PCORI's New Online Application System

Pre-Award Management

January 23, 2017

pcori

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Welcome!

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Introductions → Focus Group Goals → Training Resources

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Agenda

- Introduction to PCORI Online *(12:00pm – 12:10pm)*
- LOI Submission *(12:10pm – 12:35pm)*
- Application Submission *(12:35pm – 1:05pm)*
- Next Steps and Q&A *(1:05pm – 1:15pm)*

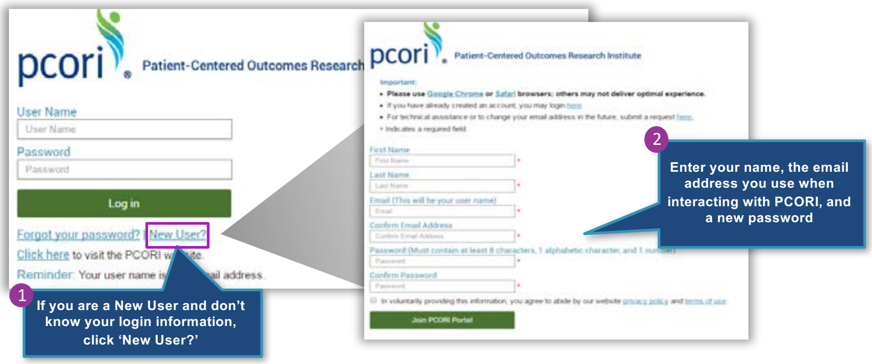
Introduction to PCORI Online

In this section, you will master the following activities:

- Getting Started
- Navigating PCORI Online

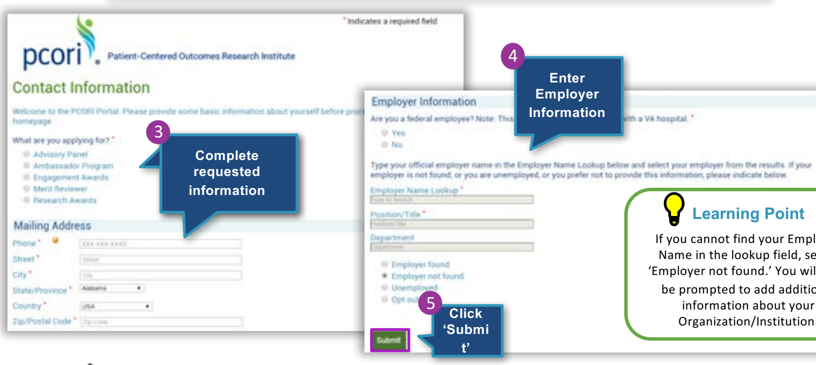
Getting Started: Logging In

Navigate to https://pcori.force.com/engagement to log-in.
If you are a new PCORI Applicant, click on '**New User**' to obtain login information.



Getting Started: Logging In

Complete the requested fields, including **contact information**, **demographic information**, and **employer information**.



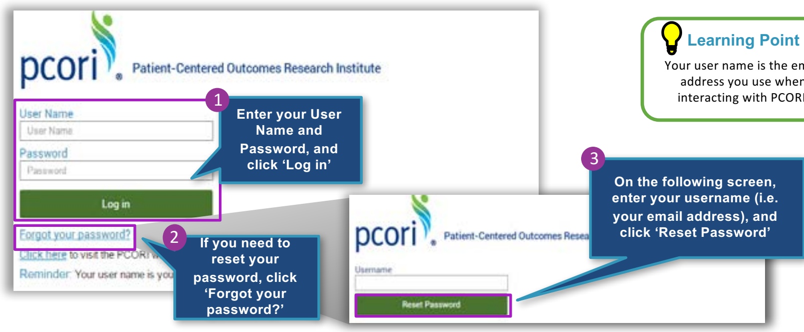
Learning Point

If you cannot find your Employer Name in the lookup field, select 'Employer not found.' You will then be prompted to add additional information about your Organization/Institution.

Email Notification: Once you complete the New User Form, you will receive an email welcoming you to the portal with a link to log-in.

Getting Started: Logging In

If you have previously logged in to the new PCORI Online, enter your **User Name** and **Password** to get started.



Learning Point

Your user name is the email address you use when interacting with PCORI.

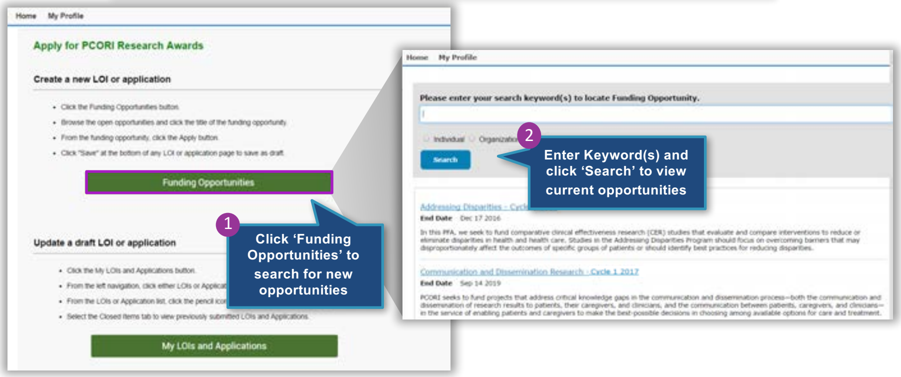
Email Notification: After selecting 'Reset Password,' you will receive a system-generated email with instructions on how to update your password.

Navigating PCORI Online: Home Screen

The home screen allows you to **apply for awards** and **access multiple PCORI award management features**.

Navigating PCORI Online: Search for Funding Opportunities

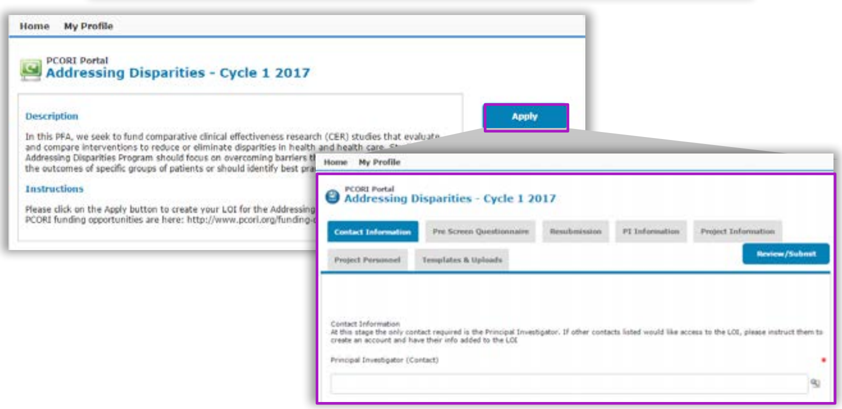
To create a **new LOI** or **Application**, get started by searching for PCORI Funding Opportunities through the new PCORI Online.



Note: You can also continue to search for opportunities through the PCORI website. For further instruction, navigate to the Appendix.

Navigating PCORI Online: Search for Funding Opportunities, Cont'd

Once you have selected a PCORI funding opportunity, click '**Apply**' to begin a **Letter of Intent (LOI)**.



To recap, we've reviewed the following activities:

- Getting Started
- Navigating PCORI Online

Live Demonstration!

LOI Submission

In this section, you will master the following activities:

- Introduction to LOI Submission
- Complete & Submit a Letter of Intent (LOI)

LOI & Application Submission: Process Flow

Applicant

1 LOI Submission: PI/PI Designee

- Applying for funding from PCORI is a two-stage process; a LOI must be submitted before an organization is invited to submit a full Application.

PCORI Staff

2 LOI Review: PCORI Staff

- Committees of PCORI staff screen the LOIs based on the criteria outlined in the PCORI Funding Announcement (PFA).

Applicant

3 App. Submission: PI/PI Designee

- If the organization is invited to continue in the application process, the next step will be to complete the full Application.
- A draft Application will be created in PCORI Online based on the initial LOI.

4 App. Review: Admin. Official

- The Administrative Official (AO) will review the Application.
- The AO will either submit the final Application to PCORI, or return it to the PI/PI Designee for revisions.

PCORI Staff

5 App. Review: PCORI Staff

- PCORI staff will review the Application for administrative compliance and responsiveness to the PFA.
- If compliant, the Application may then proceed to Merit Review.

During this process, PCORI Staff can send the Applicant a **PCORI Information Request (PIR)** through PCORI Online. The PIR typically will contain a list of questions regarding an Application, requesting the Applicant to upload additional information by a given deadline.

Note: For more information on the Application and Merit Review process, navigate to the PCORI Funding Opportunities page.

Introduction to LOI Submission: Process Flow

Applicant

1 LOI Submission: PI/PI Designee

- Applying for funding from PCORI is a two-stage process; a LOI must be submitted before an organization is invited to submit a full Application.

PCORI Staff

2 LOI Review: PCORI Staff

- Committees of PCORI staff screen the LOIs based on the criteria outlined in the PCORI Funding Announcement (PFA).

Applicant

3 App. Submission: PI/PI Designee

- If the organization is invited to continue in the application process, the next step will be to complete the full Application.
- A draft Application will be created in PCORI Online based on the initial LOI.

4 App. Review: Admin. Official

- The Administrative Official (AO) will review the Application.
- The AO will either submit the final Application to PCORI, or return it to the PI/PI Designee for revisions.

PCORI Staff

5 App. Review: PCORI Staff

- PCORI staff will review the Application for administrative compliance and responsiveness to the PFA.
- If compliant, the Application may then proceed to Merit Review.

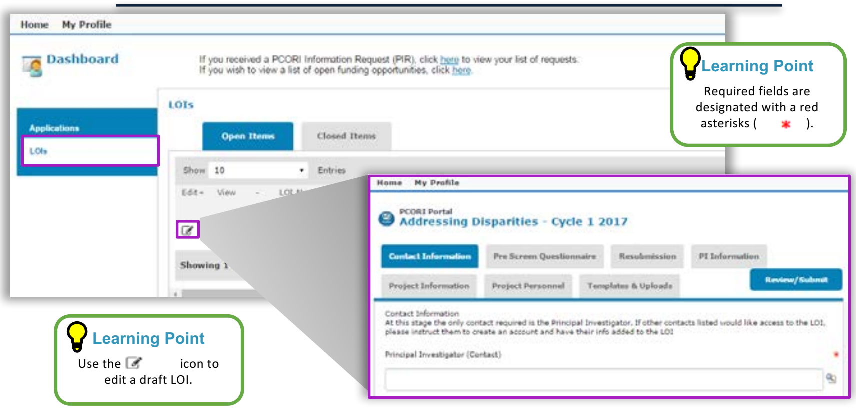
Introduction to LOI Submission: Navigation

At the top of the LOI, you will find the following **tabs** which will assist with navigating the various sections of the form.

LOI Tabs		
Contact Information	Add basic contact information for the Organization/ Institution, including the PI, AO, and any Designees.	Contact Information
Pre Screen Questionnaire	Respond to initial screening questions.	Pre Screen Questionnaire
Resubmission	Indicate whether the organization is resubmitting a previous Application, or has been invited to resubmit an Application from a previous cycle.	Resubmission
PI Information	Enter detailed information about the PI's experience with research and grants management.	PI Information
Project Information	Provide relevant project information, including the focus disease or condition, projected costs, target populations, and analytic methods.	Project Information
Project Personnel	Add the names of Project Personnel who will make up the Awardee Project team.	Project Personnel
Templates & Uploads	Download any applicable templates, and upload attachments to include with the Application.	Templates & Uploads

Complete & Submit a Letter of Intent (LOI)

From the LOI & Application Dashboard, navigate to a **new** or **draft Letter of Intent (LOI)** for a PCORI funding opportunity.



Learning Point

Required fields are designated with a red asterisks (*).

Learning Point

Use the icon to edit a draft LOI.

Complete & Submit a LOI: Submitted

Applicant	PCORI Staff	Applicant		PCORI Staff
1 LOI Submission: PI/PI Designee	2 LOI Review: PCORI Staff	3 App. Submission: PI/PI Designee	4 App. Review: Admin. Official	5 App. Review: PCORI Staff
• Applying for funding from PCORI is a two-stage process; a LOI must be submitted before an organization is invited to submit a full Application.	• Committees of PCORI staff screen the LOIs based on the criteria outlined in the PCORI Funding Announcement (PFA).	• If the organization is invited to continue in the application process, the next step will be to complete the full Application. • A draft Application will be created in PCORI Online based on the initial LOI.	• The Administrative Official (AO) will review the Application. • The AO will either submit the final Application to PCORI, or return it to the PI/PI Designee for revisions.	• PCORI staff will review the Application for administrative compliance and responsiveness to the PFA. • If compliant, the Application may then proceed to Merit Review.

Email Notification: If invited to continue in the application process, the applicant will receive an email notification with instructions to proceed with submitting the full Application.

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To recap, we've reviewed the following activities:

- Introduction to LOI Submission
- Complete & Submit a Letter of Intent (LOI)

Live Demonstration!

Application Submission

In this section, you will master the following activities:

- Introduction to Application Submission
- Complete & Submit the Application

Introduction to Application Submission: Process Flow

Applicant

1 LOI Submission: PI/PI Designee

- Applying for funding from PCORI is a two-stage process; a LOI must be submitted before an organization is invited to submit a full Application.

PCORI Staff

2 LOI Review: PCORI Staff

- Committees of PCORI staff screen the LOIs based on the criteria outlined in the PCORI Funding Announcement (PFA).

Applicant

3 App. Submission: PI/PI Designee

- If the organization is invited to continue in the application process, the next step will be to complete the full Application.
- A draft Application will be created in PCORI Online based on the initial LOI.

4 App. Review: Admin. Official

- The Administrative Official (AO) will review the Application.
- The AO will either submit the final Application to PCORI, or return it to the PI/PI Designee for revisions.

PCORI Staff

5 App. Review: PCORI Staff

- PCORI staff will review the Application for administrative compliance and responsiveness to the PFA.
- If compliant, the Application may then proceed to Merit Review.

Introduction to Application Submission: Navigation

At the top of the Application, you will find the following **tabs** which will assist with navigating the various sections of the form.

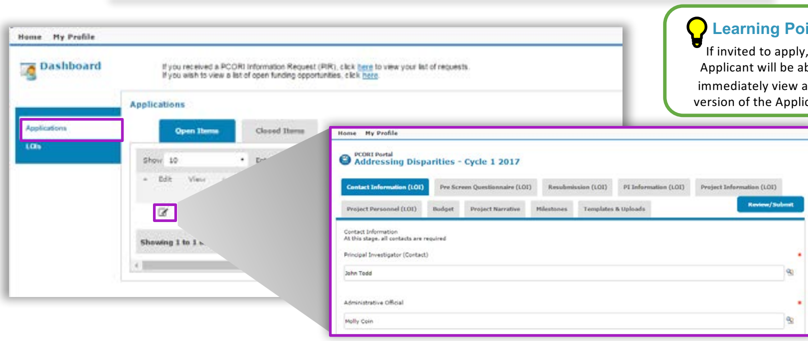
Application Tabs		
Contact Information (LOI)	Add basic contact information for the Organization/ Institution, including the PI, AO, and any Designees.	Contact Information
Pre Screen Questionnaire (LOI)	Respond to initial screening questions.	Pre Screen Questionnaire
Resubmission (LOI)	Indicate whether the organization is resubmitting a previous Application, or has been invited to resubmit an Application from a previous cycle.	Resubmission
PI Information (LOI)	Enter detailed information about the PI's experience with research and grants management.	PI Information
Project Information (LOI)	Provide relevant project information, including the focus disease or condition, projected costs, target populations, and analytic methods.	Project Information
Project Personnel (LOI)	Add the names of Project Personnel who will make up the Awardee Project team.	Project Personnel
Budget	Provide details related to the budget of the project.	Budget
Project Narratives	Provide more detail regarding your proposed research, including abstracts, narratives, and goals.	Project Narratives
Milestones	List concrete, specific events or accomplishments that will be documented as contractual tasks of your project.	Milestones
Templates & Uploads	Download any applicable templates, and upload attachments to include with the Application.	Templates & Uploads

Learning Point

The first six tabs have been pre-populated from the LOI submission, and are designated **(LOI)**.

Complete the Application

If the Letter of Intent (LOI) has been reviewed and the **organization is invited** to continue in the application process, the next step will be to navigate to the LOI & Application Dashboard to **complete the full Application**.



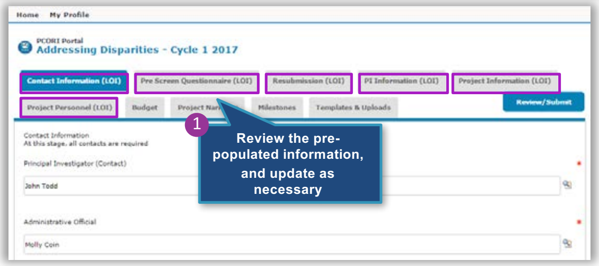
Learning Point

If invited to apply, the Applicant will be able to immediately view a draft version of the Application.

Email Notification: If invited to continue in the application process, the applicant will receive an email notification with instructions to proceed with submitting the full Application.

Complete the Application: Review Pre-Populated Tabs

Before adding any new information, **review the first six tabs** that have been pre-populated from the LOI.

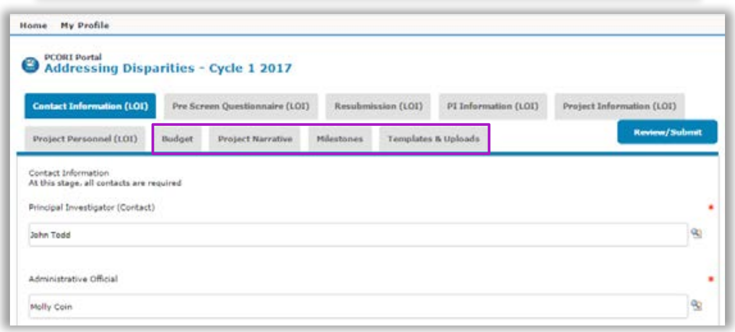


Please note that any changes to the following information completed in the LOI submission will require PCORI's written approval prior to Application submission:

- Principal Investigator
- Institution
- Study design
- Research question(s)
- Specific aims
- Comparators

Complete the Application: Proceed to Additional Tabs

The following four tabs will request additional information not included on the LOI. These tabs include **Budget**, **Project Narratives**, **Milestones**, and **additional Templates & Uploads**.



Complete the Application: Budget

Once you click on the **Budget tab**, you will navigate through the following **eleven budget pages** to input information related to the yearly costs for your project. The first ten pages require input and the final page will provide a summary.

Budget Page	Information Requested (Per Year)
Personnel*	For each project personnel, list the name, role, employment information, and salary details.
Consultant Cost*	If applicable, indicate consultant cost including hourly/unit rate and total cost.
Supplies	List all supplies and cost per supply.
Scientific Travel	Specify the details and costs of any scientific travel that will occur.
Programmatic Travel	Specify the details and costs of any programmatic travel that will occur.
Other Expenses	Provide details and costs for any additional expenses.
Equipment	List all equipment and cost per equipment.
Subcontractor Direct Costs*	Provide subcontractor names and total costs per year.
Subcontractor Indirect Costs*	Provide subcontractor name and total indirect costs per year.
Detailed Budget – Total Indirect Costs*	Indicate total prime indirect costs and annual rate per year.
Budget Summary	Review summary of all budget information before proceeding to Project Narratives Tab.

Note: Each page will allow you to edit up to 5 years. Additionally, pages indicated above by an asterisk (*) include a Peer Review Period (Year 6).

Complete & Submit the Application: Submitted

Applicant

1 LOI Submission: PI/PI Designee

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PCORI Staff

2 LOI Review: PCORI Staff

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Applicant

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PCORI Staff

5 App. Review: PCORI Staff

- PCORI staff will review the Application for administrative compliance and responsiveness to the PFA.

Introduction to PIR: Process Flow

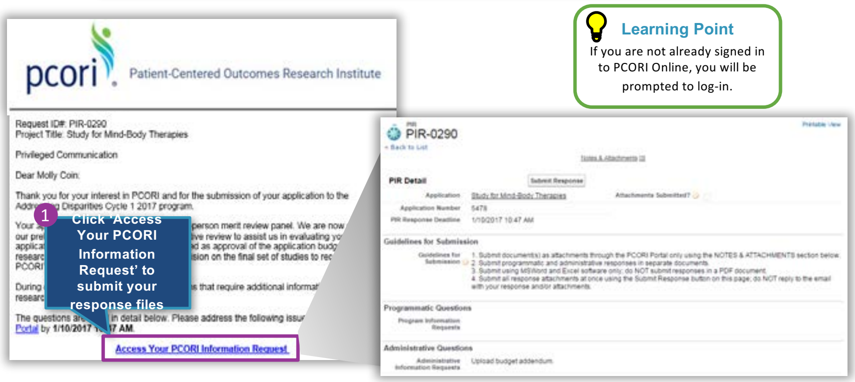
Applicant	PCORI Staff	Applicant		PCORI Staff
1 LOI Submission: PI/PI Designee	2 LOI Review: PCORI Staff	3 App. Submission: PI/PI Designee	4 App. Review: Admin. Official	5 App. Review: PCORI Staff
• Applying for funding from PCORI is a two-stage process; a LOI must be submitted before an organization is invited to submit a full Application.	• Committees of PCORI staff screen the LOIs based on the criteria outlined in the PCORI Funding Announcement (PFA).	• If the organization is invited to continue in the application process, the next step will be to complete the full Application. • A draft Application will be created in PCORI Online based on the initial LOI.	• The Administrative Official (AO) will review the Application. • The AO will either submit the final Application to PCORI, or return it to the PI/PI Designee for revisions.	• PCORI staff will review the Application for administrative compliance and responsiveness to the PFA. • If compliant, the Application may then proceed to Merit Review.

During this process, PCORI Staff can send the Applicant a **PCORI Information Request (PIR)** through PCORI Online. The PIR typically will contain a list of questions regarding an Application, requesting the Applicant to upload additional information by a given deadline.

Introduction to PIR: Navigate through PIR Letter

If PCORI has requested additional information regarding your project, you will receive a **PCORI Information Request (PIR)** notification via email. **Navigate to the email**, review the details, and follow to the link to PCORI Online.

Learning Point
If you are not already signed in to PCORI Online, you will be prompted to log-in.



Note: If you are not automatically directed to the PIR record after logging in, then return to the email and click the link again in Step 1.

To recap, we've reviewed the following activities:

- Introduction to Application Submission
- Complete & Submit the Application

Live Demonstration!

Next Steps & Additional Resources

In this section, we will discuss the following:

- 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 the Appendix:

- Key Terminology
- Update User Profile Settings
- Search for Funding Opportunities through PCORI.org
- Additional Navigation

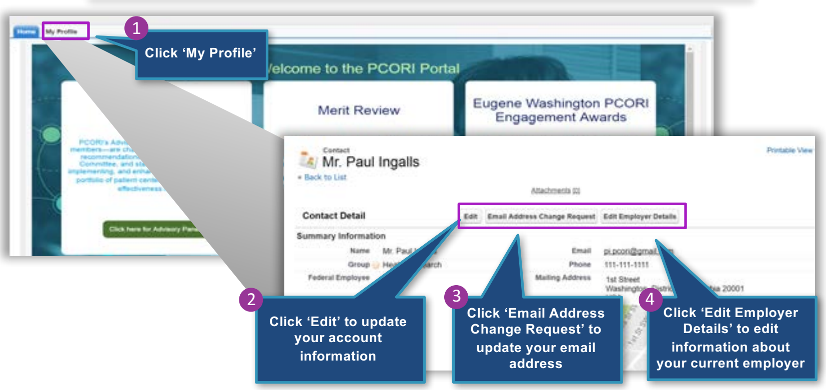
Key Terminology

The following **key terminology** will be used throughout training, and will be useful while interacting with PCORI Online.

System Launch	January 17, 2017: PFAs released on or after this date will be available in the new PCORI Online for Applicants to submit LOIs & Applications
Portal User	General term to refer to any current or past Applicant or Awardee user of PCORI Online
PCORI Staff	General term to refer to any PCORI Staff user in the system
System Administrator	PCORI IT members tasked with providing technical and administrative support for PCORI Online
Idle Time	If you are idle for more than 2 hours, you will be automatically logged out and will need to re-enter your username and password to login again

Update User Profile Settings: My Profile

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



Update User Profile Settings: My Settings

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

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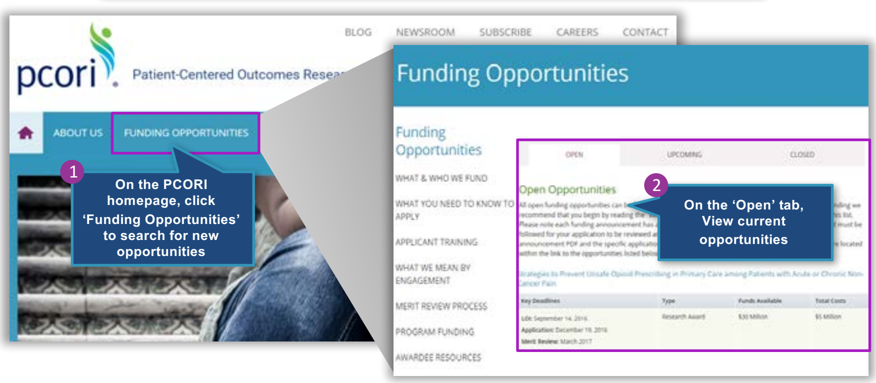
Search for Funding Opportunities through PCORI.org

You can continue to **search for PCORI Funding Opportunities** through the **PCORI website** (www.pcori.org).



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Search for Funding Opportunities through PCORI.org, Cont'd

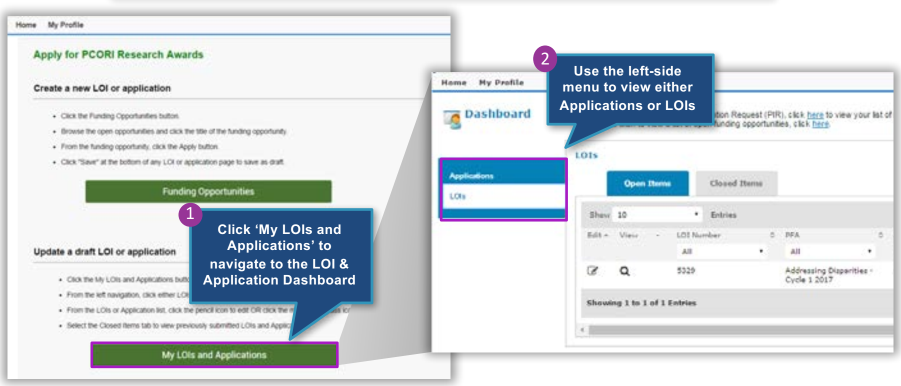
Once you **select the opportunity** to which you will apply, you will **log-in to PCORI Online** and click 'Apply.'

Learning Point

After Step 3, you will be prompted to log-in to PCORI Online before proceeding with the LOI.

Navigation: View/Update Existing LOIs and Applications

You can also navigate to **existing LOIs and Applications** through the LOI & Application Dashboard.



Note: Before beginning your first LOI or Application, you will not see any items on the Dashboard.

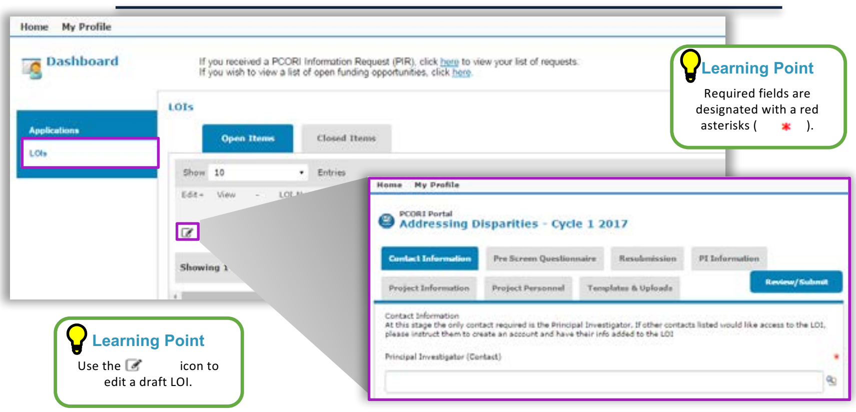
Appendix B

The following topics are included in the Appendix:

- LOI Submission

Complete & Submit a Letter of Intent (LOI)

From the LOI & Application Dashboard, navigate to a **new** or **draft Letter of Intent (LOI)** for a PCORI funding opportunity.

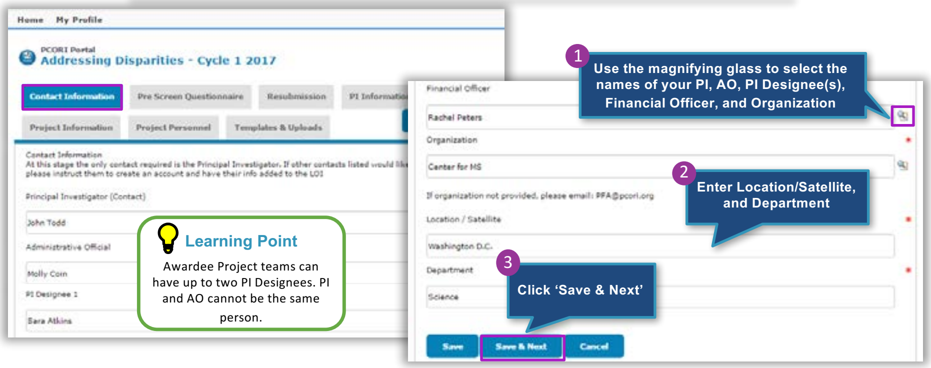


Learning Point
Required fields are designated with a red asterisks (*).

Learning Point
Use the icon to edit a draft LOI.

Complete & Submit a LOI: Contact Information

On the **Contact Information tab**, add basic contact information for the Organization/Institution.



Learning Point

Awardee Project teams can have up to two PI Designees. PI and AO cannot be the same person.

Note: Only Project Personnel with active PCORI Online accounts will appear in the magnifying glass search results.
Team members that do not appear will need to create an account. For instructions, click here.

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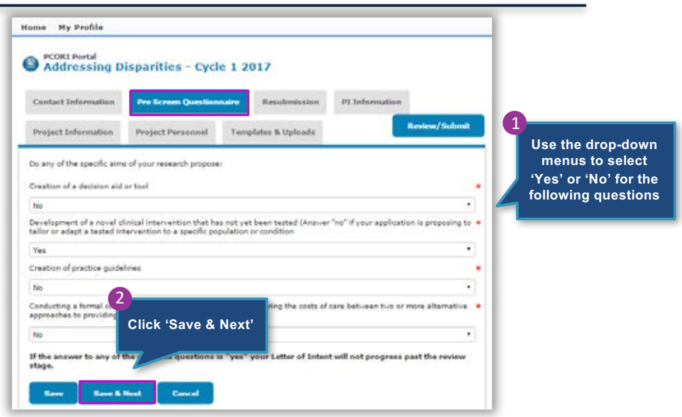
Complete & Submit a LOI: Pre Screen Questionnaire

On the **Pre Screen Questionnaire tab**, respond to initial screening questions.

STOP!

If you answer 'Yes' to any of these questions, your LOI will not progress past the review stage. **We recommend you discontinue your LOI submission for this PFA.**



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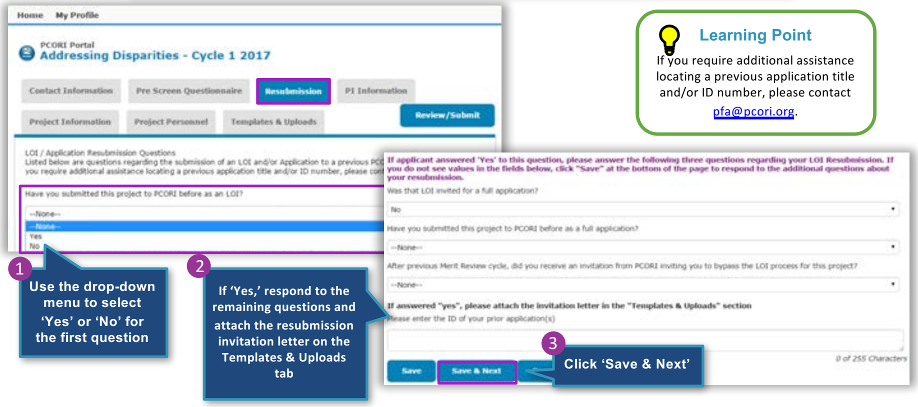
Complete & Submit a LOI: Resubmission

On the **Resubmission tab**, indicate whether you are resubmitting a previous Application, or have been invited to resubmit an Application from a previous cycle.

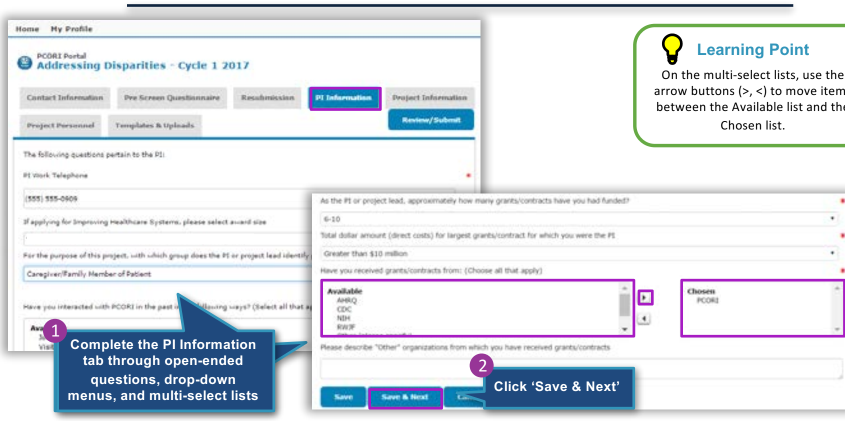


Learning Point

If you require additional assistance locating a previous application title and/or ID number, please contact pfa@pcori.org.

Complete & Submit a LOI: PI Information

On the **PI Information tab**, enter detailed information about the PI's experience with research and grants management.

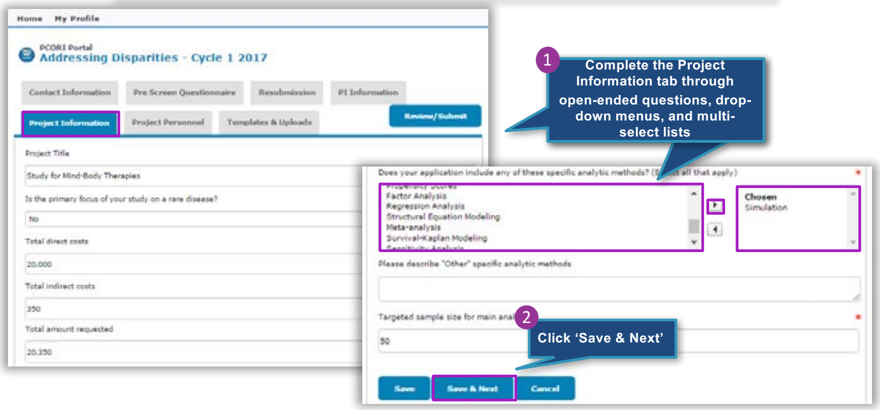


Learning Point

On the multi-select lists, use the arrow buttons (>, <) to move items between the Available list and the Chosen list.

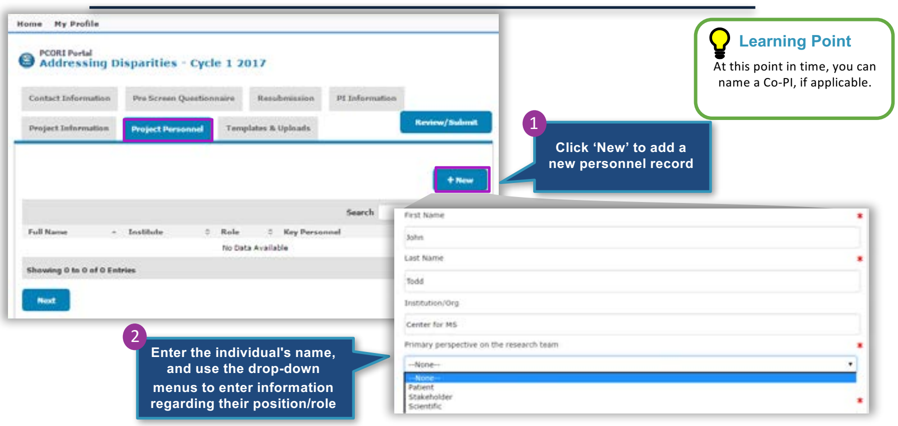
Complete & Submit a LOI: Project Information

On the **Project Information tab**, provide relevant project information, including the focus disease or condition, projected costs, target populations, and analytic methods.



Complete & Submit a LOI: Project Personnel

On the **Project Personnel tab**, add the names of the Project Personnel who will make up the Awardee Project team.



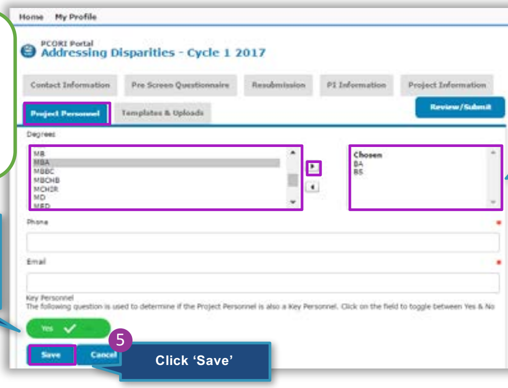
Complete & Submit a LOI: Project Personnel, Cont’d

Complete the **Project Personnel form** to add them to the list of the Project Personnel, indicating the individual as ‘Key Personnel,’ if applicable.

Learning Point

Key Personnel typically includes the PI, Co-PIs and sometimes PI Designees.

This designation requires PCORI agreement before it can be changed.



3 Complete the remaining fields through open-ended questions, drop-down menus, and multi-select lists

4 Check ‘Yes’ or ‘No’ for Key Personnel

5 Click ‘Save’

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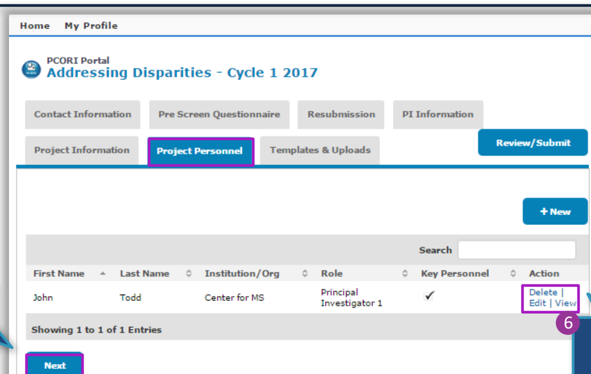
Complete & Submit a LOI: Project Personnel, Cont’d

Add **additional Project Personnel**, edit **existing Personnel Records**, or continue on to the **next tab** of the LOI.



7 Click ‘Next’ to navigate to the next tab

6 Navigate to the Action column to ‘Delete,’ ‘Edit,’ or ‘View’ existing records

Note: Add additional Project Personnel by clicking ‘**New**’ again, and repeating steps 1-5.

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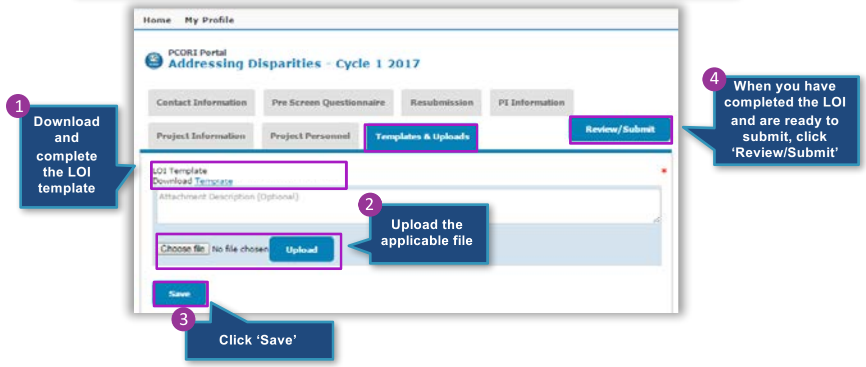
Complete & Submit a LOI: Templates & Uploads

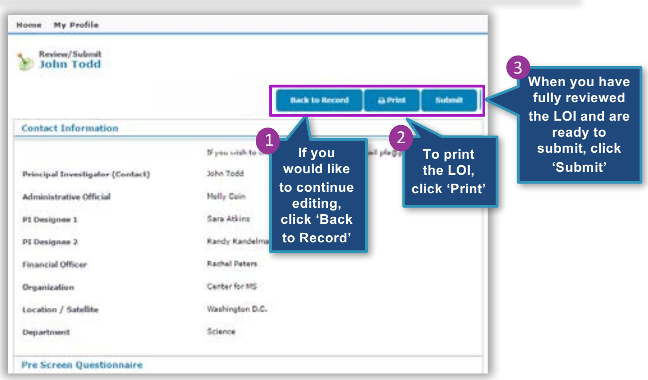
On the **Templates & Uploads tab**, download any applicable templates, and upload attachments to include with the LOI.



Note: If you have been invited by PCORI to resubmit, upload the **Letter of Invitation** in place of the LOI template.

Complete & Submit a LOI: Review and Submit

Once you click 'Review/Submit,' you will be taken to a **read-only view** of the LOI for final review and submission.



Learning Point
If you wish to withdraw your LOI once submitted, please email pfa@pcori.org.

Email Notification: Upon submission, the Applicant will receive an email confirmation.

Appendix C

The following topics are included in the Appendix:

- Application Submission and Approval

Introduction to Application Submission: Navigation

At the top of the Application, you will find the following **tabs** which will assist with navigating the various sections of the form.

Learning Point

The first six tabs have been pre-populated from the LOI submission, and are designated **(LOI)**.

Application Tabs		
Contact Information (LOI)	Add basic contact information for the Organization/ Institution, including the PI, AO, and any Designees.	Contact Information
Pre Screen Questionnaire (LOI)	Respond to initial screening questions.	Pre Screen Questionnaire
Resubmission (LOI)	Indicate whether the organization is resubmitting a previous Application, or has been invited to resubmit an Application from a previous cycle.	Resubmission
PI Information (LOI)	Enter detailed information about the PI's experience with research and grants management.	PI Information
Project Information (LOI)	Provide relevant project information, including the focus disease or condition, projected costs, target populations, and analytic methods.	Project Information
Project Personnel (LOI)	Add the names of Project Personnel who will make up the Awardee Project team.	Project Personnel
Budget	Provide details related to the budget of the project.	Budget
Project Narratives	Provide more detail regarding your proposed research, including abstracts, narratives, and goals.	Project Narratives
Milestones	List concrete, specific events or accomplishments that will be documented as contractual tasks of your project.	Milestones
Templates & Uploads	Download any applicable templates, and upload attachments to include with the Application.	Templates & Uploads

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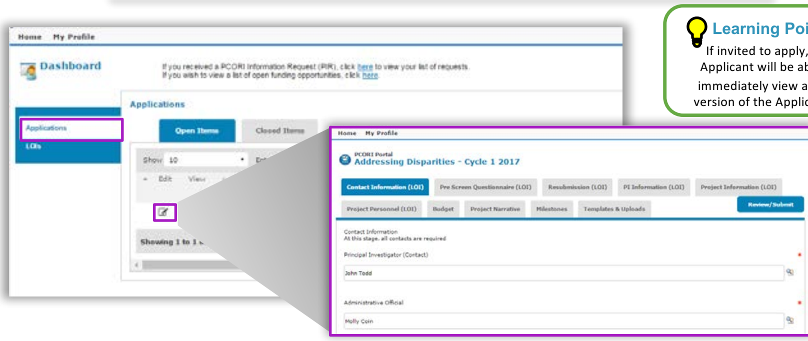
Complete the Application

If the Letter of Intent (LOI) has been reviewed and the **organization is invited** to continue in the application process, the next step will be to navigate to the LOI & Application Dashboard to **complete the full Application**.

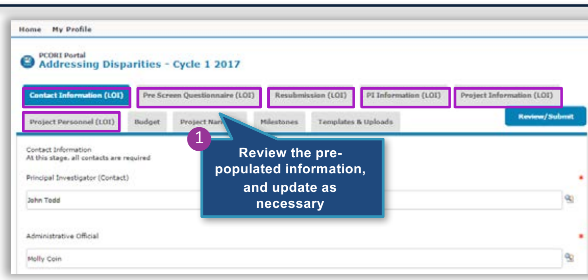


Learning Point
If invited to apply, the Applicant will be able to immediately view a draft version of the Application.

Email Notification: If invited to continue in the application process, the applicant will receive an email notification with instructions to proceed with submitting the full Application.

Complete the Application: Review Pre-Populated Tabs

Before adding any new information, **review the first six tabs** that have been pre-populated from the LOI.

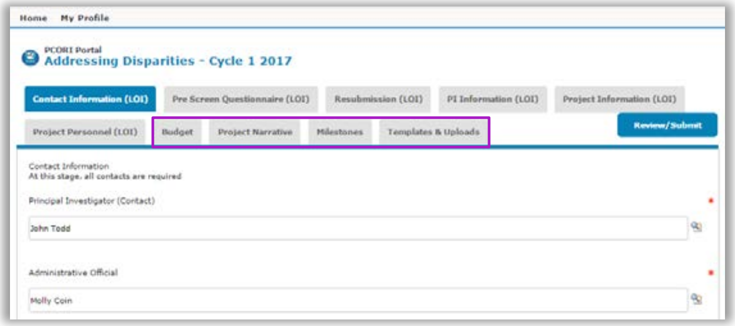


Please note that any changes to the following information completed in the LOI submission will require PCORI's written approval prior to Application submission:

- Principal Investigator
- Institution
- Study design
- Research question(s)
- Specific aims
- Comparators

Complete the Application: Proceed to Additional Tabs

The following four tabs will request additional information not included on the LOI. These tabs include **Budget**, **Project Narratives**, **Milestones**, and **additional Templates & Uploads**.



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Complete the Application: Budget

Once you click on the **Budget tab**, you will navigate through the following **eleven budget pages** to input information related to the yearly costs for your project. The first ten pages require input and the final page will provide a summary.

Budget Page	Information Requested (Per Year)
Personnel*	For each project personnel, list the name, role, employment information, and salary details.
Consultant Cost*	If applicable, indicate consultant cost including hourly/unit rate and total cost.
Supplies	List all supplies and cost per supply.
Scientific Travel	Specify the details and costs of any scientific travel that will occur.
Programmatic Travel	Specify the details and costs of any programmatic travel that will occur.
Other Expenses	Provide details and costs for any additional expenses.
Equipment	List all equipment and cost per equipment.
Subcontractor Direct Costs*	Provide subcontractor names and total costs per year.
Subcontractor Indirect Costs*	Provide subcontractor name and total indirect costs per year.
Detailed Budget – Total Indirect Costs*	Indicate total prime indirect costs and annual rate per year.
Budget Summary	Review summary of all budget information before proceeding to Project Narratives Tab.

Note: Each page will allow you to edit up to 5 years. Additionally, pages indicated above by an asterisk (*) include a Peer Review Period (Year 6).

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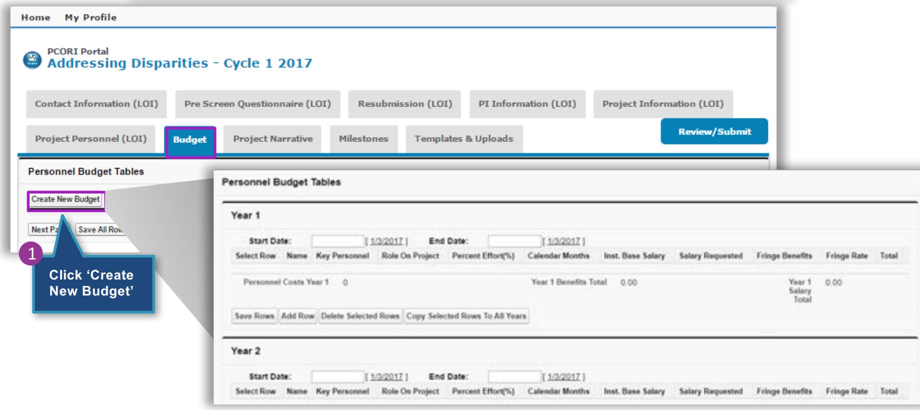
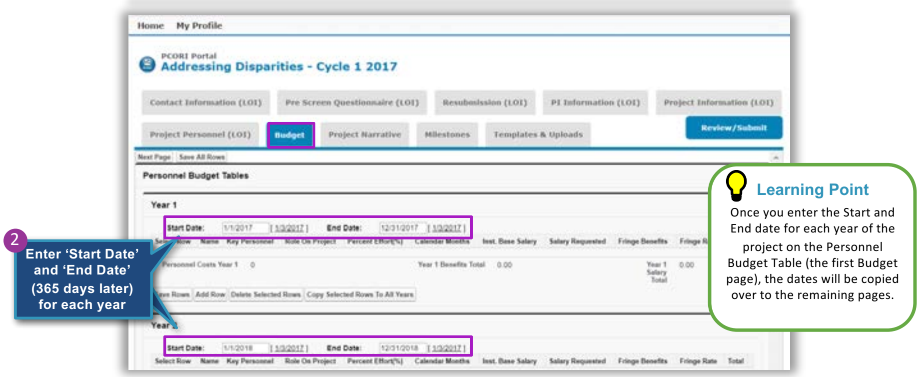
Complete the Application: Budget, Cont'd

To begin editing Budget Tables, click '**Create New Budget**' which will open the first page, **Personnel Budget Tables**.



Complete the Application: Budget, Cont'd

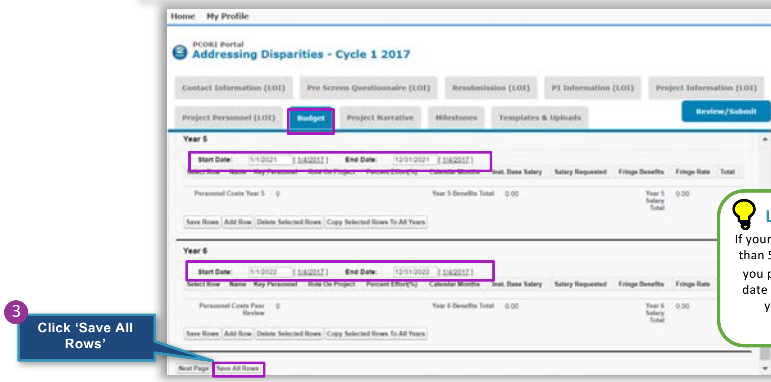
To start editing the Personnel Budget, begin by entering the '**Start Date**' and '**End Date**' for each year.



Note: Year 1 'Start Date' should not be prior to the Earliest Start Date listed in the PFA.

Complete the Application: Budget, Cont'd

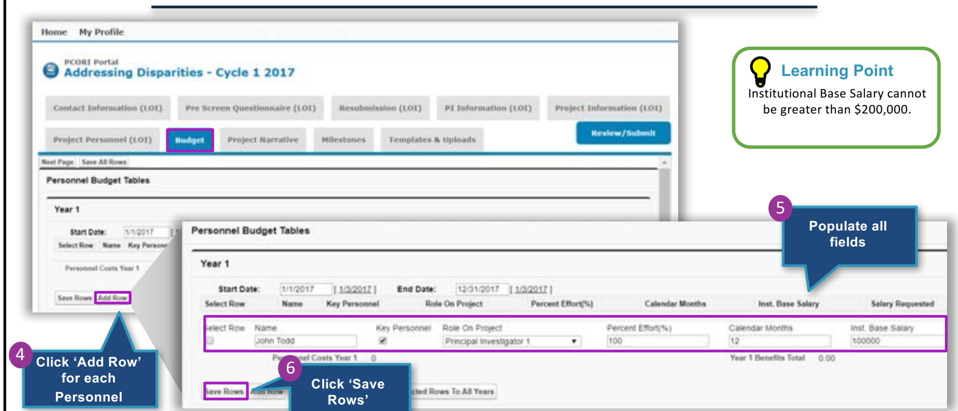
Even if your proposed project is less than 5 years, you must populate a date value for the '**Start Date**' and '**End Date**' fields for all years. Once complete, click '**Save All Rows**.'



Learning Point
If your proposed project is less than 5 years, we recommend you populate the remaining date fields with consecutive years (as displayed).

Complete the Application: Budget, Cont'd

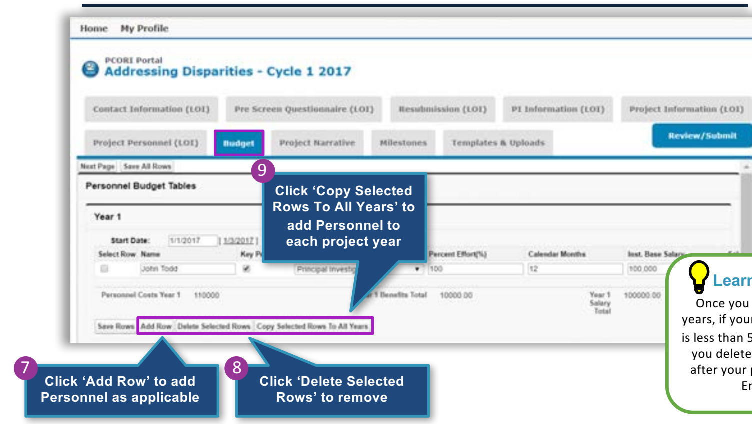
Add a row to enter budget details related to the first personnel. Click '**Save Rows**' when done editing each row.



Learning Point
Institutional Base Salary cannot be greater than $200,000.

Complete the Application: Budget, Cont'd

Continue to add additional personnel for Year 1. To copy these personnel details across all remaining years, select the applicable rows and click '**Copy Selected Rows to All Years**.'

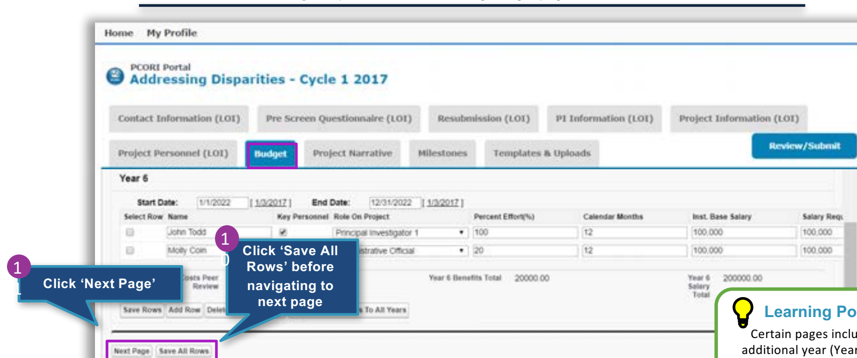


Learning Point

Once you copy rows to all years, if your proposed project is less than 5 years ensure that you delete the copied rows after your proposed project End Date.

Complete the Application: Budget, Cont'd

Once you have completed each year of your proposed project on the Personnel page, click '**Save All Rows**.' Then click '**Next Page**' to proceed to the following Budget page, Consultant Cost.



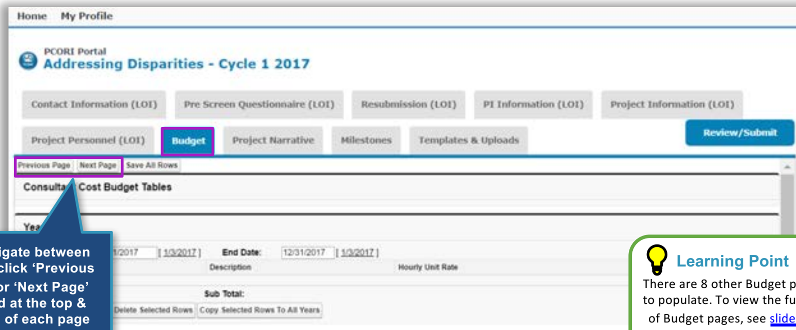
Learning Point

Certain pages include an additional year (Year 6) as a Peer Review Period.

Note: You do not need to add budget rows to years after your proposed project end date.

Complete the Application: Budget, Cont'd

Update the remaining Budget pages following the previous steps 2-10. Navigate between pages after saving all rows using the '**Previous Page**' and '**Next Page**' buttons.



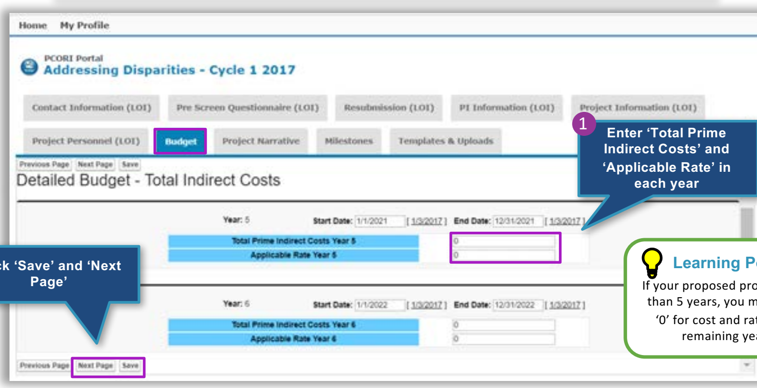
1 To navigate between pages, click 'Previous Page' or 'Next Page' located at the top & bottom of each page

Learning Point
There are 8 other Budget pages to populate. To view the full list of Budget pages, see slide 39.

Note: If you edit the Start & End dates on any page, those changes will be reflected on all pages.

Complete the Application: Budget, Cont'd

Note that the **Detailed Budget – Total Indirect Costs** page has a different format. Populate the requested values in each year.



1 Enter 'Total Prime Indirect Costs' and 'Applicable Rate' in each year

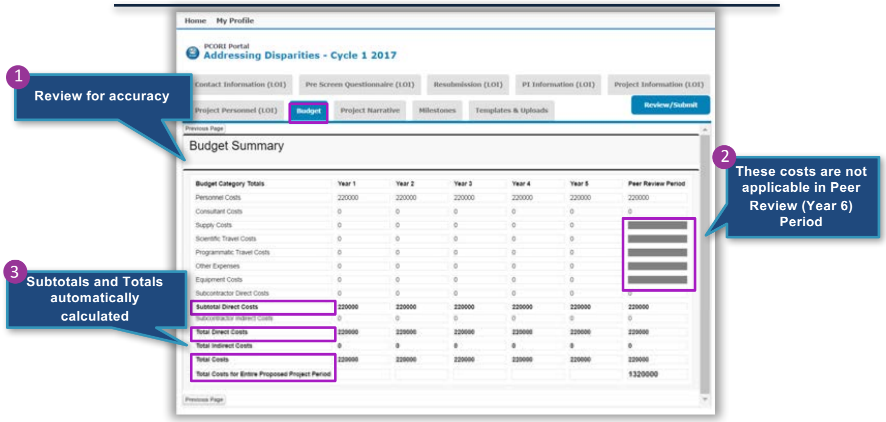
2 Click 'Save' and 'Next Page'

Learning Point
If your proposed project is less than 5 years, you must enter '0' for cost and rate for all remaining years.

Note: If you do not click 'Save,' information on this page will not be saved to the Budget Summary page.

Complete the Application: Budget, Cont'd

Once you have completed all Budget pages, the last page will provide a **Budget Summary**.



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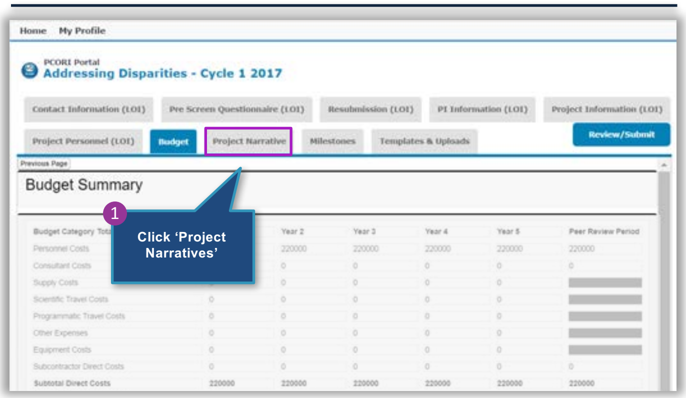
Complete the Application: Budget, Cont'd

When you have finished reviewing your budget information and are ready to proceed, click the '**Project Narratives**' tab.



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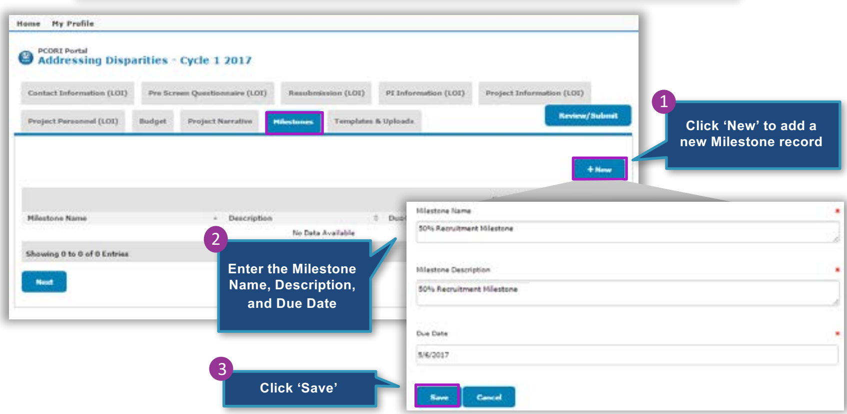
Complete the Application: Project Narratives

On the **Project Narratives tab**, provide more detail regarding your proposed research, including abstracts, narratives, and goals.

Learning Point
The Projected Start and End Date should match the dates listed in the Budget pages.

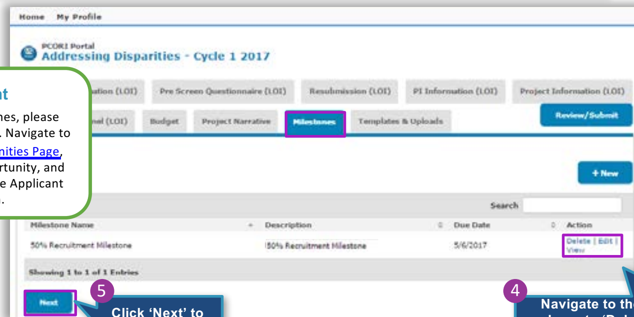
Complete the Application: Milestones

On the **Milestones tab**, list concrete, specific events or accomplishments that will be documented as contractual tasks of the project.



Complete the Application: Milestones, Cont'd

Add **additional Milestones**, edit **existing Milestone Records**, or continue on to the **next tab** of the Application.



Learning Point
For a list of sample milestones, please reference the PFA Guidelines. Navigate to the PCORI Funding Opportunities Page, click on the applicable Opportunity, and find the Guidelines under the Applicant Resources section.

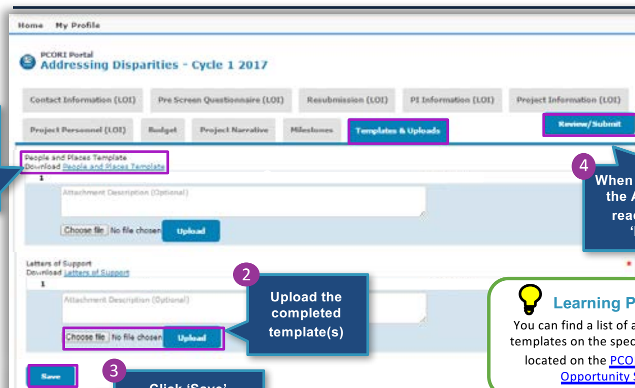
5 Click 'Next' to navigate to the next tab

4 Navigate to the Action column to 'Delete,' 'Edit,' or 'View' existing Milestones

Note: Add additional Milestones by clicking '**New**' again, and repeating steps 1-3.

Complete the Application: Templates & Uploads

On the **Templates & Uploads tab**, download any applicable templates, and upload attachments to include with the Application.



1 Download and complete any applicable Application template(s)

2 Upload the completed template(s)

3 Click 'Save'

4 When you have completed the Application and are ready to submit, click 'Review/Submit'

Learning Point
You can find a list of all applicable templates on the specific PFA page located on the PCORI Funding Opportunity Site.

Complete the Application: Review and Submit for AO Approval

Once you click 'Review/Submit,' you will be taken to a **read-only view** of the Application for final review prior to submitting to the Administrative Official (AO) for approval. After clicking '**Submit**', the Application is locked for editing pending AO review.

Email Notification: Upon submission, the Applicant will receive an email confirmation that the Application has been sent to the AO for approval.

Complete the Application: AO Approval

Applicant

1 LOI Submission: PI/PI Designee
- Applying for funding from PCORI is a two-stage process; a LOI must be submitted before an organization is invited to submit a full Application.

PCORI Staff

2 LOI Review: PCORI Staff
- Committees of PCORI staff screen the LOIs based on the criteria outlined in the PCORI Funding Announcement (PFA).

Applicant

3 App. Submission: PI/PI Designee
- If the organization is invited to continue in the application process, the next step will be to complete the full Application.
- A draft Application will be created in PCORI Online based on the initial LOI.

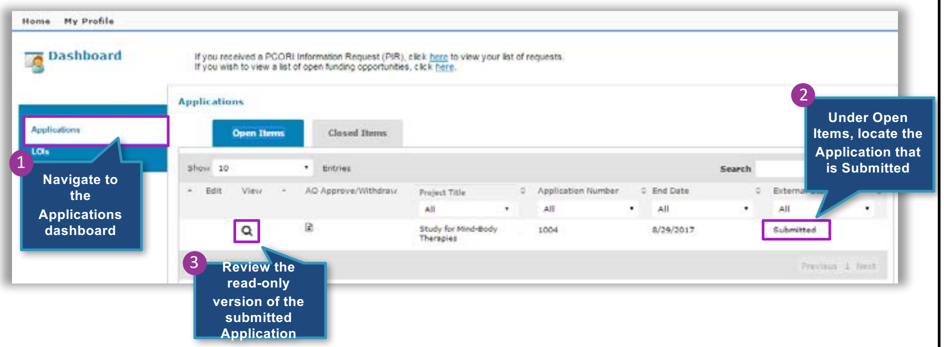
4 App. Review: Admin. Official
- The Administrative Official (AO) will review the Application.
- The AO will either submit the final Application to PCORI, or return it to the PI/PI Designee for revisions.

PCORI Staff

5 App. Review: PCORI Staff
- PCORI staff will review the Application for administrative compliance and responsiveness to the PFA.
- If compliant, the Application may then proceed to Merit Review.

Complete the Application: AO Approval, Cont'd

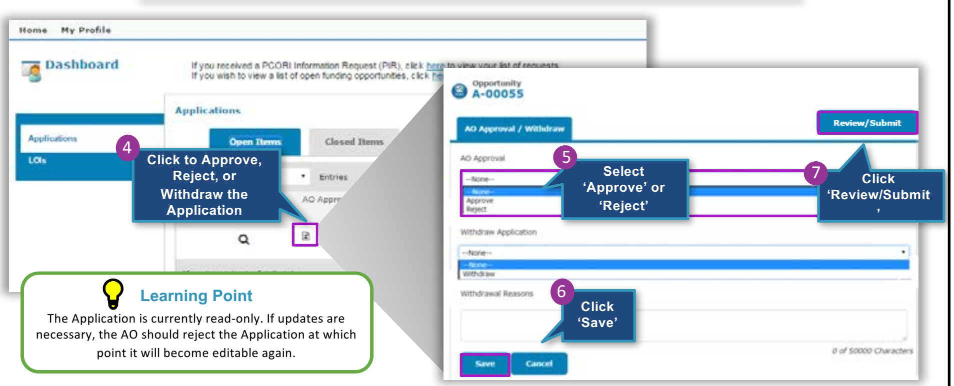
Once the Application is submitted for internal approval, the Administrative Official (AO) can **navigate to PCORI Online** to review the Application.



Note: Once it's submitted to the AO for approval, all members of the Awardee Team will still be able to access the read-only view of the Application through the LOI & Application Dashboard.

Complete the Application: AO Approval, Cont'd

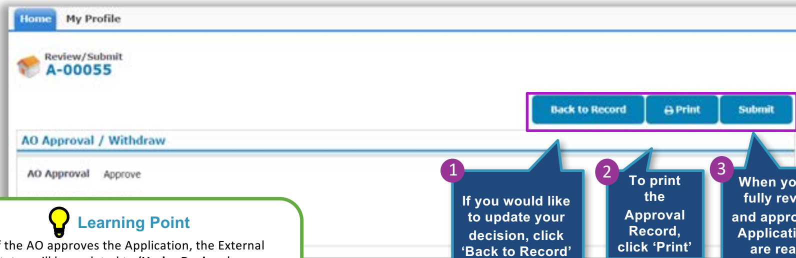
After you have reviewed, enter the decision to **approve**, **reject**, or **withdraw** the Application.



Note: To withdraw the Application at any time, navigate to this page, select '**Withdraw**' and click '**Save**.'

Submit the Application

Once you click 'Review/Submit,' you will be taken to a **read-only view** of the Approval Record for final review prior to submitting to PCORI for approval.



1 If you would like to update your decision, click 'Back to Record'

2 To print the Approval Record, click 'Print'

3 When you have fully reviewed and approved the Application and are ready to submit to PCORI, click 'Submit'

Learning Point

- If the AO approves the Application, the External Status will be updated to **'Under Review.'**
- If the AO rejects the Application, the External Status will be updated to '**Draft**' and the Application will be editable for updates.

Appendix D

The following topics are included in the Appendix:

- PCORI Information Requests (PIR)

Introduction to PIR: Process Flow

Applicant | PCORI Staff | Applicant | PCORI Staff

1 LOI Submission: PI/PI Designee
- Applying for funding from PCORI is a two-stage process; a LOI must be submitted before an organization is invited to submit a full Application.

2 LOI Review: PCORI Staff
- Committees of PCORI staff screen the LOIs based on the criteria outlined in the PCORI Funding Announcement (PFA).

3 App. Submission: PI/PI Designee
- If the organization is invited to continue in the application process, the next step will be to complete the full Application.
- A draft Application will be created in PCORI Online based on the initial LOI.

4 App. Review: Admin. Official
- The Administrative Official (AO) will review the Application.
- The AO will either submit the final Application to PCORI, or return it to the PI/PI Designee for revisions.

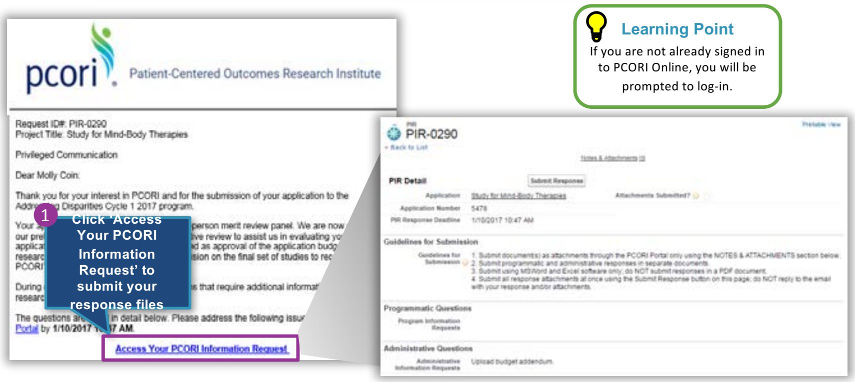
5 App. Review: PCORI Staff
- PCORI staff will review the Application for administrative compliance and responsiveness to the PFA.
- If compliant, the Application may then proceed to Merit Review.

During this process, PCORI Staff can send the Applicant a **PCORI Information Request (PIR)** through PCORI Online. The PIR typically will contain a list of questions regarding an Application, requesting the Applicant to upload additional information by a given deadline.

Introduction to PIR: Navigate through PIR Letter

If PCORI has requested additional information regarding your project, you will receive a **PCORI Information Request (PIR)** notification via email. **Navigate to the email**, review the details, and follow to the link to PCORI Online.

Learning Point
If you are not already signed in to PCORI Online, you will be prompted to log-in.



Note: If you are not automatically directed to the PIR record after logging in, then return to the email and click the link again in Step 1.

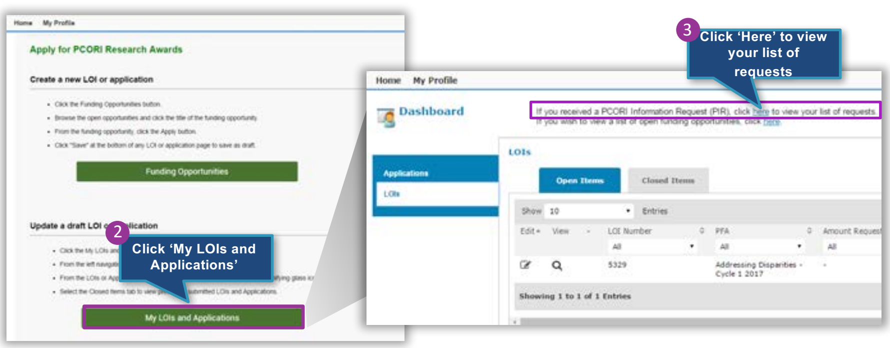
Navigation: Navigate to PIR Record through PCORI Online

Alternatively, you can navigate directly to **PCORI Online** to view the PIR details. To get started, log-in and select **Research Awards**.

Email Notification: You will receive an email notification if you have been sent a PIR.

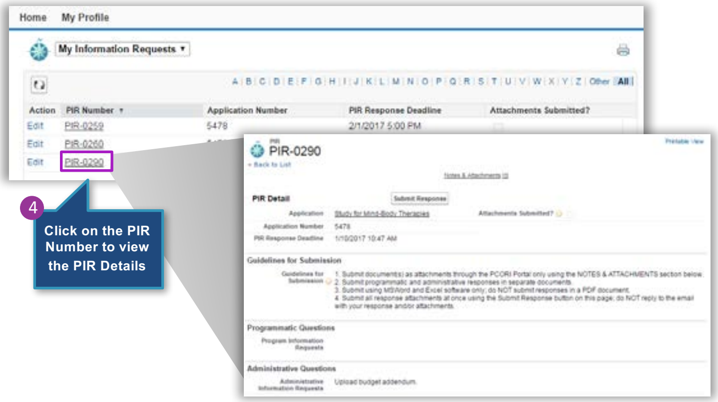
Navigation: Navigate to PIR Record through PCORI Online, Cont'd

Navigate to the **LOI & Application Dashboard**, where you can access a list of all **PIR requests**.



Navigation: Navigate to PIR Record through PCORI Online, Cont'd

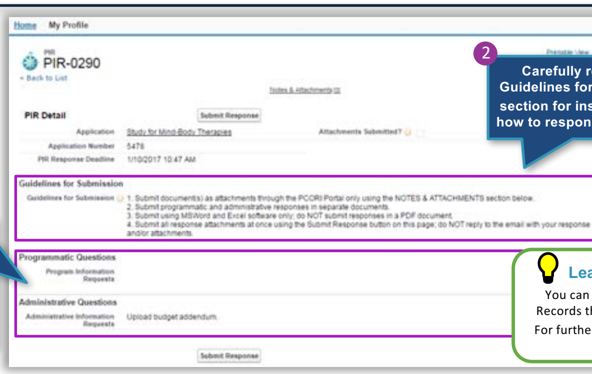
Once you navigate to your list of PIRs, you can view the **PIR Details**.



4 Click on the PIR Number to view the PIR Details

Upload & Submit Requested Files

Once you've navigated to the PIR record, carefully read the **Programmatic and Administrative Questions** and the **Guidelines for Submission**.



2 Carefully review the Guidelines for Submission section for instructions on how to respond to requests

3 Review the Programmatic and Administrative Information Requests, and prepare responses

Learning Point

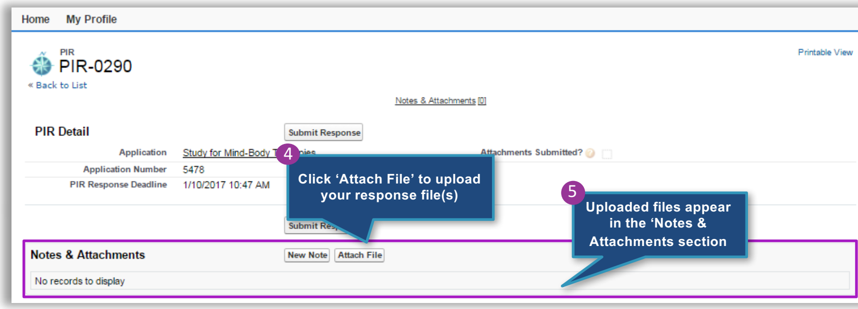
You can also navigate to PIR Records through PCORI Online.

For further instructions, see the Appendix.

Note: Prepare responses to the Programmatic and Administrative Questions offline (i.e. through Microsoft Word, Excel, etc.). Do not submit responses in a PDF document.

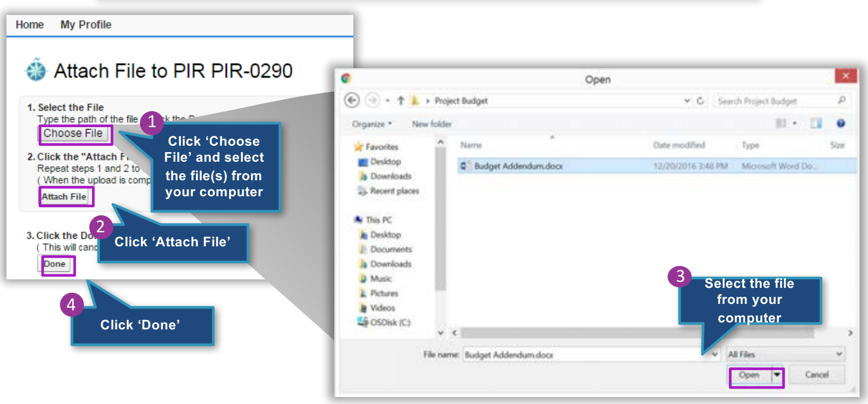
Upload & Submit Requested Files, Cont'd

When you have prepared your response(s), upload the file(s) in the **Notes & Attachments** section.



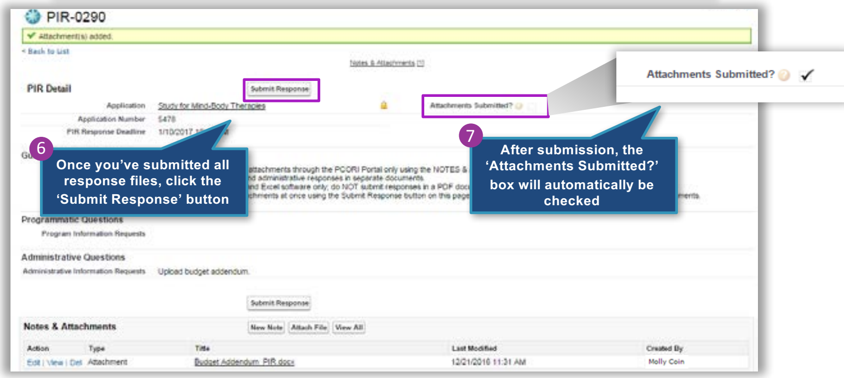
Navigation: Upload Files

To upload your file(s), follow the instructions on the **Attach File** page.



Upload & Submit Requested Files, Cont'd

After you have uploaded all responses in 'Notes & Attachments,' **submit the PIR response**.



Email Notification: Both PCORI Staff and the Applicant will receive email notifications after the PIR response is submitted.

Questions?

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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