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.

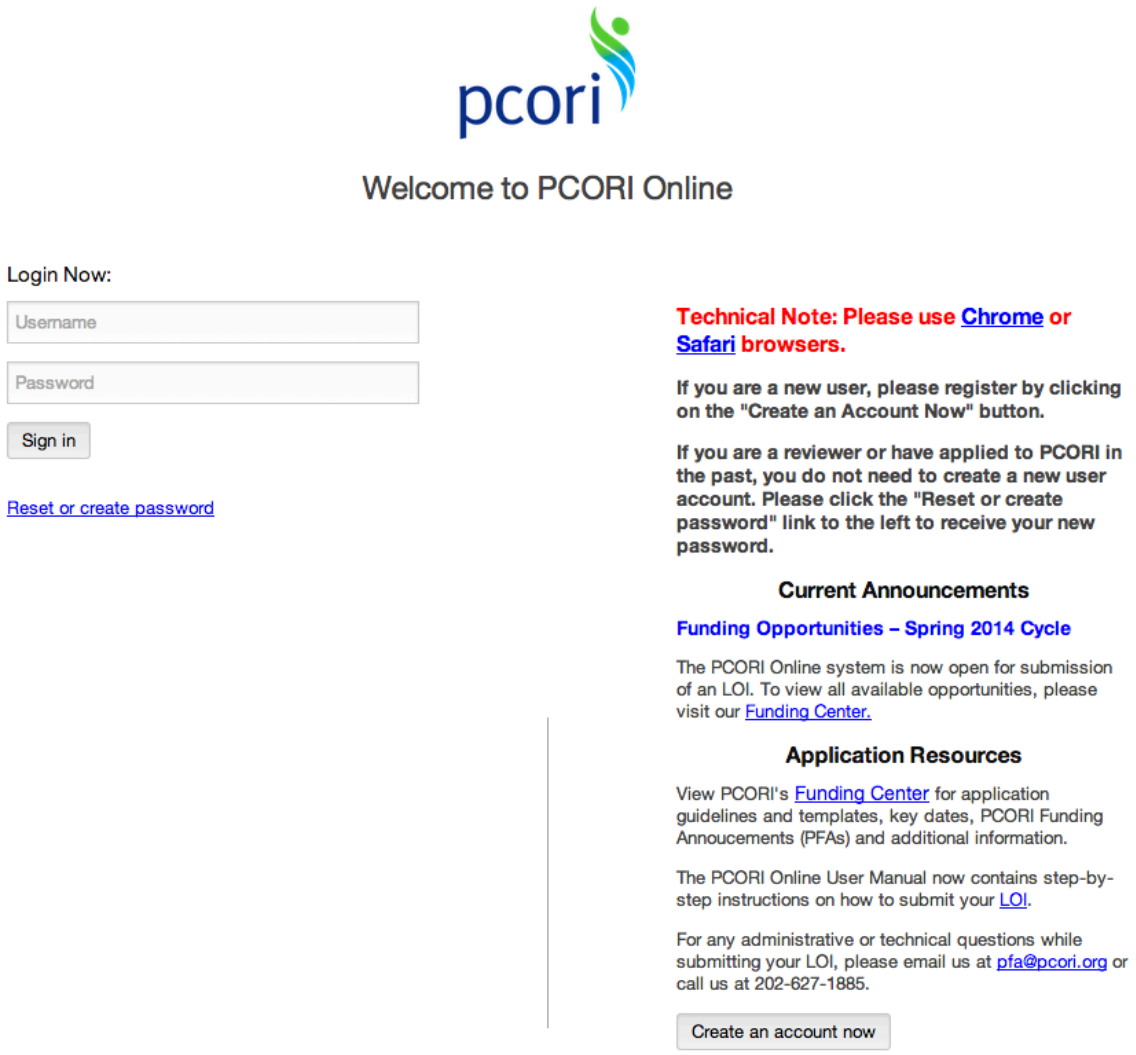
    - To save your work, click the "Save and Review" tab and then the "Save and Review" button. **Be sure to save your work before closing the browser window or your work will be lost.**

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

Log Into PCORI Online

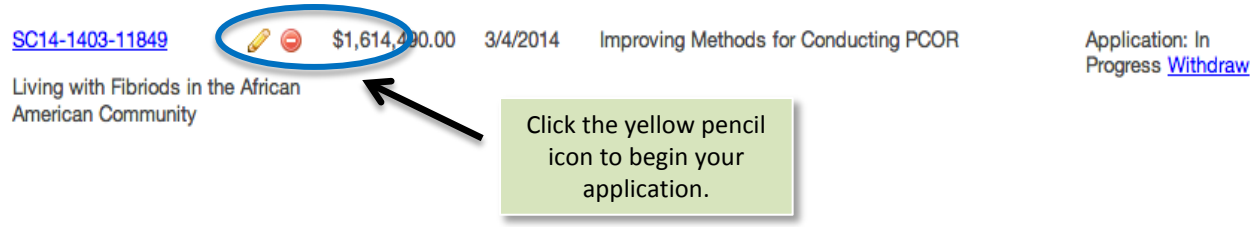
Use the PCORI Online System to submit your application. **To complete your application, you must have previously submitted a Letter of Intent (LOI) to PCORI**. (Note that for some PFA types, LOIs must be approved by PCORI prior to the submission of an application. Refer to the PFA for further guidance.)

- 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



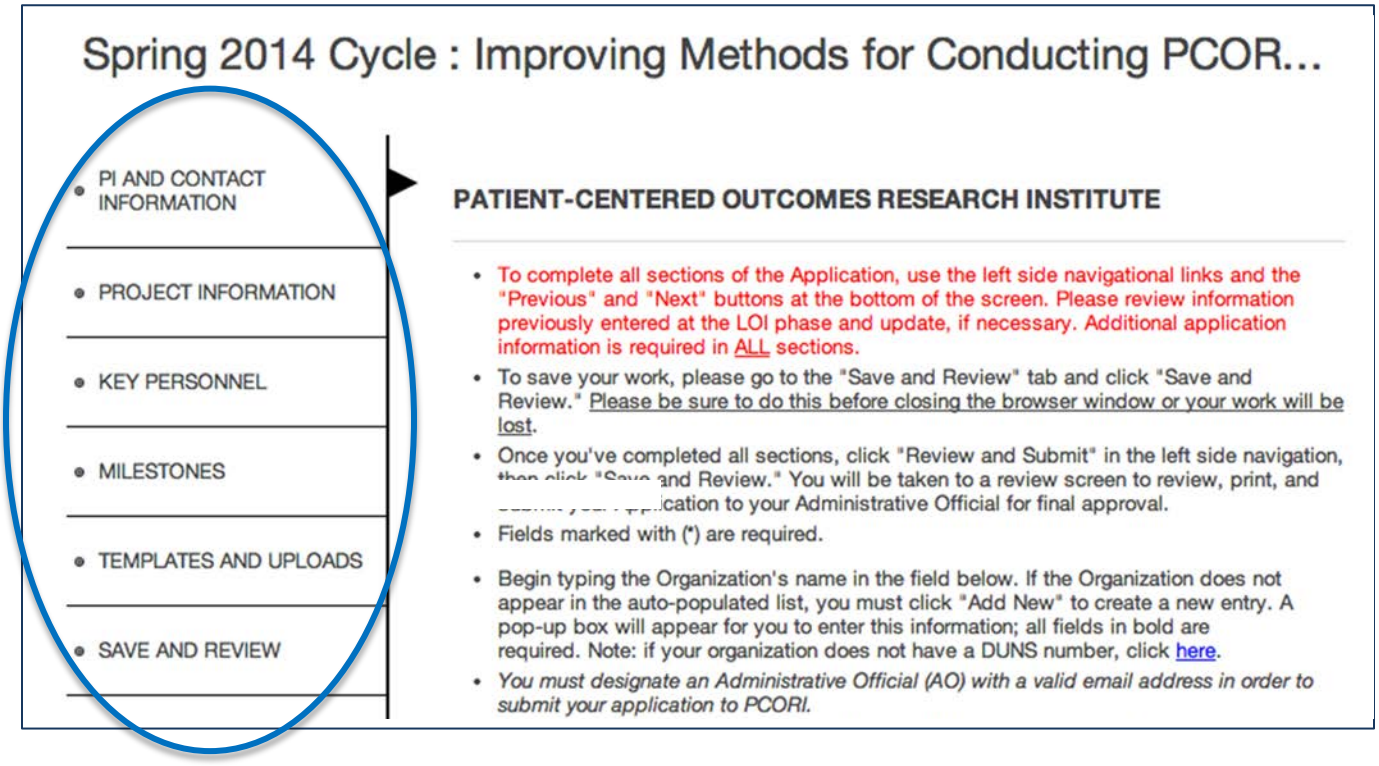
Locate Your Application

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.



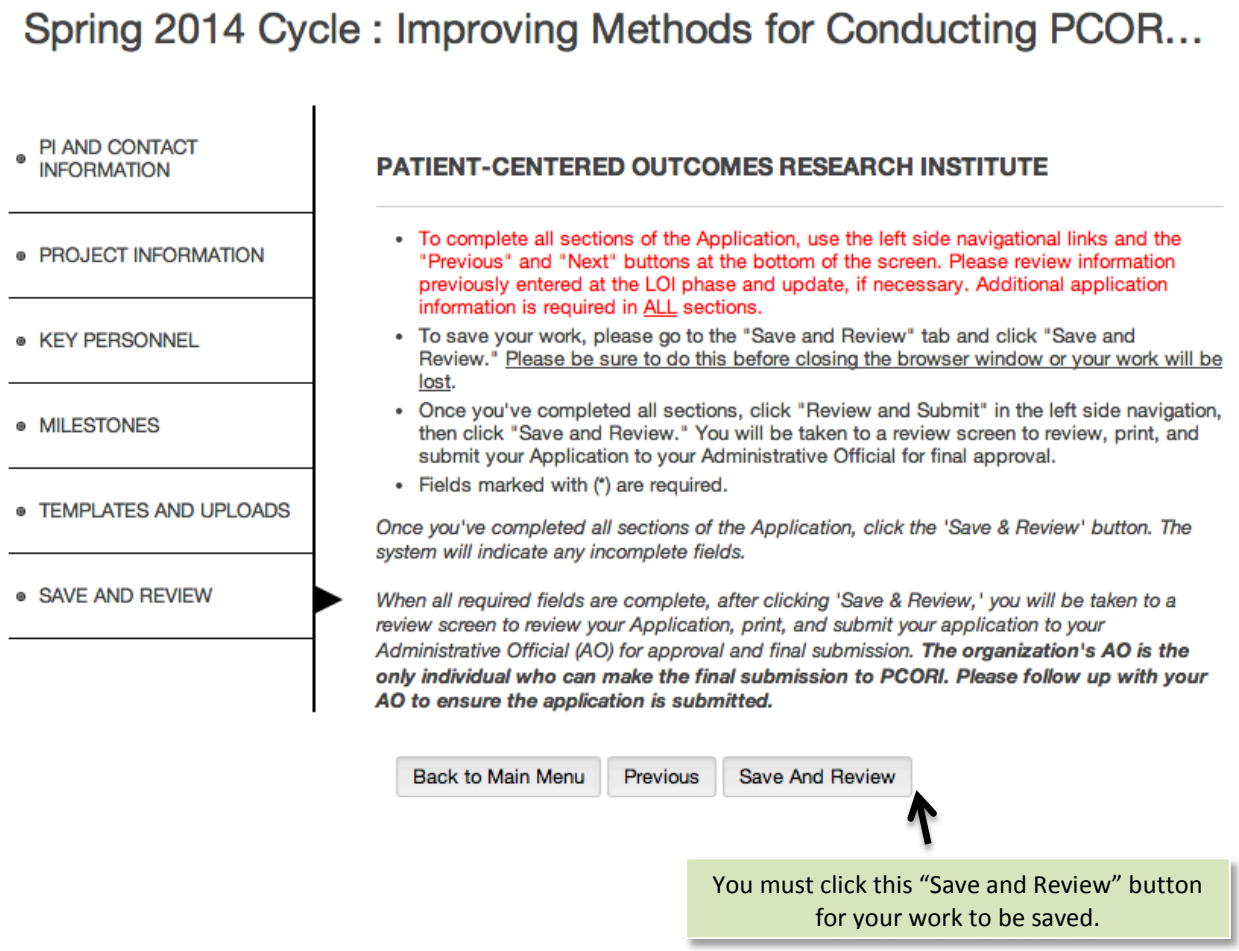
Create Your Application

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.

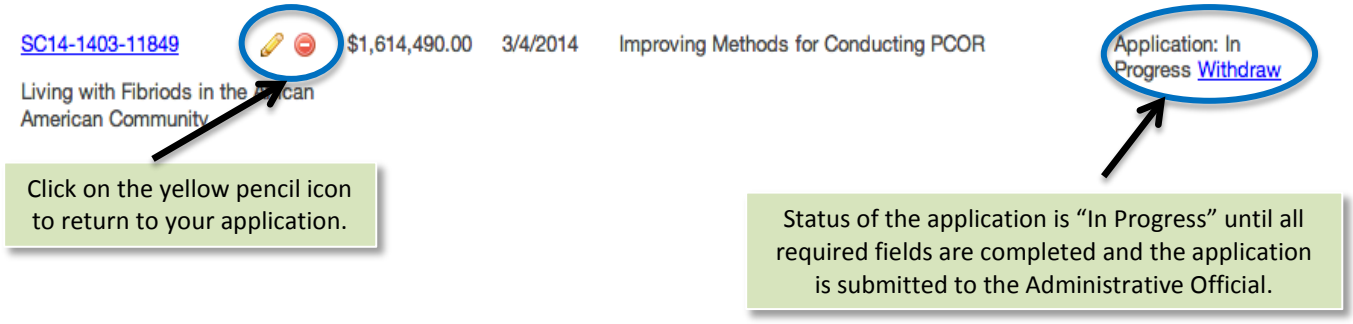


Save Your Application

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.



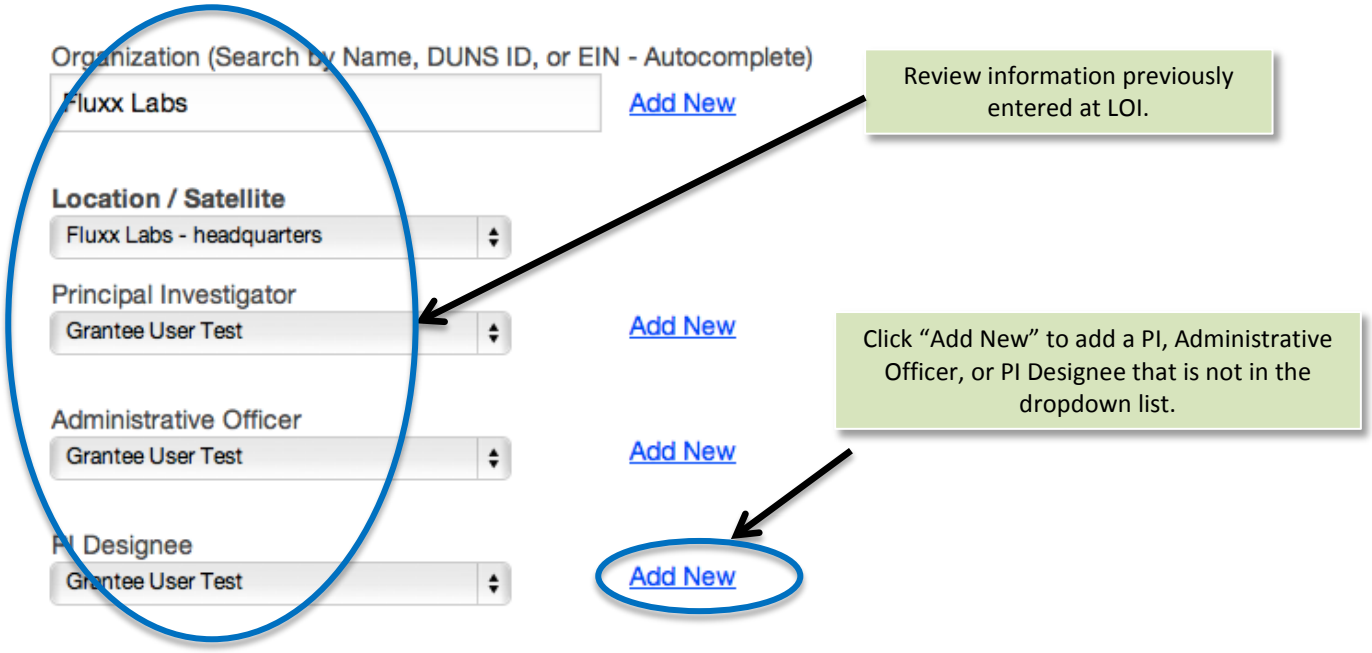
To return to a saved draft application, click on the yellow pencil icon on the landing page.



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 required for application submission. The PI and the Administrative Officer cannot be the same person.



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**

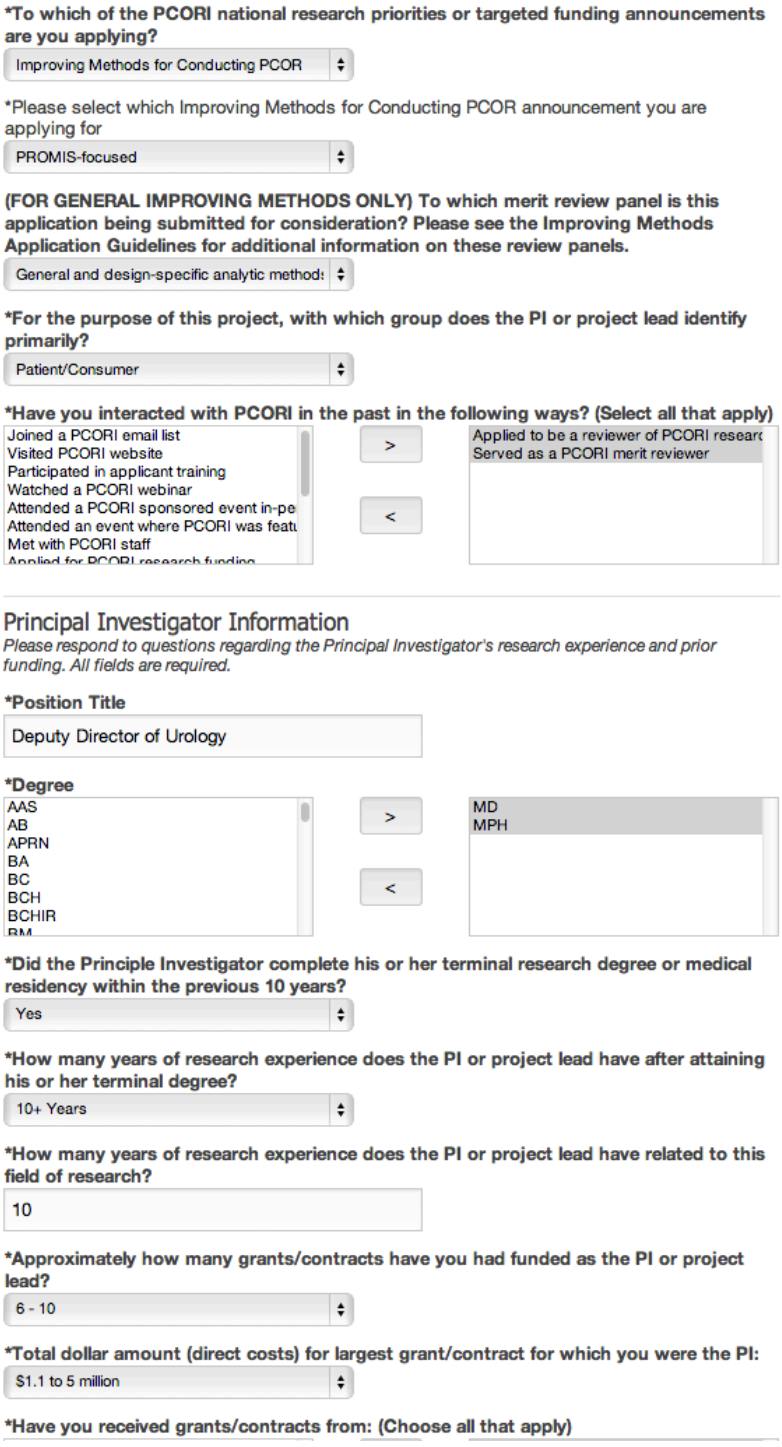
20036

***Congressional District**

3

Review Additional PI Information

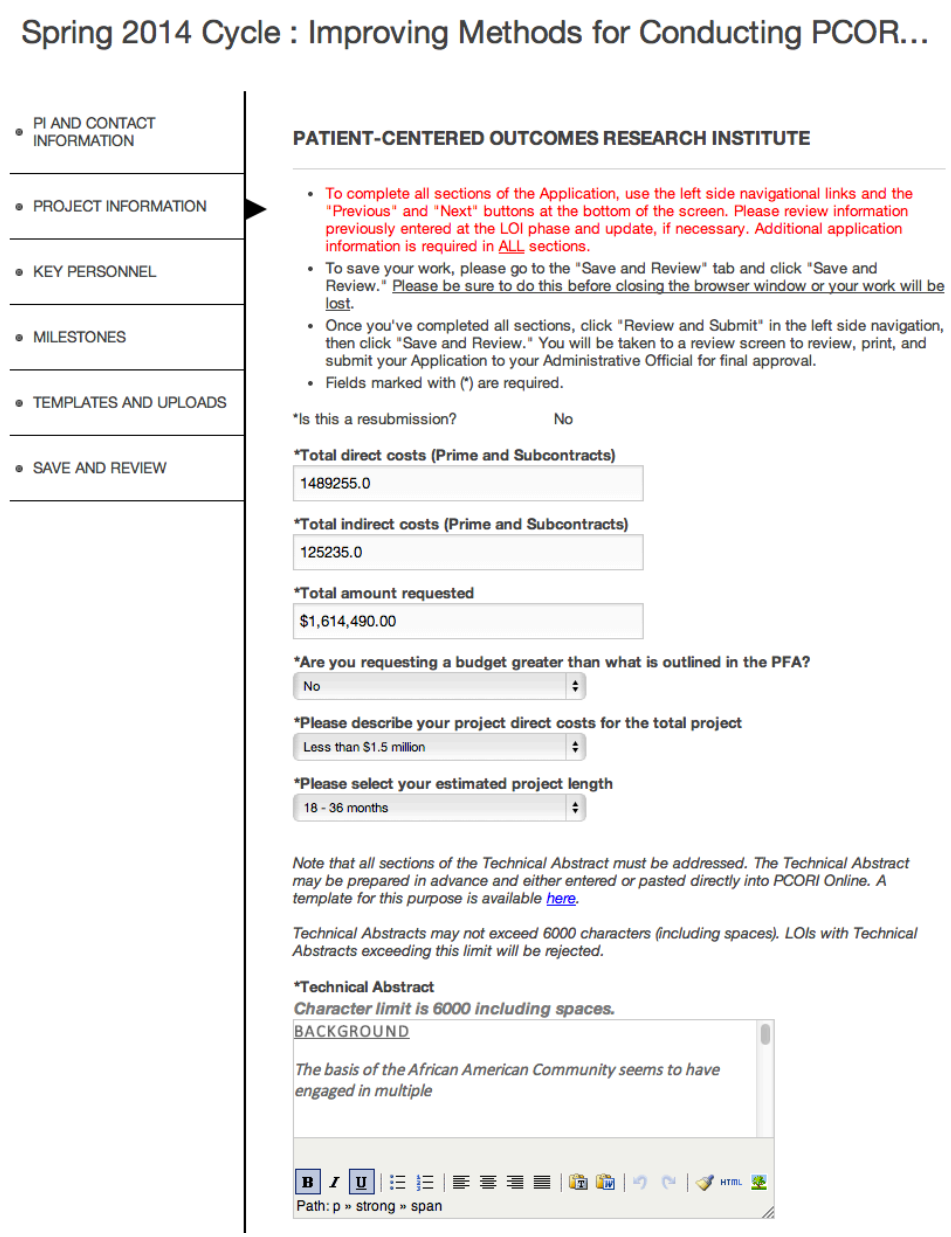
Review the Principal Investigator information entered with the LOI. You may edit the information, if needed. Use the "Next" button at the bottom of the page to continue to the next section.



Project Information

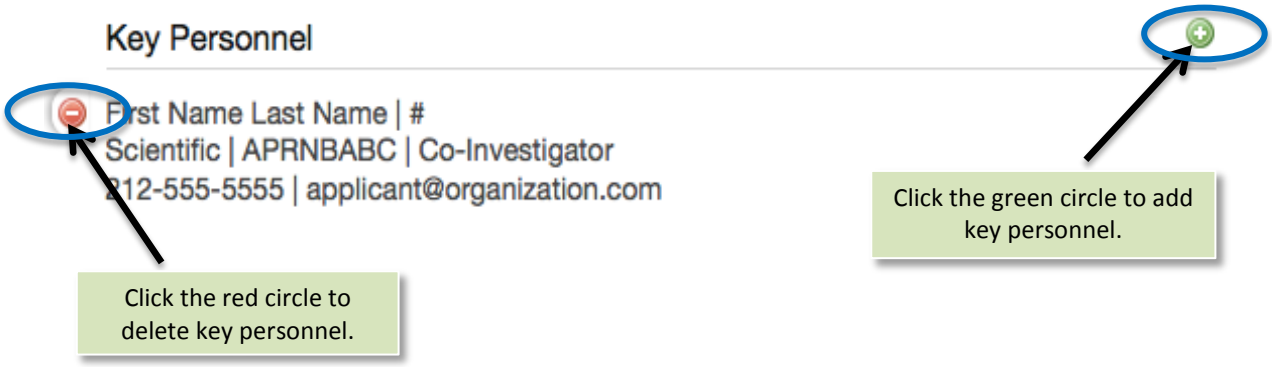
Enter additional project information.
Enter the projected start and end date of the project by clicking on the calendar icon.
Enter additional project information questions. Refer to the PFA and the Application Guidelines, found on the PCORI Funding Center, for additional guidance.

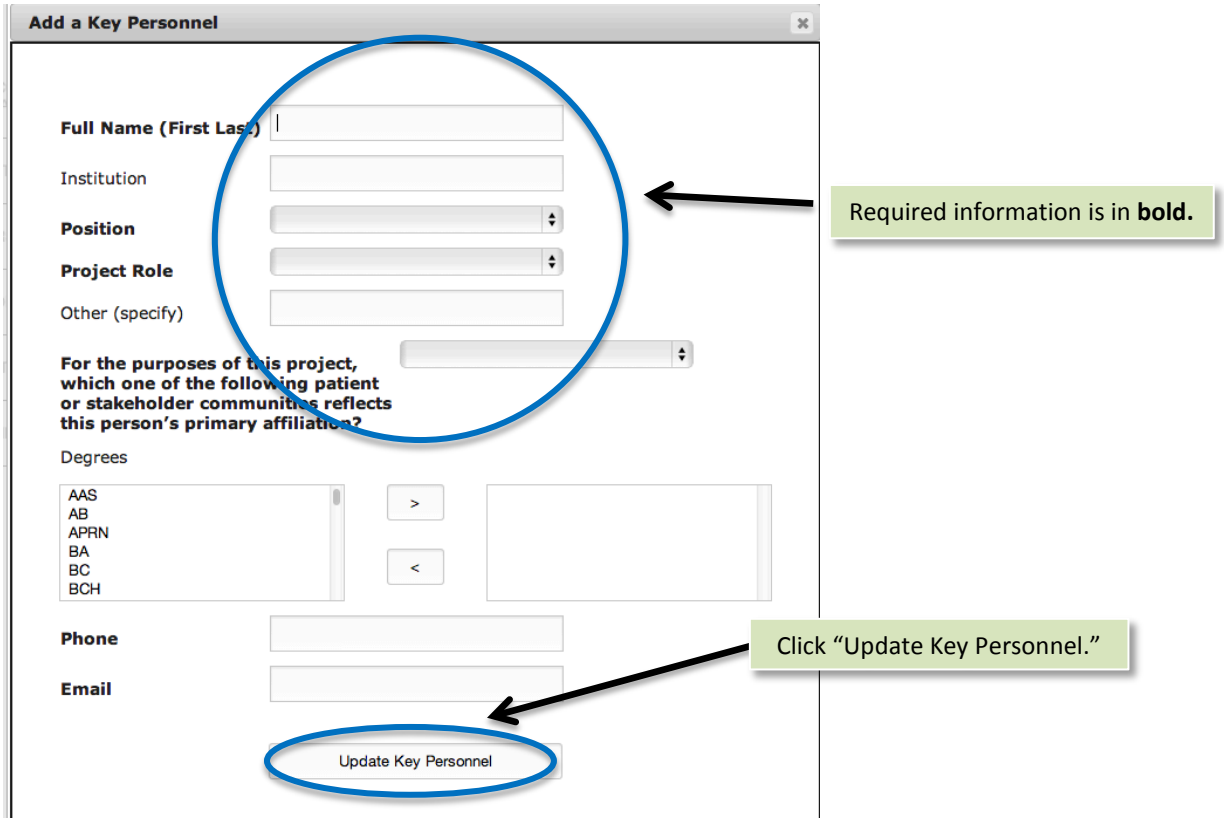
All fields are required.



Key Personnel

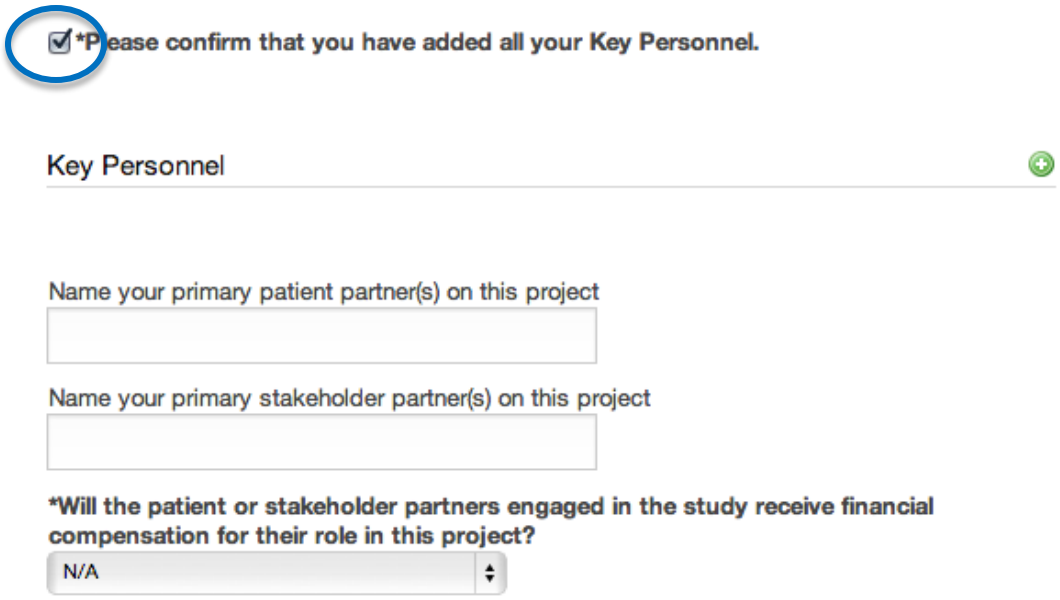
- To add key personnel: click the green plus sign, enter key personnel information, and click "Create Key Personnel."
- To remove key personnel: click the red minus sign that will appear when you hover your cursor over a name.
- **Note: After you click "Create Key Personnel" you cannot go back to edit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





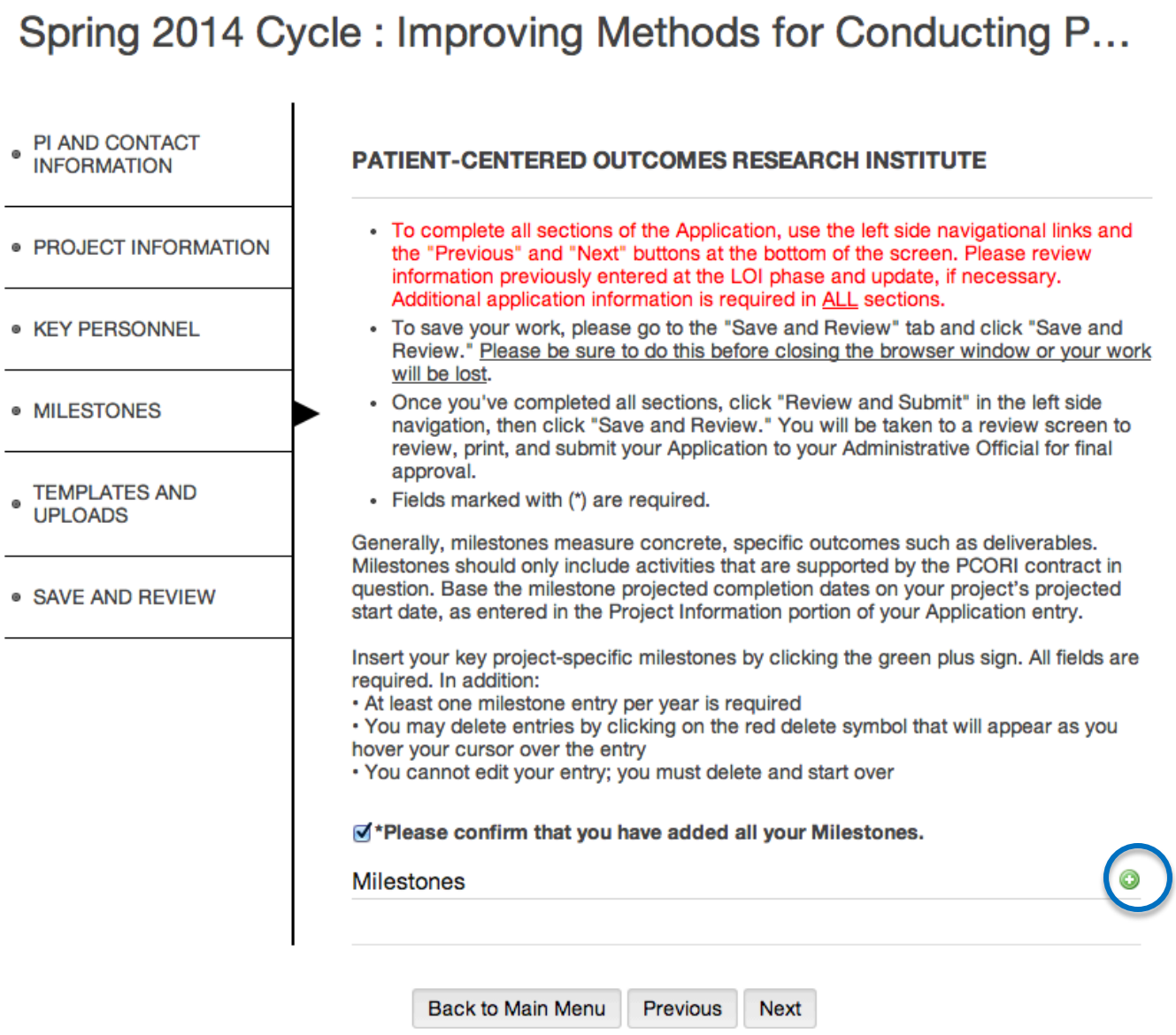
- Please confirm that you have added all Key Personnel by clicking the checkbox. You may be asked to complete additional key personnel question(s).

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



Milestones

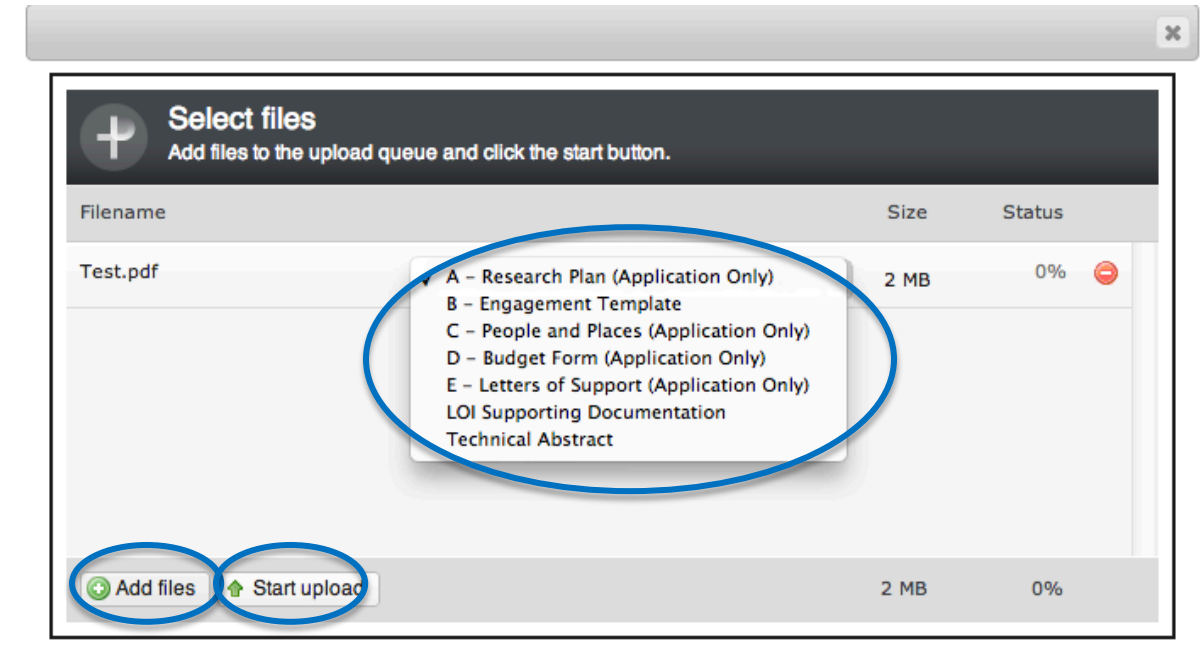
Enter project milestones by clicking on the green circle (plus sign). A popup window will appear. Generally, milestones measure concrete, specific outcomes such as deliverables. Enter milestones information, including milestone name, description, and projected completion date. You may delete milestones 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.**

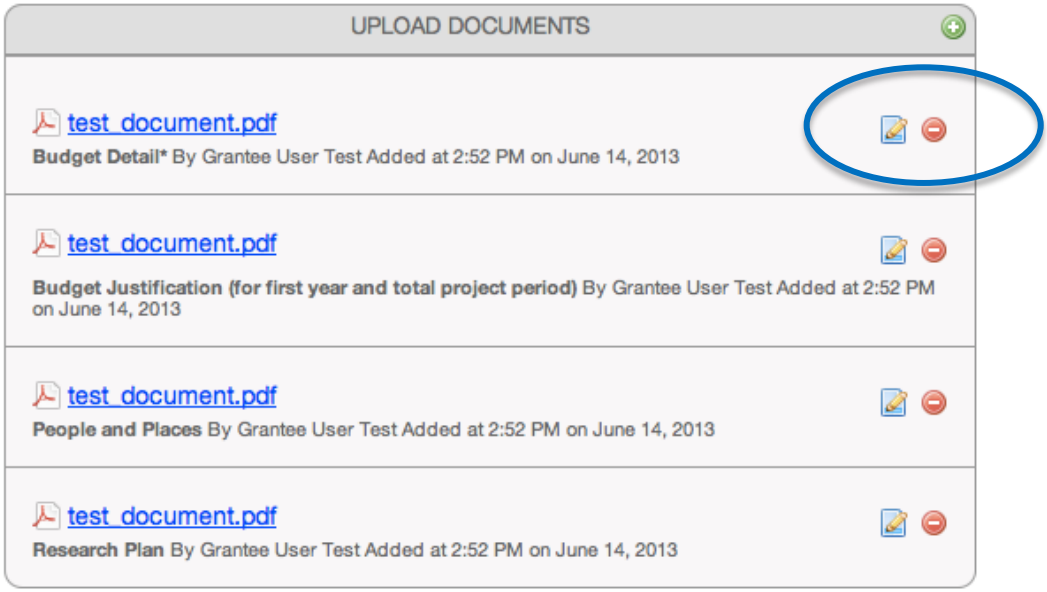


Templates and Uploads

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.

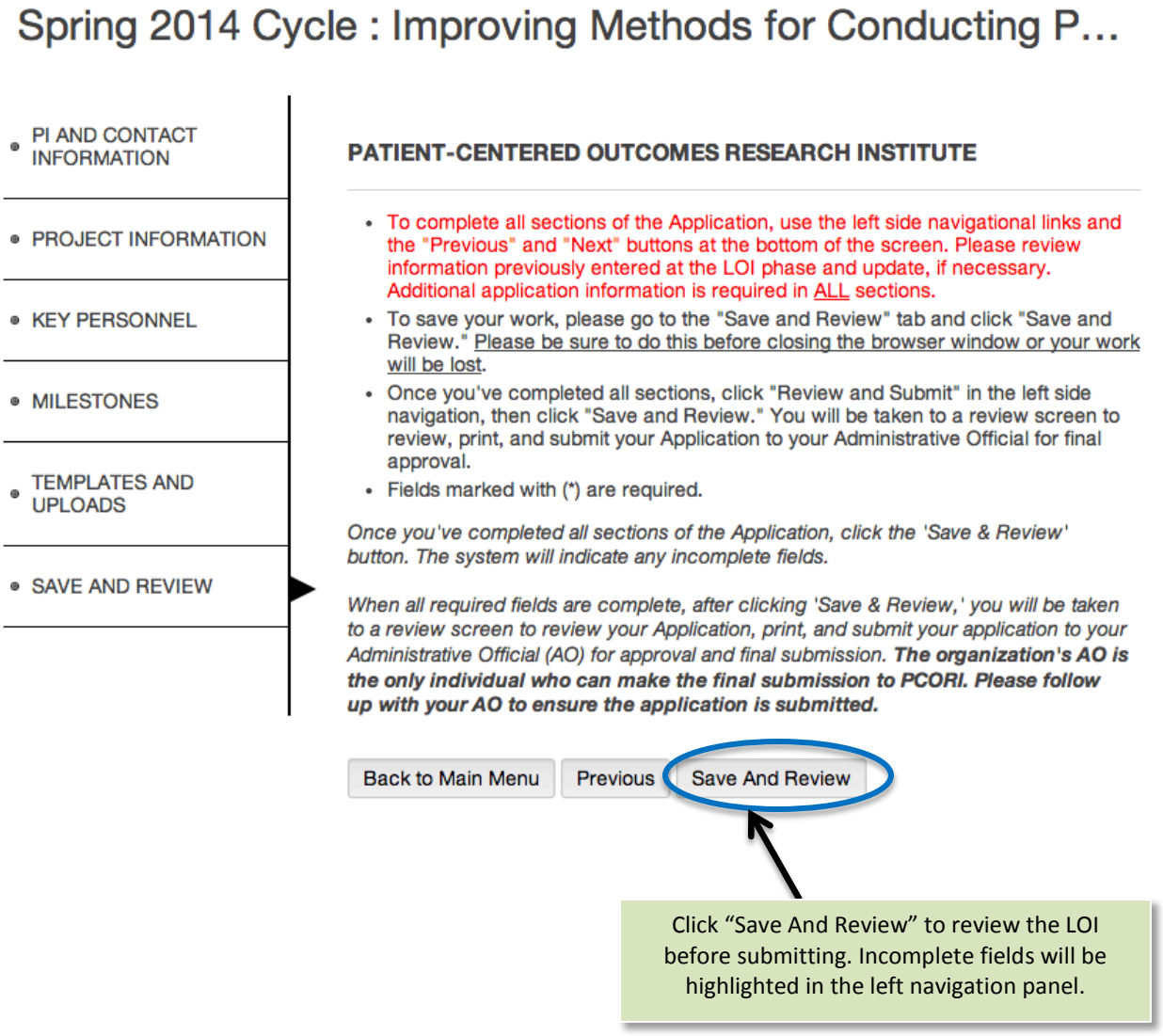

Select files
Add files to the upload queue and click the start button.
Filename
Size
Status
Test.pdf
2 MB
0%
A – Research Plan (Application Only)
B – Engagement Template
C – People and Places (Application Only)
D – Budget Form (Application Only)
E – Letters of Support (Application Only)
LOI Supporting Documentation
Technical Abstract
Add files
Start upload
2 MB
0%


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.

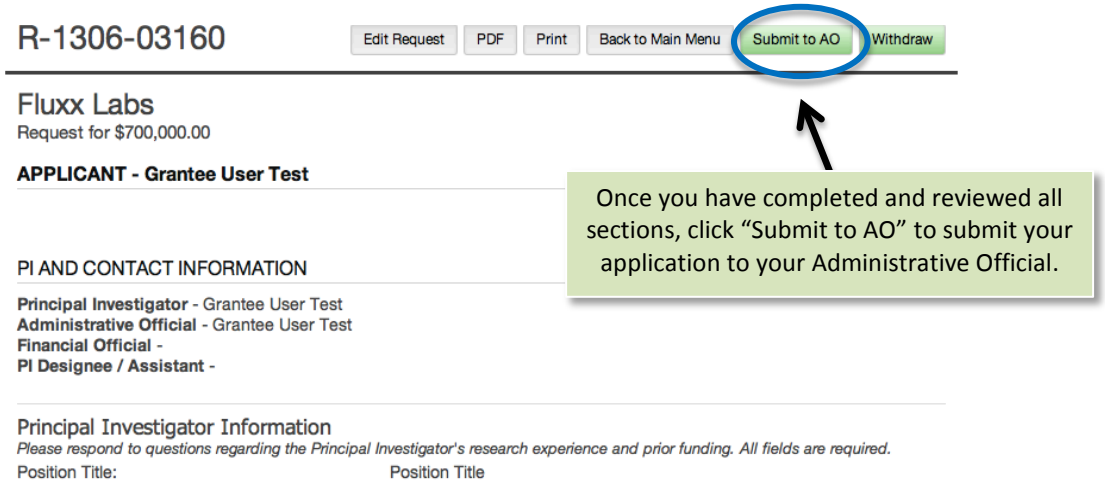
- If all required fields are complete, you will see a summary screen. From this screen, you can review, print, or save your application as a PDF.



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.

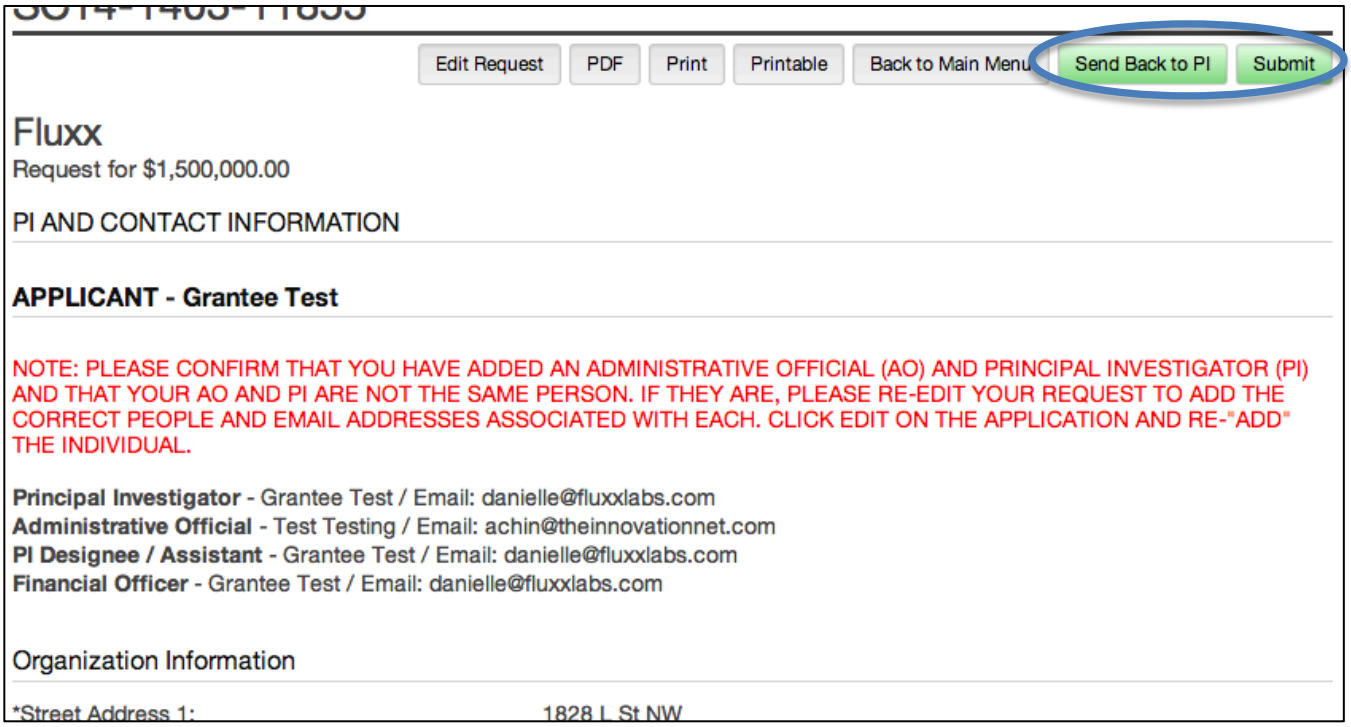
Note that only the AO may submit the application to PCORI. <u>Please contact your AO to ensure that your application was reviewed and submitted.</u>



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.