PCORI Online User Manual: Submitting an Application

Improving Methods for Conducting PCOR

Fall 2014 Cycle

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About the PCORI Online System

The PCORI Online System (pcori.fluxx.io) supports PCORI Funding Announcements (PFAs), application submission, and PCORI's review process. Before you begin, please note the following Frequently Asked Questions:

- To apply for PCORI funding you must have an account in the system. If you do not have one, create one using the instructions below. If you have applied to PCORI in the past, your account has been retained. You do not need to create a new account, but you will need to request a new password. Just click "Reset or create password" to receive your new password or enter your username and password in the sign-in boxes.

- The PCORI Online System is only compatible with **Safari** and **Google Chrome** browsers.

- To complete all sections of your application, use the left-side tabs or the "Previous" and "Next" buttons at the bottom of the window.

    o To save your work, click the "Save and Review" tab and then the "Save and Review" button. **Be sure to save your work before closing the browser window or your work will be lost.**

- If you run into technical difficulties using the PCORI Online System, please contact us at pfa@pcori.org.

Log Into PCORI Online

Use the PCORI Online System to submit your application. **To complete your application, you must have previously submitted a Letter of Intent (LOI) to PCORI**. (Note that for some PFA types, LOIs must be approved by PCORI prior to the submission of an application. Refer to the PFA for further guidance.)

- To login, go to pcori.fluxx.io
- Enter the username and password you used to submit your LOI
- If you forgot your password, click the "Reset or create password" link

Welcome to PCORI Online

Login Now:

Username

Password

Sign in

Reset or create password

Technical Note: Please use Chrome or Safari browsers.

If you are a new user, please register by clicking on the "Create an Account Now" button.

If you are a reviewer or have applied to PCORI in the past, you do not need to create a new user account. Please click the "Reset or create password" link to the left to receive your new password.

Current Announcements

Funding Opportunities – Spring 2014 Cycle

The PCORI Online system is now open for submission of an LOI. To view all available opportunities, please visit our Funding Center.

Application Resources

View PCORI's Funding Center for application guidelines and templates, key dates, PCORI Funding Annoucements (PFAs) and additional information.

The PCORI Online User Manual now contains step-by-step instructions on how to submit your LOI.

For any administrative or technical questions while submitting your LOI, please email us at pfa@pcori.org or call us at 202-627-1885.

Create an account now

Locate Your Application

To begin your application, click the yellow pencil icon next to the request number. The application includes previous contact and project information from the LOI and requires additional information.

SC14-1403-11849   🖊 ⊖ $1,614,400.00   3/4/2014   Improving Methods for Conducting PCOR   Application: In Progress Withdraw

Living with Fibriods in the African American Community

Click the yellow pencil icon to begin your application.

Create Your Application

Use the left-side navigational links and the "Previous" and "Next" buttons at the bottom of the pages to guide you through the application creation and submission process.

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- PROJECT INFORMATION
- KEY PERSONNEL
- MILESTONES
- TEMPLATES AND UPLOADS
- SAVE AND REVIEW

PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

- To complete all sections of the Application, use the left side navigational links and the "Previous" and "Next" buttons at the bottom of the screen. Please review information previously entered at the LOI phase and update, if necessary. Additional application information is required in ALL sections.
- To save your work, please go to the "Save and Review" tab and click "Save and Review." Please be sure to do this before closing the browser window or your work will be lost.
- Once you've completed all sections, click "Review and Submit" in the left side navigation, then click "Save and Review." You will be taken to a review screen to review, print, and submit your application to your Administrative Official for final approval.
- Fields marked with (*) are required.
- Begin typing the Organization's name in the field below. If the Organization does not appear in the auto-populated list, you must click "Add New" to create a new entry. A pop-up box will appear for you to enter this information; all fields in bold are required. Note: if your organization does not have a DUNS number, click here.
- You must designate an Administrative Official (AO) with a valid email address in order to submit your application to PCORI.

Save Your Application

While working on your application you are free to save your work at any time. To save your work, go to the "Save and Review" tab and click the "Save and Review" button. **Please be sure to do this before closing the browser window or your work will be lost.** After saving your work, you may click on the "Back to Main Menu" button to leave the current application session.

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- Fields marked with (*) are required.

Once you've completed all sections of the Application, click the 'Save & Review' button. The system will indicate any incomplete fields.

*When all required fields are complete, after clicking 'Save & Review,' you will be taken to a review screen to review your Application, print, and submit your application to your Administrative Official (AO) for approval and final submission. **The organization's AO is the only individual who can make the final submission to PCORI. Please follow up with your AO to ensure the application is submitted.***

| Back to Main Menu | Previous | Save And Review |

> You must click this "Save and Review" button for your work to be saved.

To return to a saved draft application, click on the yellow pencil icon on the landing page.

SC14-1403-11849   ✏️ ⊖ $1,614,490.00   3/4/2014   Improving Methods for Conducting PCOR

Living with Fibriods in the African American Community
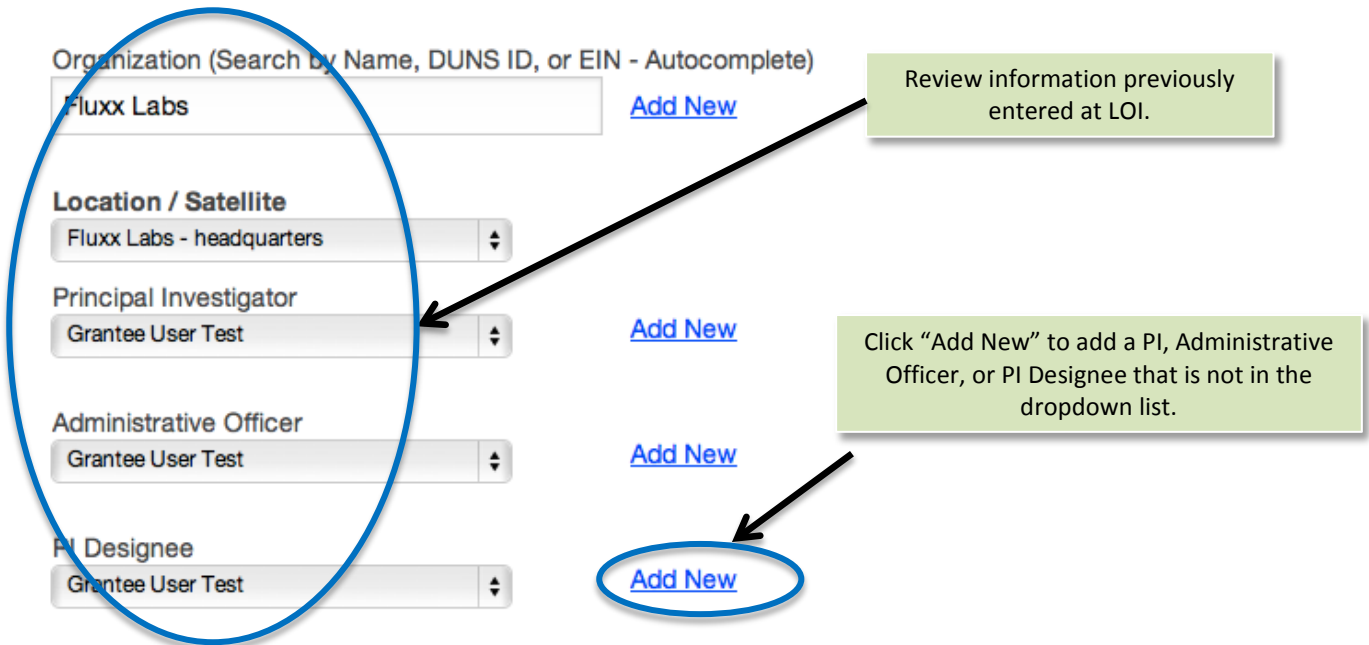
Application: In Progress Withdraw

> Click on the yellow pencil icon to return to your application.

> Status of the application is "In Progress" until all required fields are completed and the application is submitted to the Administrative Official.

PI and Contact Information

Please review the information that was entered with the submission of your LOI. You may edit the information, if needed.

Note that Organization, PI, and Administrative Officer information are <u>required</u> for application submission. **The PI and the Administrative Officer <u>cannot</u> be the same person.**

Organization (Search by Name, DUNS ID, or EIN - Autocomplete)

Fluxx Labs   Add New

Review information previously entered at LOI.

Location / Satellite

Fluxx Labs - headquarters

Principal Investigator

Grantee User Test   Add New

Click "Add New" to add a PI, Administrative Officer, or PI Designee that is not in the dropdown list.

Administrative Officer

Grantee User Test   Add New

PI Designee

Grantee User Test   Add New

Organization Information

Organization Information

*Street Address 1

1828 L Street

Street Address 2

Suite 900

*City

Washington

*State

District of Columbia ⬍

*Country

United States of America ⬍

*Zip Code

20036

*Congressional District

3 ⬍

Review Additional PI Information

Review the Principal Investigator information entered with the LOI. You may edit the information, if needed. Use the "Next" button at the bottom of the page to continue to the next section.

*To which of the PCORI national research priorities or targeted funding announcements are you applying?

Improving Methods for Conducting PCOR ⬍

*Please select which Improving Methods for Conducting PCOR announcement you are applying for

PROMIS-focused ⬍

(FOR GENERAL IMPROVING METHODS ONLY) To which merit review panel is this application being submitted for consideration? Please see the Improving Methods Application Guidelines for additional information on these review panels.

General and design-specific analytic methods ⬍

*For the purpose of this project, with which group does the PI or project lead identify primarily?

Patient/Consumer ⬍

*Have you interacted with PCORI in the past in the following ways? (Select all that apply)

Joined a PCORI email list Visited PCORI website Participated in applicant training Watched a PCORI webinar Attended a PCORI sponsored event in-pe Attended an event where PCORI was featu Met with PCORI staff Applied for PCORI research funding	> <	Applied to be a reviewer of PCORI researc Served as a PCORI merit reviewer

Principal Investigator Information

Please respond to questions regarding the Principal Investigator's research experience and prior funding. All fields are required.

*Position Title

Deputy Director of Urology

*Degree

AAS AB APRN BA BC BCH BCHIR BM	> <	MD MPH

*Did the Principle Investigator complete his or her terminal research degree or medical residency within the previous 10 years?

Yes ⬍

*How many years of research experience does the PI or project lead have after attaining his or her terminal degree?

10+ Years ⬍

*How many years of research experience does the PI or project lead have related to this field of research?

10

*Approximately how many grants/contracts have you had funded as the PI or project lead?

6 - 10 ⬍

*Total dollar amount (direct costs) for largest grant/contract for which you were the PI:

$1.1 to 5 million ⬍

*Have you received grants/contracts from: (Choose all that apply)

Project Information

Enter additional project information.

Enter the projected start and end date of the project by clicking on the calendar icon.

Enter additional project information questions. Refer to the PFA and the Application Guidelines, found on the PCORI Funding Center, for additional guidance.

All fields are required.

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PI AND CONTACT INFORMATION

PROJECT INFORMATION

KEY PERSONNEL

MILESTONES

TEMPLATES AND UPLOADS

SAVE AND REVIEW

PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

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- Once you've completed all sections, click "Review and Submit" in the left side navigation, then click "Save and Review." You will be taken to a review screen to review, print, and submit your Application to your Administrative Official for final approval.
- Fields marked with (*) are required.

*Is this a resubmission?   No

*Total direct costs (Prime and Subcontracts)
1489255.0

*Total indirect costs (Prime and Subcontracts)
125235.0

*Total amount requested
$1,614,490.00

*Are you requesting a budget greater than what is outlined in the PFA?
No

*Please describe your project direct costs for the total project
Less than $1.5 million

*Please select your estimated project length
18 - 36 months

Note that all sections of the Technical Abstract must be addressed. The Technical Abstract may be prepared in advance and either entered or pasted directly into PCORI Online. A template for this purpose is available here.

Technical Abstracts may not exceed 6000 characters (including spaces). LOIs with Technical Abstracts exceeding this limit will be rejected.

*Technical Abstract
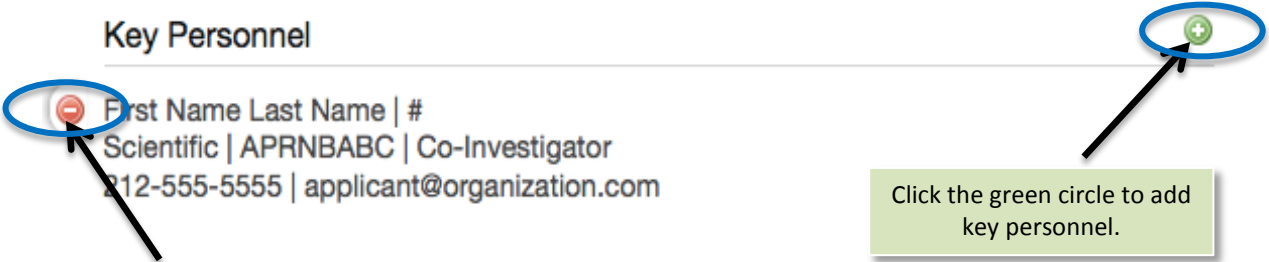Character limit is 6000 including spaces.

BACKGROUND

The basis of the African American Community seems to have engaged in multiple

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Path: p » strong » span

Key Personnel

- To add key personnel: click the green plus sign, enter key personnel information, and click "Create Key Personnel."
- To remove key personnel: click the red minus sign that will appear when you hover your cursor over a name.
- **Note: After you click "Create Key Personnel" you cannot go back to edit any information. If there is an error, you must remove the entry and create a new one.**
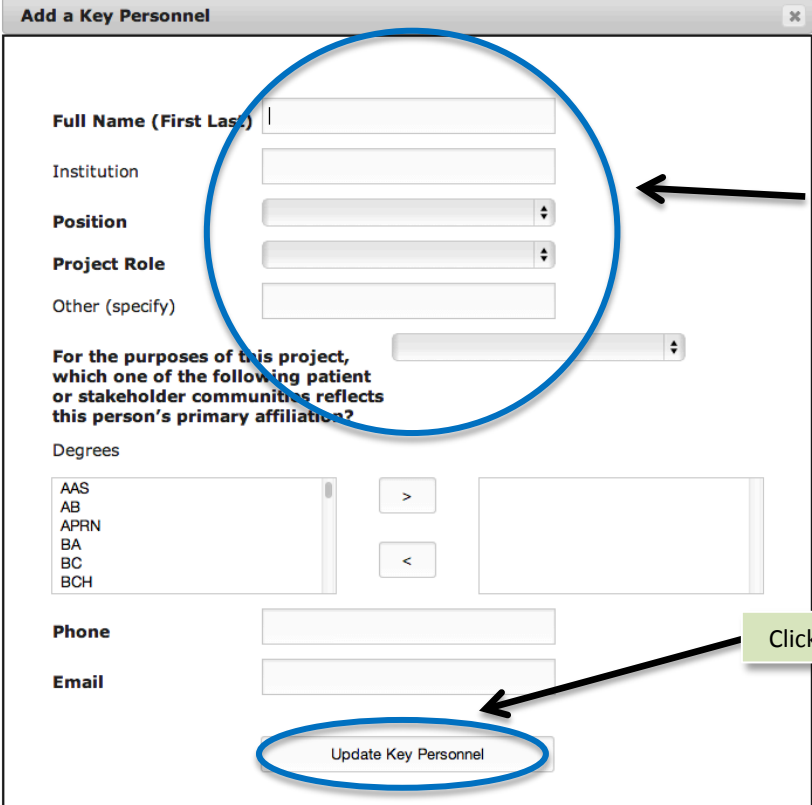
Key Personnel

First Name Last Name | #
Scientific | APRNBABC | Co-Investigator
212-555-5555 | applicant@organization.com

Click the green circle to add key personnel.

Click the red circle to delete key personnel.

Add a Key Personnel

Full Name (First Last)

Institution

Position

Project Role

Other (specify)

For the purposes of this project, which one of the following patient or stakeholder communities reflects this person's primary affiliation?

Degrees

AAS
AB
APRN
BA
BC
BCH

Phone

Email

Update Key Personnel

Required information is in **bold.**

Click "Update Key Personnel."

- Please confirm that you have added all Key Personnel by clicking the checkbox. You may be asked to complete additional key personnel question(s).

After finishing these steps you may click "Next" to continue to the next section of the application.

☑ *Please confirm that you have added all your Key Personnel.

Key Personnel ⊕

Name your primary patient partner(s) on this project

Name your primary stakeholder partner(s) on this project

*Will the patient or stakeholder partners engaged in the study receive financial compensation for their role in this project?

N/A ⬍

![pcori logo]

Milestones

Enter project milestones by clicking on the green circle (plus sign). A popup window will appear. Generally, milestones measure concrete, specific outcomes such as deliverables. Enter milestones information, including milestone name, description, and projected completion date. You may delete milestones by clicking on the red circle (minus sign), which will appear as you hover your cursor over the entry. **You cannot edit your entry; you must delete and start over.**

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- Fields marked with (*) are required.

Generally, milestones measure concrete, specific outcomes such as deliverables. Milestones should only include activities that are supported by the PCORI contract in question. Base the milestone projected completion dates on your project's projected start date, as entered in the Project Information portion of your Application entry.

Insert your key project-specific milestones by clicking the green plus sign. All fields are required. In addition:
• At least one milestone entry per year is required
• You may delete entries by clicking on the red delete symbol that will appear as you hover your cursor over the entry
• You cannot edit your entry; you must delete and start over

☑ *Please confirm that you have added all your Milestones.

Milestones   ⊕

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Add a Milestone

Year

Milestone Name

Description

> Enter milestone information. All fields are required.

> Click "Update Milestones" after entering your information.

Projected Completion Date (MM/DD/YYYY)

Update Milestones

Templates and Uploads

All PFAs require additional documents to complete the application. For specific instructions, refer to the PCORI Application Guidelines found in the PCORI Funding Center for the relevant PFA type. Note that all uploads must be PDFs.

- To upload a document, click the green plus sign. Note: All uploaded files must be in PDF format.
- Click "Add files" and choose the file from your computer.
- Select the name of the required document that you are uploading from the dropdown list. Note: Disregard components marked "Application Only." If you select the wrong component and continue with the upload, you can make a correction by clicking the pen and paper icon after the upload is completed. See the second screenshot below.
- Click "Start upload."
- To delete an uploaded file, click the red minus sign.

Select files
Add files to the upload queue and click the start button.

Filename		Size	Status	
Test.pdf	A – Research Plan (Application Only) B – Engagement Template C – People and Places (Application Only) D – Budget Form (Application Only) E – Letters of Support (Application Only) LOI Supporting Documentation Technical Abstract	2 MB	0%	⊖
		2 MB	0%	

Add files   Start upload

UPLOAD DOCUMENTS

test_document.pdf
Budget Detail* By Grantee User Test Added at 2:52 PM on June 14, 2013

test_document.pdf
Budget Justification (for first year and total project period) By Grantee User Test Added at 2:52 PM on June 14, 2013

test_document.pdf
People and Places By Grantee User Test Added at 2:52 PM on June 14, 2013

test_document.pdf
Research Plan By Grantee User Test Added at 2:52 PM on June 14, 2013

Save and Review

- Once you've completed all sections, go to the "Save and Review" tab and click the "Save and Review" button. Any incomplete sections will be highlighted in the left navigation panel, with incomplete fields marked in each section.

- If all required fields are complete, you will see a summary screen. From this screen, you can review, print, or save your application as a PDF.

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Back to Main Menu   Previous   Save And Review

Click "Save And Review" to review the LOI before submitting. Incomplete fields will be highlighted in the left navigation panel.

Submit to Administrative Official

Review the summary of your application. Click "Edit Request" if changes are necessary. Once complete, click the "Submit to AO" button to submit your application to the Administrative Official designated on the "PI and Project Information" tab.

Note that only the AO may submit the application to PCORI. <u>Please contact your AO to ensure that your application was reviewed and submitted.</u>

Please review your Application fully. You **WILL NOT** *be able to make changes after you click "Submit to AO." It is your responsibility to ensure that your AO submits the application to PCORI before the deadline.*

If changes to the application are required, the AO may release the application back to the Principal Investigator (PI). In order to do so, the AO must click the "Send Back to PI" button. The AO will need to notify the PI that an action is required on their part.

Once the AO has reviewed the application, they **must** click "Submit" in order to submit the application to PCORI.

Resources and Contact Information

- All active opportunities can be found in the PCORI Funding Center.
- To find application templates and any additional instruction for a specific opportunity, select the opportunity of interest in the Funding Center and review the applicant resources section of the page.
- PCORI's Applicant FAQs cover common questions that an applicant may have about PCORI and the application process. These are updated on a regular basis to reflect questions received through our helpdesk and applicant town halls.
- Applicant training materials and information about PCORI's applicant town hall sessions will be posted on PCORI's Training Materials page. Once available, applicants will receive an email about these opportunities.
- If you have questions, please contact us at pfa@pcori.org.