designee, AO	Sent the day after the IRB Expiration Approval Date as well as every 5 subsequent business days



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Appendix B

The following topics are included in Appendix B:

- Research Awards- Interim Progress Report (IPR) Submission: Detailed Steps

Updating & Submitting Progress Reports: Page 1

Page 1 of the Progress Report requests information on Progress Report Detail, Key Contact Information, Study Findings & Impact, Key Patients & Stakeholders.

Home My Profile

PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS

Quick Save Cancel Next Section

PROGRESS REPORT DETAILS

Progress Report Name: IPR - 12 Month
Status: Open
Late Status Indicator: On Time
Submit Date:
Contract #: AS-1308-05870

PRINCIPAL INVESTIGATOR AND INSTITUTION UPDATED CONTACT INFORMATION

PI Name: Paul Ingalls
PI Email: pi.pcori@gmail.com
PI Office Phone: 111-111-1111

AO Name: Amanda Oliver
AO Email: ao.pcori@gmail.com
AO Office Phone: 111-111-1111

Institution Legal Name: California Center for Respiratory Diseases

Edit Progress Report



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Updating & Submitting Progress Reports: Page 1, Cont'd

At the bottom at the page, review Key Patients & Stakeholders.

Home My Profile

PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS

Quick Save Cancel Next Section

Key Patients and Other Stakeholders

records to display

New Project Personnel

Edit Progress Report



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Updating & Submitting Progress Reports: Page 1, Cont'd

In order to complete the **New Project Personnel** record, select the Project Personnel Record Type and enter the requested information.

The screenshot shows the 'New Project Personnel' form. Callout 5 points to the 'Record Type of new record' dropdown menu, which has options: 'Engagement Award Project Personnel', 'Engagement Award Project Personnel', and 'Research Award Project Personnel'. Callout 6 points to the 'Continue' button. Callout 7 points to the 'Project Personnel Edit' form, which includes fields for First Name, Last Name, Status (set to 'None'), Progress Report Number (GR-000008538), and Classification (set to 'None'). Buttons for 'Save', 'Save & New', and 'Cancel' are visible. A blue arrow at the bottom right points to the 'Edit Progress Report' link.



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Updating & Submitting Progress Reports: Page 1, Cont'd

Complete edits to personnel information, and navigate **back to the home page** of the Progress Report.

The screenshot shows the 'Project Personnel Detail' form for KP-12230. Callout 7 points to the 'Edit' button. Callout 8 points to the 'Back to Report' button. The form displays the following information:

Project Personnel Detail	
Project Personnel Number	KP-12230
First Name	Eric
Last Name	Harrison
Status	Inactive
Progress Report Number	GR-000008467
Classification	
Project Personnel Background	
Title	Nephrologist
Institution/Org	NIH
Relevant Experience	10-15 years

A 'Learning Point' box on the right states: 'Clicking 'Back to Report' will send the user back to the home page of the Progress Report.' A blue arrow at the bottom right points to the 'Edit Progress Report' link.



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Updating & Submitting Progress Reports: Page 2

Page 2 of the Progress Report requests information on updated Milestones or Deliverables.

1
Review the list of Milestones/Deliverables

PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS

Previous Section
Quick Save
Cancel
Next Section

MILESTONES UPDATE

Milestones with the status Completed become locked and cannot be edited upon saving or navigating to another page. Ensure milestone information is entered correctly prior to marking the milestone as completed.

Columns A-D show milestone ID, name, description, and due date. Complete Columns E, F, G, H, and I for milestones due or completed during the current reporting period.

Column E: Enter milestone projected completion date.

Column F: Select appropriate status indicating milestone completion status during reporting period.

Column G: Select actual date of milestone completion.

Column H: If applicable, select appropriate Reason For Delay/non-completion of projected milestone during the specified reporting period.

Column I: If the Column H value is Other, provide other Reason For Delay.

2
Provide updates to individual Milestones/Deliverables by entering information into these fields

Column A	Column B	Column C	Column D	Column E	Column F	Column G	Column H	Column I
Milestone ID	Milestone Name	Description	Due Date	Projected Completion Date	Milestone Status	Completed Date	Reason For Delay	Other Reason For Delay
		Infant-parent asthma group quarterly to monitor treatment strategy and retention. Quarterly	2/27/2014		Not Completed		Other - please specify	Required

Lightbulb
Learning Point
If the reason for delay is 'Other,' please specify.

Edit Progress Report

Updating & Submitting Progress Reports: Page 3

For Research Awards, Page 3 in the Progress Report is dedicated for Recruitment which will include a summary table for demographics of study and ability to create new recruitment reports.

Lightbulb
Learning Point
Additional guidance will be provided for PCS recruitment.

PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS

Previous Section
Quick Save
Cancel
Next Section

RECRUITMENT, ENROLLMENT, AND RETENTION UPDATE

Instructions for completing recruitment, enrollment and retention table, and Site Information.

Complete recruitment tables and site information at every reporting period. Report cumulative information at each reporting period. Click the New Recruitment button to enter a new recruitment. Report site information for each distinct project activity that involves recruitment and enrollment of study participants. Each of the following may be distinct:

- Prospective trials
- Observational studies
- Focus groups
- In-depth interviews
- Surveys
- Recruitment of different participant populations (e.g., patients, providers, caregivers) for any of the above activities

1
Read the instructions for updating the recruitment information

Edit Progress Report

Updating & Submitting Progress Reports: Page 3, Cont'd

Before proceeding to the next page, review the existing tables for Recruitment and Cumulative Race/Ethnicity.

2
Review
existing
tables

Focus groups and Patients

Site Name	Interim Progress Report Months	Project Months	Date of Update	Planned Sample Size	Total Screened(N)	Total Eligible(N)	Total Enrolled Period(N)	Total Lost to Follow Up(N)	Percentage Lost to Follow Up
Recruitment - July	1-Month	12 Months							0.00
Recruitment - June	12-Months	12 Months	06/30/2016	20	5	4	4	1	25.00

Total Number of sites, clinics, and/or practices that have enrolled at least 1 participant: 1
Names of sites, clinics, and/or practices that have enrolled at least 1 participant:

Cumulative Race/Ethnicity table

Race	Male	Female	Total
American Indian/Alaska Native	2	1	3
Asian	2	2	4
Black/African American	1	1	2
Hawaiian/Pacific Islander	0	0	0
White	0	0	0
Multi-race	0	0	0
Other	0	0	0
Ethnicity			
Hispanic(Latino/Latina)	0	0	0
Non-Hispanic	0	0	0



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Updating & Submitting Progress Reports: Page 3, Cont'd

Update the Cumulative Race/Ethnicity Table with applicable information.

4
Click 'Update Values' to save changes to these fields to update in real time

New Recruitment **Update Cumulative Race/Ethnicity Table**

Update Cumulative Race/Ethnicity table with values below and click 'Update Values'.

American Indian/ Alaska Native Male	2
American Indian/ Alaska Native Female	1
Asian Male	4
Asian Female	2
Black/ African Male	1
Black/ African Female	1
Other Male	0
Other Female	0
Hispanic(Latino/Latina) Male	0
Hispanic(Latino/Latina) Female	0
Non-Hispanic Male	0
Non-Hispanic Female	0

Update Values

3
Click 'Update Cumulative Race/Ethnicity Table' to open a new window to update the information



Learning Point

If you have no answers that can be placed in these fields, enter "0" and continue.



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Updating & Submitting Progress Reports: Page 3, Cont'd

Awardees are also able to add **New Recruitment** information.

5 Click 'New Recruitment' to open a window that displays information to add recruitment lines

6 Complete the required fields

Please enter the Recruitment information in the fields below and click on 'Save Recruitment' when finished.

Cumulative Recruitment, Enrollment, and Retention of Study Participants:

Recruitment Name	Brewster County Asthma Comparative Effectiveness Research Project
Project Name	--None--
Activity Type	--None--
Participation Population	--None--
Interim Progress Report Months	
Project Months	
Date of Update	
Planned Sample Size	Enter Number
Total Screened (N)	Enter Number
# Eligible	Enter Number
# Enrolled	Enter Number
Total Lost to Follow up	Enter Number

➡ Edit Progress Report



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Updating & Submitting Progress Reports: Page 3, Cont'd

Use the Key at the bottom for additional instructions, and click 'Save Recruitment.'

Home My Profile

PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS

Previous Section Quick Save Cancel Next Section

RECRUITMENT, ENROLLMENT, AND RETENTION UPDATE

KEY:
Date of Update: The date that recruitment data were collected through.
Planned Sample Size: Sample size (number of individuals you plan to enroll) in your approved research plan. For group-level data such as a focus group, enter the numbers of groups, not the number of participants for each group.
Total Screened (N): Total number of individuals screened for eligibility to date. This is the number approached and/or tested (e.g., lab tests, review of medical history, survey, etc.) to determine potential eligibility for the project.
Eligible: Of the screened individuals, total number of individuals who met the eligibility criteria to date.
Enrolled: Of the eligible individuals, total number of participants enrolled to date.
Total Lost to Follow up: Number of participants that have been lost to follow-up (enter N/A if not applicable to your project).
Percentage Lost to Follow Up: Number lost to follow-up/total number enrolled * 100.

7 Click 'Save Recruitment'

➡ Edit Progress Report



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Updating & Submitting Progress Reports: Page 3, Cont'd

The tables will **immediately refresh** with updated information.

8 The Cumulative Race/Ethnicity fields automatically updated based on new inputs

Site Name	Interim Progress Report Months	Project Months	Date of Update	Planned Sample Size	Total Screened(N)	Total Eligible(N)	Total Enrolled Period(N)	Total Lost to Follow Up(N)	Percentage Lost to Follow Up
Recruitment - July	1-Month	12 Months							0.00
Recruitment - June	12-Months	12 Months	06/30/2016	20	5	4	4	1	25.00

Total Number of sites, clinics, and/or practices that have enrolled at least 1 participant: **1**
Names of sites, clinics, and/or practices that have enrolled at least 1 participant:

Race	Male	Female	Total
American Indian/Alaska Native	2	1	3
Asian	4	2	6
Black/African American	1	1	2
Hawaiian/Pacific Islander	0	0	0
White	0	0	0
Multi-race	0	0	0
Other	0	0	0
Ethnicity			
Hispanic(Latino/Latina)	0	0	0
Non-Hispanic	0	0	0



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Updating & Submitting Progress Reports: Page 4

On **Page 4** of the Progress Report, you will provide information on accomplishments and challenges for PCORI to evaluate your Project's current progress.

PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS

Previous Section Quick Save Cancel Next Section

ACCOMPLISHMENTS AND CHALLENGES

Discuss and document study progress and all significant events for the current reporting period. In particular, please discuss:

- Any significant change from the funded application, including changes in the study protocol, engagement plan, endpoints, sample size, etc. Include reasons for these changes. Please note that you should discuss changes with PCORI program staff prior to implementation and some changes require prior approval from PCORI (see your executed funding contract for changes that require PCORI prior approval and notice thirty (30) days in advance of the proposed changes). (500 character limit)
- Progress and accomplishments achieved during the reporting period. (Please include the specific milestone label as required.)

METHODOLOGY STANDARDS

Please report how your project meets PCORI's Methodology Standards that apply to your ongoing research (enter N/A if appropriate). The following Standards should be addressed at the appropriate study phases (see table below).

Methodology Standards to address	Report how these Methodology Standards are being met
Upon Study Protocol Completion	
Data Integrity and Rigorous Analysis (IR-1, IR-2, IR-3, IR-4) (32,768 character limit)	
Missing Data (MD-1, MD-2, MD-3, MD-4) (32,768 character limit)	

1 Respond to the questions under 'Accomplishments and Challenges' and 'Methodology Standards' section

Note: For Engagement Awards, this section will be on Page 3 of the PR. [Edit Progress Report](#)



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Updating & Submitting Progress Reports: Page 5

If there are updates to your project's engagement, update **Page 5** of the Progress Report.

1 Respond to the Engagement Report section by indicating that there is new information to enter

2 Click 'Next' to continue navigate through the sub-pages of the Engagement Report

Learning Point
Do not click 'Next Section' at the top of the page until you have completed all sub-pages of the Engagement Report.

Note: This page is not relevant for Engagement Awards.



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Updating & Submitting Progress Reports: Page 6

If necessary, provide PCORI with new information on the financial status of the project on **Page 6** of the Progress Report (similar to page 4 for EA).

1 Enter a Financial Status update in the box below the section

FINANCIAL STATUS UPDATE

Describe any significant deviations in costs and budget, how those deviations affected the study progress (e.g., staffing and cost estimates), and any anticipated need for budget modifications. (25,000 character limit)

[Edit Progress Report](#)



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Updating & Submitting Progress Reports: Page 6, Cont'd.

KEY PERSONNEL EFFORT UPDATE

Key Personnel changes should be reported. Click the New Key Personnel Level of Effort button below to report the individuals role, change in percentage effort, and an explanation for changes. Upload biosketches for all new key personnel in the Notes and Attachments section below.

☐ No changes in key personnel

Note any proposed changes to key personnel in the next 6 months, if applicable, and provide an explanation for changes, below. Add rows as necessary. If you have more than five proposed changes to report, please include additional information under Explanation of Changes. Upload biosketches for all new key personnel in the Notes and Attachments section below.

☐ No changes in key personnel

Previous Section Quick Save Cancel Next Section

Page 6 of 8

Key Personnel Level of Effort

No records to display

[View Report on a single page](#)

[New Key Personnel Level of Effort](#)

[Edit Progress Report](#)



Updating & Submitting Progress Reports: Page 6, Cont'd.

Key Personnel Level of Effort Edit

New Key Personnel Level of Effort

Save Save & New Cancel

Information

Progress Report GR-000006538

Personnel Name

Title

Contracted Percentage of Effort

Actual Percentage of Effort

Explanation of Changes

Contracted/Proposed --None--

Click 'Save'

Click 'Edit' to update the record. Click 'Back to Report' to return to the Progress Report

Key Personnel Level of Effort Detail

Project Personnel Level of Effort Number KPLOE-000019

Progress Report GR-000006538

Personnel Name Garret Wilson

Title Project Lead

Contracted Percentage of Effort 40.00%

Actual Percentage of Effort 25.00%

Explanation of Changes

Contracted/Proposed Contracted

Enter information on the personnel's level of effort, being sure to enter information into the highlighted fields

[Edit Progress Report](#)



Updating & Submitting Progress Reports: Page 7

On Page 7 of the Progress Report, review the 'Publications Update' and 'Additional Documents' sections, and upload any publications (if applicable).

PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS

Previous Section Quick Save Cancel Next Section

PUBLICATIONS UPDATE

REMINDER: Please make sure that all publications/communications contain the following acknowledgment:

Research reported in this [work, publication, article, report] was supported by the Patient-Centered Outcomes Research Institute (PCORI), its Board of Directors, and/or the Department of Health and Human Services, and is subject to the provisions of 45 CFR 112.103-112.105. The [views, statements, opinions] in this [work, publication, article, report] are those of the author(s) and do not necessarily represent those of PCORI, its Board of Directors, or the Department of Health and Human Services.

In the Publications section below, click the New Publication button to add a new publication.

Publications and/or presentations by any member of the research team, including patient and stakeholder participants, should be reported in this section.

1. In preparation to be submitted.
2. That have been submitted to a publication.
3. That have been accepted to a publication.
4. That are in press.
5. That have been published.

ADDITIONAL DOCUMENTS

All attachments should be uploaded to this form for review by PCORI. Any documents that you feel are relevant and noteworthy can be shared, such as:

1. Copies of drafts of instruments, data dictionaries, educational materials, manuals, or other project deliverables, if not already delivered
2. Abstracts from presentations made to professional groups or associations
3. Manuscripts submitted or in press
4. Summaries of preliminary data
5. Minutes or summaries from patient and/or stakeholder meetings
6. Bibliographies
7. Summaries from Data and Safety Monitoring Board/Committee
8. Final study protocol
9. Other communications efforts
10. Copies of reports from any consultants or advisors, where applicable
11. Other documents or materials, as appropriate
12. Websites, blogs, or other internet-based links
13. Public affairs or popular press coverage of the study online
14. New and continuing IRB approvals

Publications

Action	Publication Number	Title	Status	Progress Report
Edit	PUB-00000133	Publication A		

New Publication

Note: For Engagement Awards, this section will be on Page 5 of the PR.



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Updating & Submitting Progress Reports: Page 7, Cont'd

To add a new publication, enter the publication type, title, name, and publication date on the following page.

Home My Profile

New Publication

Select Publication Record Type

Select a record type for the new publication.

Select Publication Record Type

Record Type of new record

Publication
Presentation
Publication
Scientific Manuscript

Continue

Publication Edit

New Publication

Click Save

Publication Detail

Record Type: Publication

Title: [Text Box]

Publication Type: None

Status: None

Publication Date: 8/30/2016

Progress Report Number: [Text Box]

Publication Information

Name of Publication: [Text Box]

Authors: [Text Box]

URL, if applicable: [Text Box]

Save Save & New Cancel



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Updating & Submitting Progress Reports: Page 8

On **Page 8** of the Progress Report (page 6 for EA), complete Progress Statement for Public Use, Certification and Submit PR for review.

PCORI INTERIM PROGRESS REPORT - RESEARCH AWARDS

Previous Section Quick Save Cancel Submit

PROGRESS STATEMENT FOR PUBLIC USE

Describe notable progress to date, preliminary results, (if applicable) and engagement/stakeholder experiences using nontechnical language that is ready for public use. (Note: This information may be publicly disseminated by PCORI.) (350 character limit)

1 Enter responses to the field under 'Progress Statement for Public Use'

Edit Progress Report



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Updating & Submitting Progress Reports: Page 8, Cont'd.

Both the **PI/PL** and the **PI/PL Designee** can submit the **PR**. If the **PI/PL** submits, they will need to self approve the Progress Report. If the **PI Designee** submits the Progress Report, they will need approval from the **PI**.

CERTIFICATION

After the Submit button is clicked, an approval process will begin within the Approval History section below. This report must be approved by the Principal Investigator and the designated Administrative Official (AO).

Principal Investigator:

By clicking Approve within this report's Approval process, I, as a Principal Investigator, certify that I have reviewed and approved this progress report (and any associated attachments, if applicable), and the information provided is correct.

Paul Ingalls
8/31/2016

Administrative Official:

By clicking Approve within this report's Approval process, I, as an Administrative Official, certify that I have reviewed and approved this progress report (and any associated attachments, if applicable), and the information provided is correct.

Amanda Oliver
8/31/2016

1 **Learning Point**
The Certification page is the final page of the Progress Report.

2 To complete the Progress Report, click 'Submit'

Previous Section Quick Save Cancel Submit

Submit Progress Report



Email Notification: The AO will be notified when the PI/PL approves the Progress Report for their review.



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Questions?

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Thank You

Shevonne Polastre, Senior Systems, Project Manager, IT

James Hulbert, Assistant Director, Financial Compliance

Brett Anderson, PCORI Training Team

Robin Nichols, PCORI Training Team

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