

PCORI's New Online Application System

Pre-Award Management

January 23, 2017



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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)



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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.

The screenshot shows the PCORI login page. On the left, there is a 'Log in' section with fields for 'User Name' and 'Password', a 'Log in' button, and links for 'Forgot your password?' and 'New User?'. A blue callout box with a red '1' points to the 'New User?' link, stating: 'If you are a New User and don't know your login information, click 'New User?''. On the right, there is a 'New User' registration form with fields for 'First Name', 'Last Name', 'Email', 'Confirm Email Address', 'Password', and 'Confirm Password'. A blue callout box with a red '2' points to the 'Email' field, stating: 'Enter your name, the email address you use when interacting with PCORI, and a new password'. Below the registration form, there is a checkbox for 'In voluntarily providing this information, you agree to abide by our website privacy policy and terms of use' and a 'Join PCORI Portal' button.

Getting Started: Logging In

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

The screenshot shows the 'New User' registration form. It is divided into sections: 'Contact Information', 'Mailing Address', and 'Employer Information'. The 'Contact Information' section includes fields for 'First Name', 'Last Name', 'Email', and 'Confirm Email Address'. The 'Mailing Address' section includes fields for 'Phone', 'Street', 'City', 'State/Province', 'Country', and 'Zip/Postal Code'. The 'Employer Information' section includes a checkbox for 'Are you a federal employee?', a text field for 'Employer Name', and a dropdown for 'Employer Type'. A blue callout box with a red '3' points to the 'Contact Information' section, stating: 'Complete requested information'. A blue callout box with a red '4' points to the 'Employer Information' section, stating: 'Enter Employer Information'. A blue callout box with a red '5' points to the 'Submit' button, stating: 'Click 'Submit''. A green callout box with a yellow lightbulb icon and the text 'Learning Point' states: '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.

The screenshot shows the PCORI login interface. Callout 1 points to the 'User Name' and 'Password' fields with the instruction: 'Enter your User Name and Password, and click 'Log in''. Callout 2 points to the 'Forgot your password?' link with the instruction: 'If you need to reset your password, click 'Forgot your password?'. Callout 3 points to the 'Reset Password' button on the subsequent screen with the instruction: '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.'



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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Navigating PCORI Online: Home Screen

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

The screenshot shows the 'Welcome to the PCORI Portal' home screen. It features five main sections: 'Advisory Panels', 'Merit Review', 'Eugene Washington PCORI Engagement Awards', 'PCORI Research Awards', and 'Ambassador Program'. Each section has a brief description and a 'Click here' button. A callout box points to the 'PCORI Research Awards' section with the instruction: 'Click to view your Research Awards'.



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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](#).



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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).



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To recap, we've reviewed the following activities:



- Getting Started
- Navigating PCORI Online

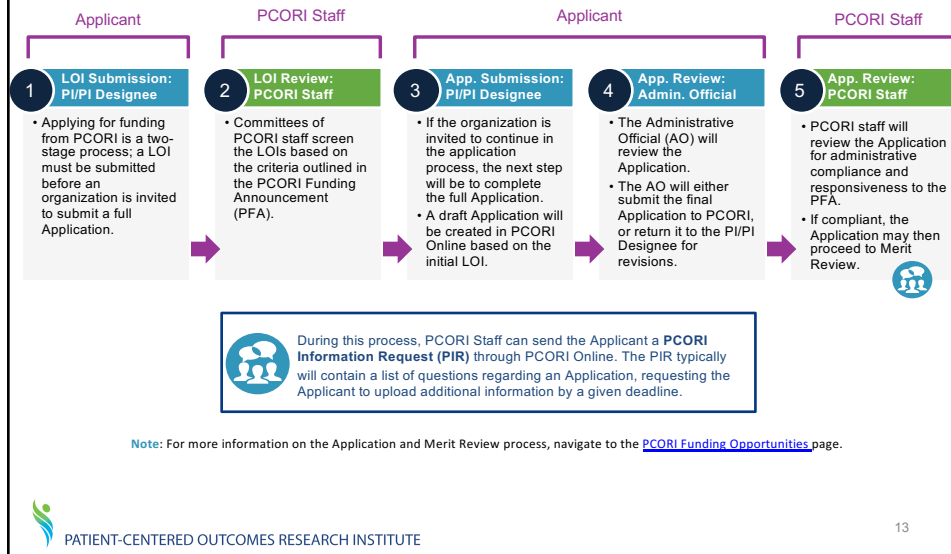
Live Demonstration!

LOI Submission

In this section, you will master the following activities:

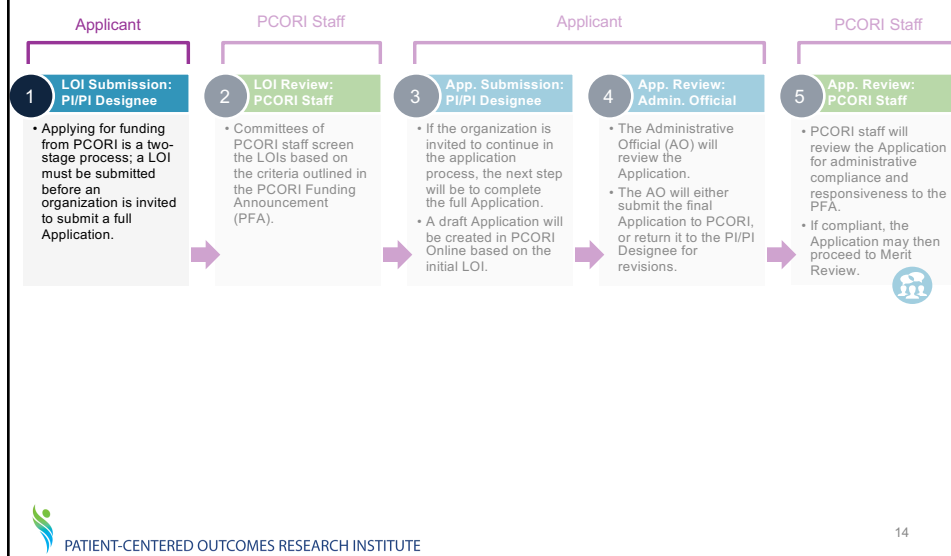
- Introduction to LOI Submission
- Complete & Submit a Letter of Intent (LOI)

LOI & Application Submission: Process Flow



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Introduction to LOI Submission: Process Flow



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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



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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.

PCORI Portal
Addressing Disparities - Cycle 1 2017

Contact Information Pre Screen Questionnaire Resubmission PI Information
Project Information Project Personnel Templates & Uploads **Review/Submit**

Contact Information
At this stage the only contact required is the Principal Investigator. If other contacts listed would like access to the LOI, please instruct them to create an account and have their info added to the LOI.

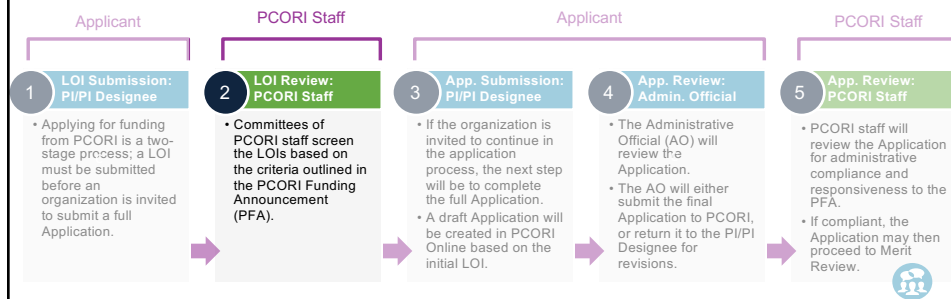
Principal Investigator (Contact) *



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Complete & Submit a LOI: Submitted



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)

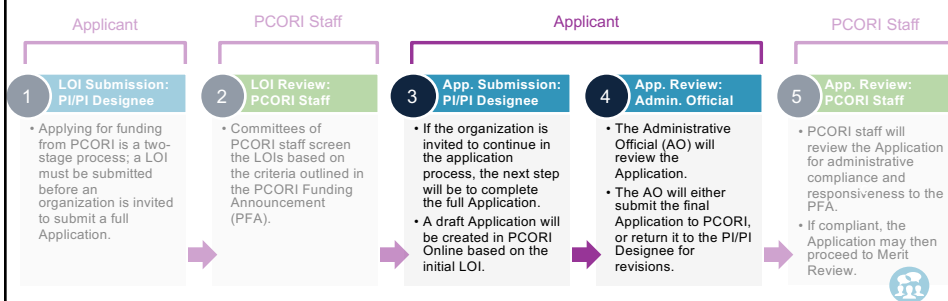
Live Demonstration!

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



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).



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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**.

The screenshot shows the 'Dashboard' with a 'My Profile' link. The 'Applications' section is highlighted, showing a list of applications. A callout box shows a detailed view of an application titled 'Addressing Disparities - Cycle 1 2017'. The application form includes tabs for 'Contact Information (LOI)', 'Pre Screen Questionnaire (LOI)', 'Resubmission (LOI)', 'PI Information (LOI)', and 'Project Information (LOI)'. The 'Contact Information (LOI)' tab is active, showing fields for 'Principal Investigator (Contact)' and 'Administrative Official'.

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.



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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



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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

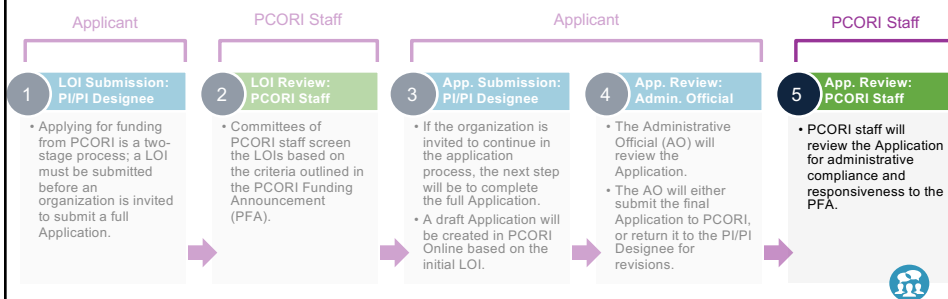
Once you click on the **Budget** tab, you will navigate through the following **eleven budget pages** to input information related to the yearly costs for your project. The first ten pages require input and the final page will provide a summary.

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.

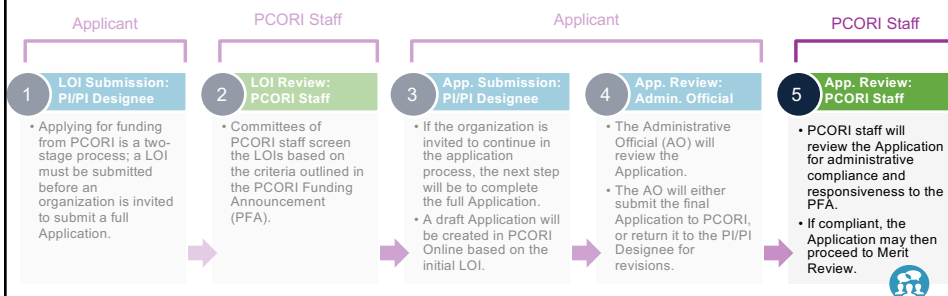
Note: Each page will allow you to edit up to 5 years. Additionally, pages indicated above by an asterisk (*) include a Peer Review Period (Year 6).



Complete & Submit the Application: Submitted



Introduction to PIR: Process Flow



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.



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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.

PIR-0290

Application: Study for Mind-Body Therapies

Application Number: 5478

PIR Response Deadline: 1/19/2017 10:47 AM

Guidelines for Submission

Guidelines for Submission:

1. Submit documents as attachments through the PCORI Portal only using the NOTES & ATTACHMENTS section below.
2. Submit programmatic and administrative responses in separate documents.
3. Submit using Word and Excel software only; do NOT submit responses in a PDF document.
4. Submit all response attachments or once using the Submit Response button on this page, do NOT reply to the email with your response and/or attachments.

Programmatic Questions

Program Information Requests

Administrative Questions

Administrative Information Requests

Upload budget addendum

Printable View

Back to List

Submit Response

Attachments Submitted? 0

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.



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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!



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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



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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, personal information, email address, and security settings

The screenshot shows the 'My Profile' page with the following callouts:

- 1** Click 'My Profile' (points to the 'My Profile' link in the top navigation bar)
- 2** Click 'Edit' to update your account information (points to the 'Edit' link under the 'Contact' section)
- 3** Click 'Email Address Change Request' to update your email address (points to the 'Email Address Change Request' link under the 'Contact' section)
- 4** Click 'Edit Employer Details' to edit information about your current employer (points to the 'Edit Employer Details' link under the 'Contact' section)

The page content includes a 'Welcome to the PCORI Portal' message, a 'Merit Review' section, and a 'Contact' section for Mr. Paul Ingalls. The 'Contact' section displays summary information (Name, Email, Phone, Mailing Address) and links to 'Edit', 'Email Address Change Request', and 'Edit Employer Details'.

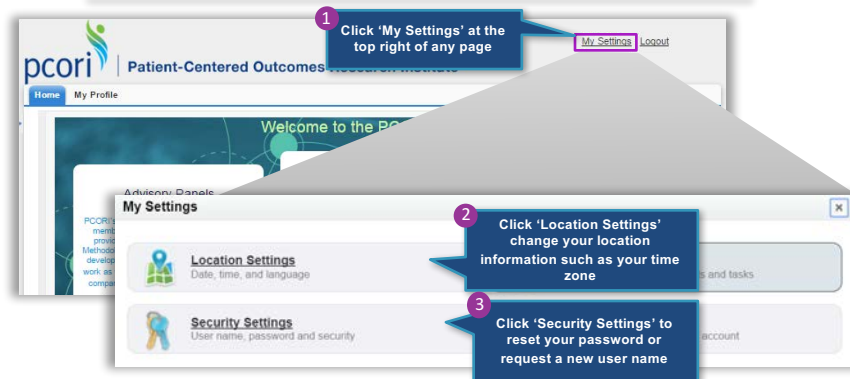


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Update User Profile Settings: My Settings

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

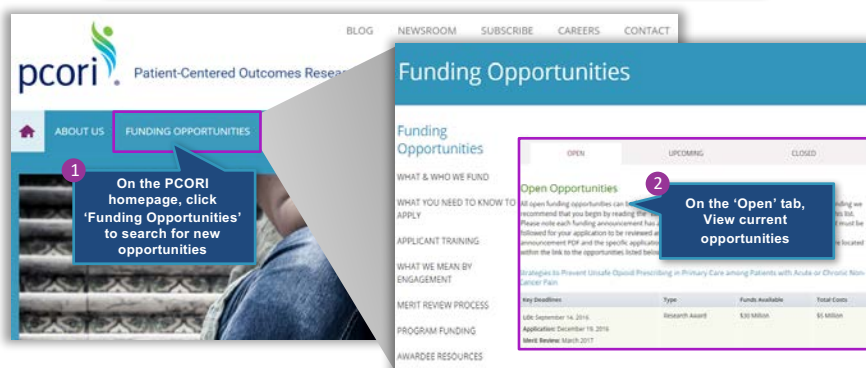


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Search for Funding Opportunities through PCORI.org

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.'

3 Click 'Apply Now'

4 Review the opportunity to which you would like to apply

5 Click 'Apply' to begin the LOI

Learning Point
After Step 3, you will be prompted to [log-in to PCORI Online](#) before proceeding with the LOI.



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Navigation: View/Update Existing LOIs and Applications

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

1 Click 'My LOIs and Applications' to navigate to the LOI & Application Dashboard

2 Use the left-side menu to view either Applications or LOIs

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



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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.

PCORI Portal
Addressing Disparities - Cycle 1 2017

Contact Information | Pre Screen Questionnaire | Resubmission | PI Information

Project Information | Project Personnel | Templates & Uploads | **Review/Submit**

Contact Information
At this stage the only contact required is the Principal Investigator. If other contacts listed would like access to the LOI, please instruct them to create an account and have their info added to the LOI.

Principal Investigator (Contact) *

Complete & Submit a LOI: Contact Information

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

The screenshot shows the 'Contact Information' tab in the PCORI Portal. A callout box labeled '1' points to a magnifying glass icon, stating: 'Use the magnifying glass to select the names of your PI, AO, PI Designee(s), Financial Officer, and Organization'. Another callout box labeled '2' points to the 'Location / Satellite' field, stating: 'Enter Location/Satellite, and Department'. A third callout box labeled '3' points to the 'Save & Next' button, stating: 'Click \'Save & Next\''. A 'Learning Point' box states: 'Awarder 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.

The screenshot shows the 'Pre Screen Questionnaire' tab in the PCORI Portal. A callout box labeled '1' points to a drop-down menu, stating: 'Use the drop-down menus to select \'Yes\' or \'No\' for the following questions'. Another callout box labeled '2' points to the 'Save & Next' button, stating: 'Click \'Save & Next\''. A 'STOP!' box states: '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.

1 Use the drop-down menu to select 'Yes' or 'No' for the first question

2 If 'Yes,' respond to the remaining questions and attach the resubmission invitation letter on the Templates & Uploads tab

3 Click 'Save & Next'



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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.

1 Complete the PI Information tab through open-ended questions, drop-down menus, and multi-select lists

2 Click 'Save & Next'



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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.

The screenshot shows the 'Project Information' tab in the PCORI Portal. The 'Project Title' is 'Study for Mind-Body Therapies'. The 'Is the primary focus of your study on a rare disease?' is 'No'. The 'Total direct costs' is '20,000', 'Total indirect costs' is '350', and 'Total amount requested' is '20,350'. A callout box labeled '1' points to the 'Project Information' tab and says 'Complete the Project Information tab through open-ended questions, drop-down menus, and multi-select lists'. Another callout box labeled '2' points to the 'Save & Next' button and says 'Click \'Save & Next\''. A third callout box points to the 'Chosen Simulation' dropdown menu and says 'Click \'Save & Next\''.



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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.

The screenshot shows the 'Project Personnel' tab in the PCORI Portal. The 'Full Name' field is empty, and the 'Institution' field is empty. A callout box labeled '1' points to the 'New' button and says 'Click \'New\' to add a new personnel record'. Another callout box labeled '2' points to the 'Full Name' field and says 'Enter the individual's name, and use the drop-down menus to enter information regarding their position/role'. A third callout box labeled 'Learning Point' points to the 'Primary perspective on the research team' dropdown menu and says 'At this point in time, you can name a Co-PI, if applicable.'.



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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.

The screenshot shows the 'PCORI Portal Addressing Disparities - Cycle 1 2017' interface. The 'Templates & Uploads' tab is selected. Callouts indicate the following steps:

- 1** Download and complete the LOI template (points to the 'LOI Template' download link).
- 2** Upload the applicable file (points to the 'Choose file' button and the 'Upload' button).
- 3** Click 'Save' (points to the 'Save' button).
- 4** When you have completed the LOI and are ready to submit, click 'Review/Submit' (points to the 'Review/Submit' button).

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



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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.

The screenshot shows the 'Review/Submit' page for John Todd. Callouts indicate the following steps:

- 1** If you would like to continue editing, click 'Back to Record' (points to the 'Back to Record' button).
- 2** To print the LOI, click 'Print' (points to the 'Print' button).
- 3** When you have fully reviewed the LOI and are ready to submit, click 'Submit' (points to the 'Submit' button).

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.



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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

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**.

The screenshot shows the 'My Profile' page with a sidebar menu containing 'Applications' and 'Libs'. The main content area displays a list of applications under 'Open Items' and 'Closed Items'. A callout box points to the 'Review/Submit' button on the 'Addressing Disparities - Cycle 1 2017' application form.

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.



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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.

The screenshot shows the 'My Profile' page with a sidebar menu containing 'Applications' and 'Libs'. The main content area displays a list of applications under 'Open Items' and 'Closed Items'. A callout box points to the 'Review the pre-populated information, and update as necessary' step.



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



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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.**

Home My Profile

PCORI Portal
Addressing Disparities - Cycle 1 2017

Contact Information (LOI) Pre Screen Questionnaire (LOI) Resubmission (LOI) PI Information (LOI) Project Information (LOI)

Project Personnel (LOI) **Budget** Project Narrative Milestones Templates & Uploads Review/Submit

Contact Information
At this stage, all contacts are required.

Principal Investigator (Contact)
John Todd

Administrative Official
Molly Conn



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 the Application: Budget, Cont'd

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

The screenshot shows the PCORI Portal interface for 'Addressing Disparities - Cycle 1 2017'. The 'Budget' tab is selected. The 'Personnel Budget Tables' form is displayed, showing 'Year 1' and 'Year 2' sections. Each section has a table with columns: Start Date, End Date, Select Row, Name, Key Personnel, Role On Project, Percent Effort(%), Calendar Months, Inst. Base Salary, Salary Requested, Fringe Benefits, Fringe Rate, and Total. The 'Create New Budget' button is highlighted with a callout box labeled '1 Click 'Create New Budget''.



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Complete the Application: Budget, Cont'd

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

The screenshot shows the 'Personnel Budget Tables' form with 'Year 1' and 'Year 2' sections. The 'Start Date' and 'End Date' fields are highlighted with a callout box labeled '2 Enter 'Start Date' and 'End Date' (365 days later) for each year'. A 'Learning Point' box is also present, stating: 'Once you enter the Start and End date for each year of the project on the Personnel Budget Table (the first Budget page), the dates will be copied over to the remaining pages.'

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

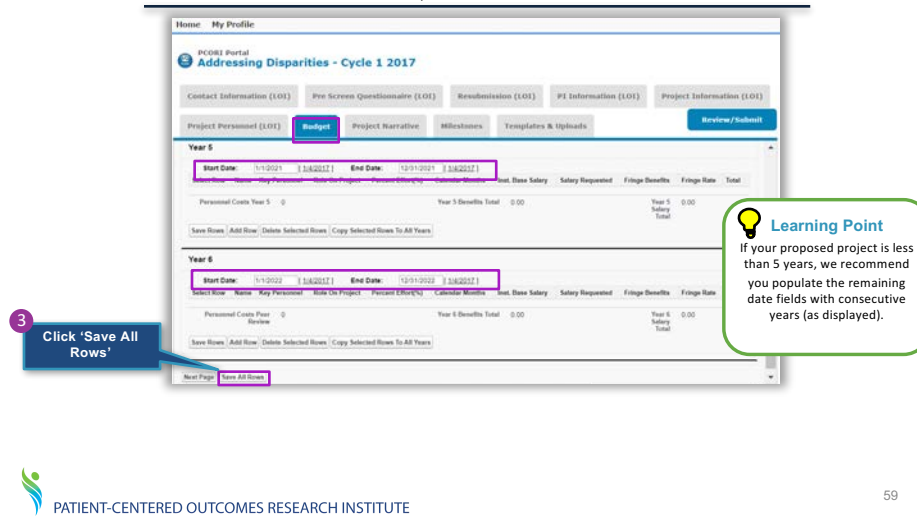


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Complete the Application: Budget, Cont'd

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.'



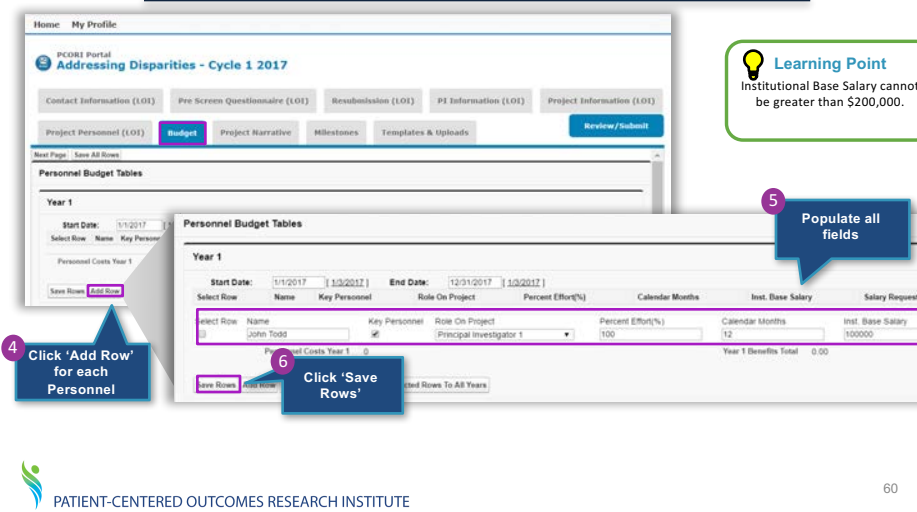
3 Click 'Save All Rows'

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

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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.



4 Click 'Add Row' for each Personnel

5 Populate all fields

6 Click 'Save Rows'

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

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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.'

9 Click 'Copy Selected Rows To All Years' to add Personnel to each project year

7 Click 'Add Row' to add Personnel as applicable

8 Click 'Delete Selected Rows' to remove

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.



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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.

1 Click 'Next Page'

2 Click 'Save All Rows' before navigating to next page

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.



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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.



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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.



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Complete the Application: Budget, Cont'd

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

1 Review for accuracy

2 These costs are not applicable in Peer Review (Year 6) Period

3 Subtotals and Totals automatically calculated

Budget Category Totals	Year 1	Year 2	Year 3	Year 4	Year 5	Peer Review Period
Personnel Costs	220000	220000	220000	220000	220000	220000
Consultant Costs	0	0	0	0	0	0
Supply Costs	0	0	0	0	0	0
Scientific Travel Costs	0	0	0	0	0	0
Programmatic Travel Costs	0	0	0	0	0	0
Other Expenses	0	0	0	0	0	0
Equipment Costs	0	0	0	0	0	0
Subcontractor Direct Costs	0	0	0	0	0	0
Subtotal Direct Costs	220000	220000	220000	220000	220000	220000
Subcontractor Indirect Costs	0	0	0	0	0	0
Total Direct Costs	220000	220000	220000	220000	220000	220000
Total Indirect Costs	0	0	0	0	0	0
Total Costs	220000	220000	220000	220000	220000	220000
Total Costs for Entire Proposed Project Period						1320000



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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.

1 Click 'Project Narratives'

Budget Category Totals	Year 1	Year 2	Year 3	Year 4	Year 5	Peer Review Period
Personnel Costs	220000	220000	220000	220000	220000	220000
Consultant Costs	0	0	0	0	0	0
Supply Costs	0	0	0	0	0	0
Scientific Travel Costs	0	0	0	0	0	0
Programmatic Travel Costs	0	0	0	0	0	0
Other Expenses	0	0	0	0	0	0
Equipment Costs	0	0	0	0	0	0
Subcontractor Direct Costs	0	0	0	0	0	0
Subtotal Direct Costs	220000	220000	220000	220000	220000	220000



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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.

The screenshot shows the 'Project Narratives' tab in the PCORI Portal. The 'Project Start Date' is 1/1/2017 and the 'Project End Date' is 12/31/2022. A blue callout box with a circled '1' points to the 'Project Narrative' tab and says 'Enter information through open-ended questions, drop-down menus, and multi-select lists'. A purple callout box with a circled '2' points to the 'Save & Next' button and says 'Click \'Save & Next\''. A 'Learning Point' box on the right states: 'The Projected Start and End Date should match the dates listed in the Budget pages.'



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Complete the Application: Milestones

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

The screenshot shows the 'Milestones' tab in the PCORI Portal. A blue callout box with a circled '1' points to the '+ New' button and says 'Click \'New\' to add a new Milestone record'. A purple callout box with a circled '2' points to the 'Milestone Name', 'Description', and 'Due Date' fields and says 'Enter the Milestone Name, Description, and Due Date'. A blue callout box with a circled '3' points to the 'Save' button and says 'Click \'Save\''. The form shows a table with columns for Milestone Name, Description, and Due Date. The first row has '50% Recruitment Milestone' in the Name and Description fields, and '5/6/2017' in the Due Date field.



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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.



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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](#).



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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.

Home My Profile

Review/Submit
Addressing Disparities - Cycle 1 2017

Back to Record Print Submit

Contact Information (LOI)

Principal Investigator (Contact)	John Todd
Administrative Official	Molly Cain
PI Designee 1	Randy Randelman
PI Designee 2	Sara Aslins
Financial Officer	Rachel Peters
Location/Subsite	Washington D.C.
Department	Science
Organization	Center for MS

Pre Screen Questionnaire (LOI)



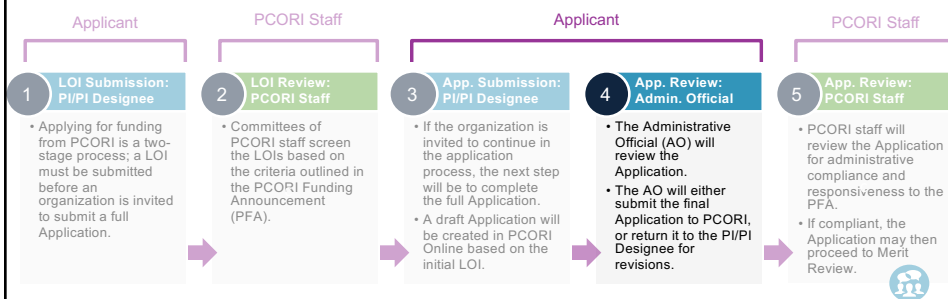
Email Notification: Upon submission, the Applicant will receive an email confirmation that the Application has been sent to the AO for approval.



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Complete the Application: AO Approval



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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.

The screenshot shows the 'Applications' dashboard. Callout 1 points to the 'Applications' link in the left sidebar. Callout 2 points to the 'Submitted' status in the application list. Callout 3 points to the application entry in the table.

AO Approve/Withdraw	Project Title	Application Number	End Date	Status
All	Study for Head-Body Therapies	1004	6/26/2017	Submitted

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.



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Complete the Application: AO Approval, Cont'd

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

The screenshot shows the 'AO Approval / Withdraw' form. Callout 4 points to the 'Applications' link in the sidebar. Callout 5 points to the 'AO Approval' dropdown menu. Callout 6 points to the 'Save' button. Callout 7 points to the 'Review/Submit' button.

Learning Point

The Application is currently read-only. If updates are necessary, the AO should reject the Application at which point it will become editable again.

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



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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.

The screenshot shows a web application interface with a top navigation bar containing 'Home' and 'My Profile'. Below this is a section titled 'Review/Submit' with a sub-header 'A-00055'. At the bottom of this section are three buttons: 'Back to Record', 'Print', and 'Submit'. Below the 'Review/Submit' section is another section titled 'AO Approval / Withdraw' with a sub-header 'AO Approval Approve'. Three numbered callouts point to the buttons: 1. 'Back to Record' button: 'If you would like to update your decision, click 'Back to Record''. 2. 'Print' button: 'To print the Approval Record, click 'Print''. 3. 'Submit' button: 'When you have fully reviewed and approved the Application and are ready to submit to PCORI, click 'Submit''. A 'Learning Point' box is also present on the left side of the screenshot.

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.



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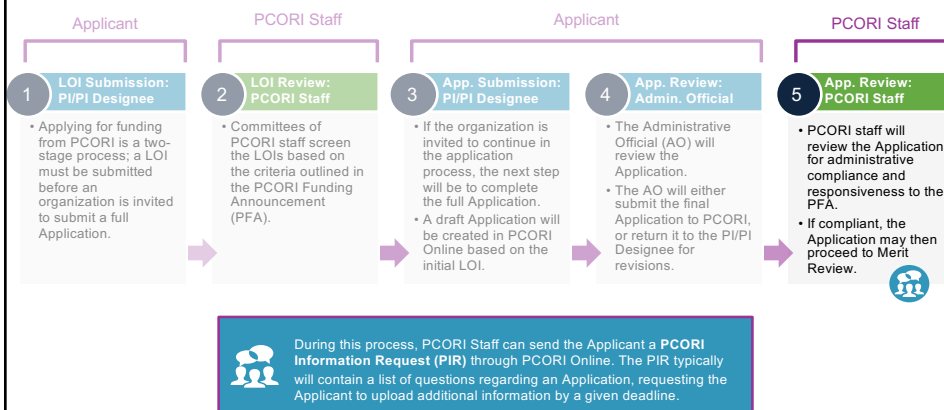
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Appendix D

The following topics are included in the Appendix:

- PCORI Information Requests (PIR)

Introduction to PIR: Process Flow



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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.**

The email from PCORI (Request ID: PIR-0290) is addressed to Molly Coon and thanks her for her application. It includes a link to 'Access Your PCORI Information Request' to submit response files. A 'Learning Point' box notes that users not signed in to PCORI Online will be prompted to log in.

The PCORI Online PIR record page (PIR-0290) shows details for the application 'Study for Mind-Body Therapies' (Application Number: 5476, PIR Response Deadline: 1/19/2017 10:47 AM). It includes guidelines for submission and links to submit responses and attachments.

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.



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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.

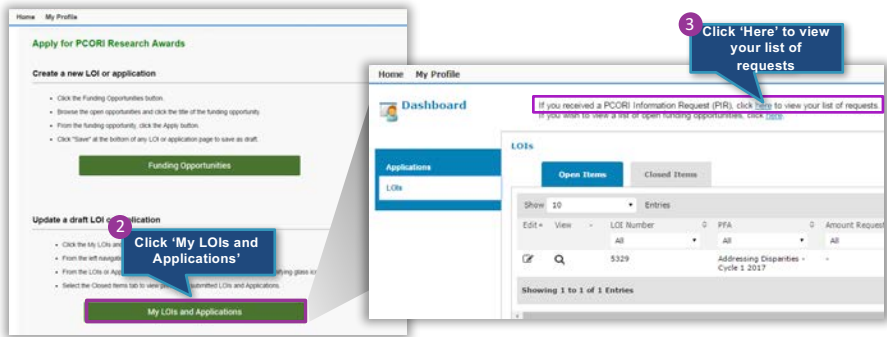


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Navigation: Navigate to PIR Record through PCORI Online, Cont'd

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



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

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

Home My Profile

My Information Requests

PIR-0290

Click on the PIR Number to view the PIR Details

PIR Detail

Application: Study for Mind-Body Therapies

Application Number: 5478

PIR Response Deadline: 1/19/2017 10:47 AM

Guidelines for Submission

Programmatic Questions

Administrative Questions



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Upload & Submit Requested Files

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

Home My Profile

PIR-0290

PIR Detail

Application: Study for Mind-Body Therapies

Application Number: 5478

PIR Response Deadline: 1/19/2017 10:47 AM

Guidelines for Submission

Programmatic Questions

Administrative Questions

Upload budget addendum

Submit Response

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.



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Upload & Submit Requested Files, Cont'd

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

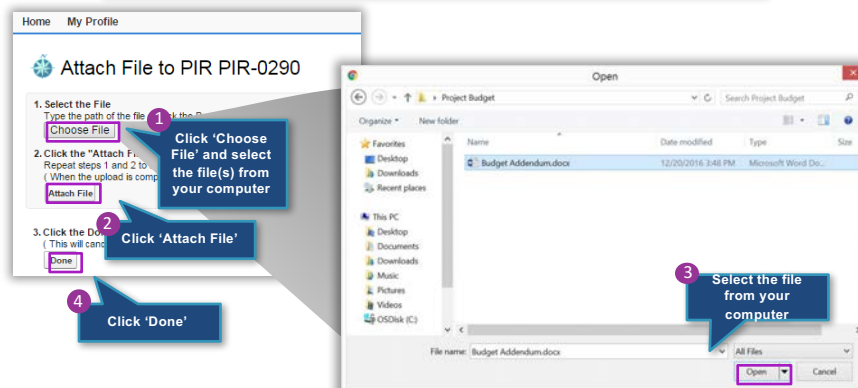


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Navigation: Upload Files

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



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Upload & Submit Requested Files, Cont'd

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

The screenshot shows the PIR-0290 submission page. At the top, a green bar indicates 'Attachments(s) added'. Below this, the 'PIR Detail' section shows the application 'Study for Men's Body Therapies' with application number 5478 and a response deadline of 1/19/2017. A callout box labeled '6' points to the 'Submit Response' button, stating: 'Once you've submitted all response files, click the 'Submit Response' button'. Another callout box labeled '7' points to the 'Attachments Submitted?' checkbox, stating: 'After submission, the 'Attachments Submitted?' box will automatically be checked'. The 'Notes & Attachments' section at the bottom shows a table with one entry: 'Budget Addendum_PIR.docx'.



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



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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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