Eugene Washington PCORI Engagement Awards Initiative Notices

Online Application System User Manual: Submit an Application for an EAIN

Contents

Introduction

Applicants who would like to apply for an Engagement Award Initiative Notice (EAIN) should follow the instructions below. If you experience technical difficulties using the PCORI Engagement Awards Initiative Notice Online Application System, please contact us at ea@pcori.org or 202-370-9312.

Please note the following before you begin:

• **Remember to save your work before closing the browser window or your work will be lost.** To save your work, click "Save" at the bottom or top of the application form. You will be prompted to enter required information; enter dummy information if you are not ready to complete required fields. Incomplete fields will be highlighted in red. The system will note incomplete fields one at a time.

• **The system will time out after two hours of inactivity.** Remember to click "Save" on a frequent basis or you will be logged out and any work that is not saved will be lost.

Step 1: Log in

• Select the 'Engagement Award Initiative Notice Online Application' link from the respective EAIN Applicant Resources Section.

Overview

Published	July 22, 2014	
Summary	This Engagement Award Initiative Notice provides guidelines for funding available to support	
Applicant Resources	Engagement Award Initiative Notice Online Application Online Application System User Manual: Submit an Application for an EAIN Application Checklist Biosketch Templates Board of Directors Template Contract Service Agreement Budget Justification Template Budget Template Workplan Template	
Key Dates	Online System Opens: Applicant Town Hall Session: Application Review:	July 22, 2014 To be announced Rolling basis

You will be directed to the following page. **All fields are required**.

Contact Information

First Name: *	
Last Name: *	
Organization: *	
Email: *	
Phone: *	
Street: *	
City: *	
State: *	
Zip: *	
Country: *	
Project Name: *	

Submit

• After filling in all the fields, click the 'Submit' button and you will be directed to check your email for further instructions.

Contact Information

Thank you for providing your contact information. Check your email inbox and you will have information with instructions to log in to your online portal to submit your application to request funding through the Eugene Washington PCORI Engagement Awards program.

Online Application System: Submit an Application for an EAIN

Email Link Activation

• **Click on the link in the email you received, which will look similar to:**

Mon 7/21/2014 11:29 AM

Engagement <ea@pcori.org>
Welcome to Engagement Awards Application
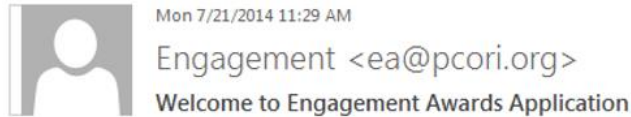
To

Hi

Welcome to Engagement Awards Application! To get started, go to https://pcori.force.com/engagement/login?c=97JmYeev6%2BFxB4OOnAIM5qgxfxRtrHAN4deX4cluVzSHvGo1lGSiPgyND1h9PLWFJ%2FIwhHaDnM8HNsHr4QJGlA8Isv3AKeA5mj2mhWPPL2UAvA%3D%3D&c=97JmYeev6%2BFxB4OOnAIM5qgxfxRtrHAN4deX4cluVzSHvGo1lGSiPgyND1h9PLWFJ%2FIwhHaDnM8HNsHr4QJGlA8Isv3AKeA5mj2mhWPPL2UAvA%3D%3D

Thanks,
PCORI

Username:
.

Log In for previous users:

• **Click on the link in the email you received**. It will direct you to the login portal for the PCORI Engagement Awards Initiative Notice Online Application System.
• Log in using your previously created username and password.
• Click "Forgot your password" to retrieve a lost password. Your username is required.

PCORI employee? Log in here

User Name

Password

Log in

☐ Remember User Name

Forgot your password? | Not a member?

Log In for new users:

• **Click on the link in the email you received**. It will direct you to the login portal for the PCORI Engagement Awards Initiative Notice Online Application System.

• Select "Not a member?". You will then be directed to create an account. **All fields are required**.

• Remember to note your username (the email you entered) and password.

• Click "Submit" when you are done.

• You will receive an email confirmation.

• Click the link to the login screen of the PCORI Engagement Awards Initiative Notice Online Application System.

• Enter the user name and password you created to login and begin your application.

PCORI employee? Log in here

User Name

Password

Log in
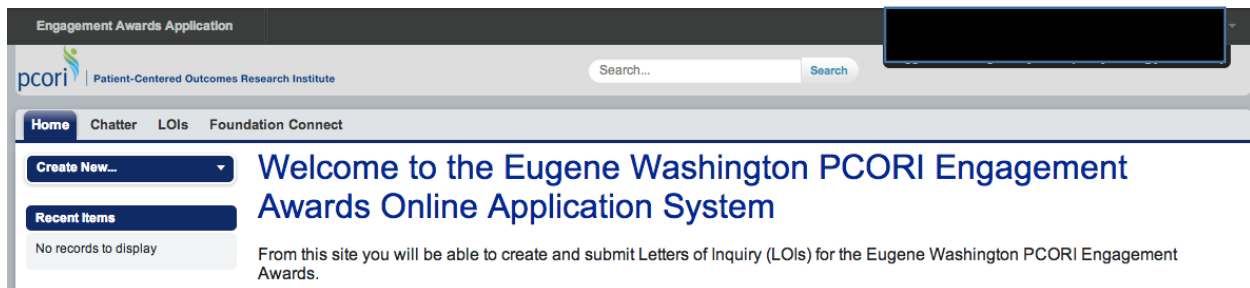
☐ Remember User Name

Forgot your password? | Not a member?

Step 2: Prepare Your EAIN Application

• Click the "Foundation Connect" link in the top navigation bar.
- Previous Users will see this page:

- New users will see this page:

• Then click 'Grantee Dashboard' under 'Grantee Links.'

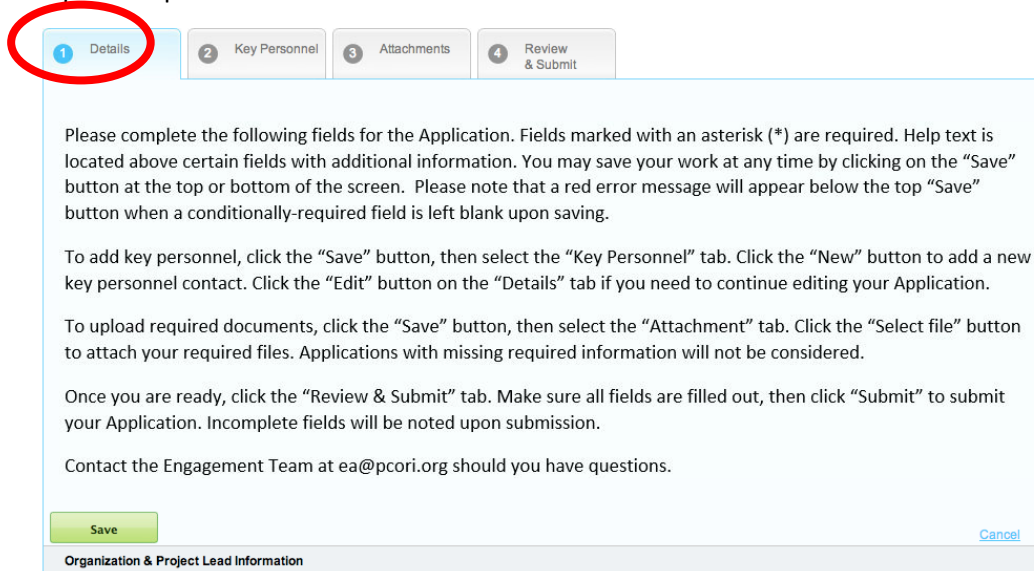Online Application System: Submit an Application for an EAIN

• You will be taken to your Dashboard, where you will see any applications in progress.
• Click on the paper and pencil "Edit" icon to begin your application.

Details

• You will be taken to the "Details" tab. **All fields marked with an asterisk (*) are required.**
• Click "Save" at the bottom or the top of the screen to save your work as you go. Saving your work will prompt you to enter required information; enter placeholder text/information if you are not ready to complete required fields.

• In the **Project Summary** section, additional instructions appear above some questions.
- • For PPPLN EAIN please see supplemental application instructions in the "PPPLN Dissemination and Implementation EAIN Application Template" of the funding announcement

• For larger textboxes, <mark>character limits</mark> (including spaces) are noted in instructions.

- For PPPLN EAIN please prepare applications in word and copy/paste into online application form; follow word limits prescribed in PPPLN EAIN

- To identify your application as a response to an EAIN, in the **Project Information** section under the details tab, please select "<mark>Yes" in the Are you responding to an initiative announcement? Dropdown</mark>
- Then select the appropriate choice

Authorizations

• Certify that you are authorized by your organization to submit the application to PCORI.
• Click "Save," located at the bottom and the top of the form, to save your work in order to move to the next tab of the application. Saving your work will prompt you to enter required information; enter dummy information if you are not ready to complete required fields.
• Incomplete fields will be highlighted in red. The system will note incomplete fields one at a time.

Key Personnel

• Click "New" to enter a new Key Personnel.
• Limit your entries to five Key Personnel, *excluding* the Project Lead.

• Enter Key Personnel fields. A red bar indicates required fields.

• Click the "Save" button when finished. <mark>Any incomplete fields will be highlighted in red</mark>.

• After saving your Key Personnel entry, you will be taken back to the Key Personnel main page. You may <mark>edit your Key Personnel entry by clicking on the paper and pencil "Edit" icon</mark>. You may delete your Key Personnel entry by clicking on the "X" icon.
• When finished entering all necessary Key Personnel, click "Continue" to be taken to the next tab.

Attachments

• Upload required attachments by clicking on "Select File" and following the prompts.
• Note that the system will rename your file as follows: document type, year, original document name.
• Required templates are posted in the Application Resources section on Eugene Washington PCORI Engagement Awards.

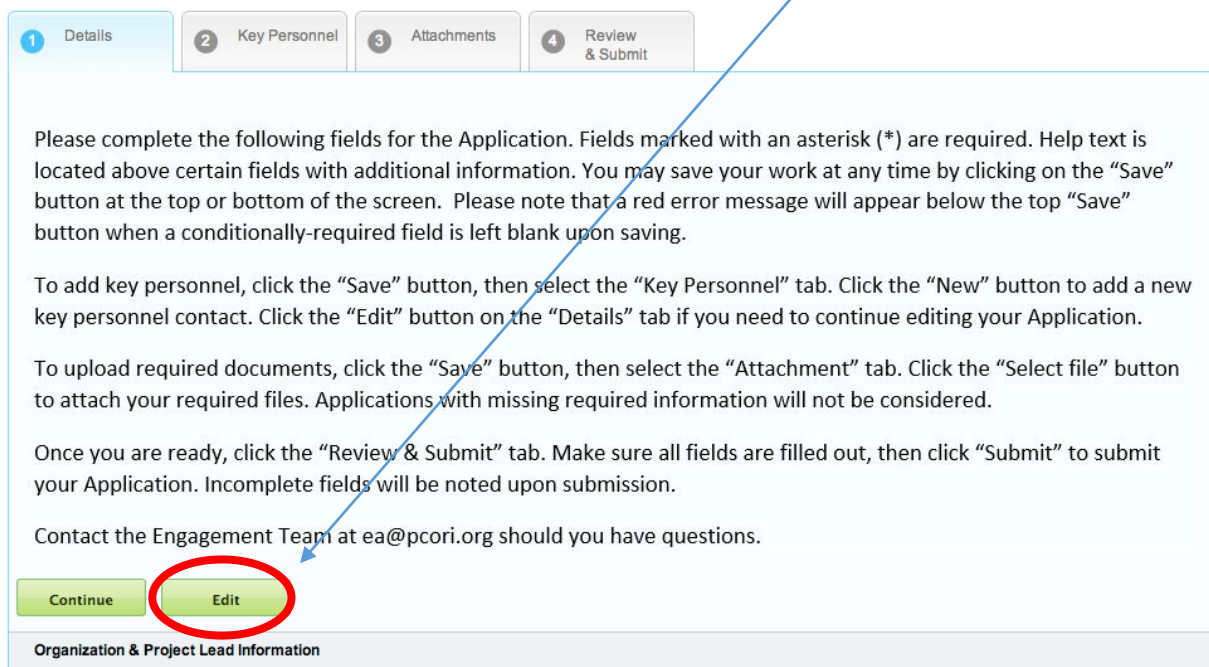When finished uploading all required documents, click "Continue" to proceed.

| 1 | Details | 2 | Key Personnel | 3 | Attachments | 4 | Review & Submit |

Required templates can be found in the Application Resources section on the Eugene Washington PCORI Engagement Awards page.

Continue

Please submit a **financial statement document**. Please note that the file will be automatically renamed. (REQUIRED)

Select File...

Please submit a **operating expense budget document**. Please note that the file will be automatically renamed. (REQUIRED)

Select File...

Please submit a **Board of Directors document**. Please note that the file will be automatically renamed. (REQUIRED)

Select File...

Please submit a **Workplan document**. Please note that the file will be automatically renamed. (REQUIRED)

# Save and Return to Your EAIN Application- Navigating the Dashboard

You can save and return to continue working on your application at any time.

• To save your work, click "Save" at the bottom or the top of the EAIN Application form. **Please be sure to do this before closing the browser window or your work will be lost.**

• You will be prompted to enter required information; **enter dummy information if you are not ready to complete required fields.**

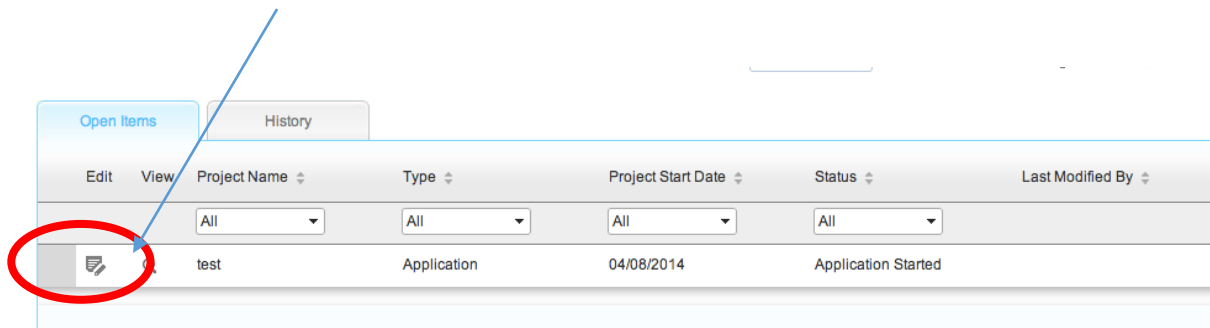• After saving your work, you will be taken to a summary screen; click "Edit" to continue working on your application.

• Once you have successfully saved, you may leave the system and come back to your work.
• From the Foundation Connect tab (see Step 2, above), click on the "Grantee Dashboard" link.
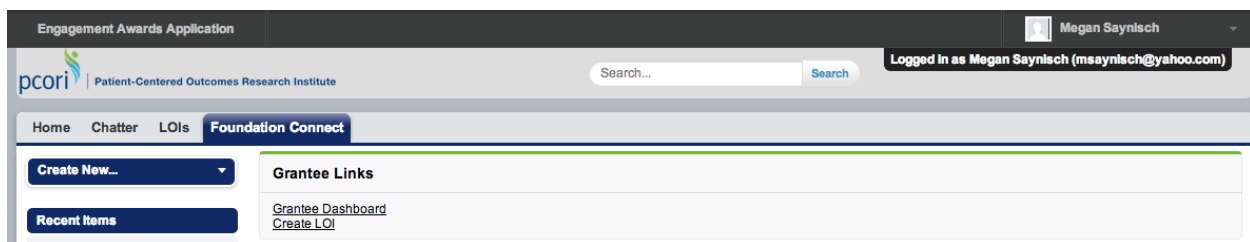
• You will be taken to the "Open Items" tab on your Dashboard, where you can view applications in progress.
• You may click on the "History" tab to view submitted LOIs and applications.
• Click on the "My Submissions" link in the top right navigation to be taken to your Dashboard from the EAIN Application screen.
• <mark>Click on the pencil and paper "Edit" icon to be taken back to your incomplete EAIN</mark> application.
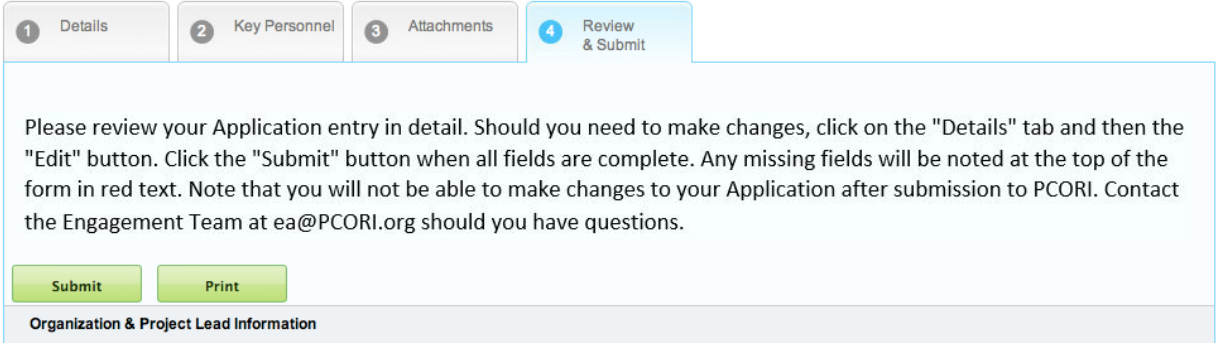
Step 3: Review and Submit Your EAIN Application

Once you've completed all sections on each tab, you are ready to submit your EAIN application.

• Review your application completely before submission. You will not be able to make any changes after it is successfully submitted.
• To submit your application to PCORI, click on the "Review and Submit" tab.
• You will be taken to a summary screen. From this screen, you can review your submission and print your application. **Note that once the application is submitted to PCORI, you will no longer be able to make changes.**
• Incomplete fields will be highlighted in red. The system will note incomplete fields one at a time.
• To make changes to your application, click the "Details" tab to be taken back to the edit view.
• To submit your application to PCORI, click "Submit."

Resources and Contact Information

• Please refer to the Application Resources section in the Engagement Award Initiative Notice you are responding to for required templates. You can access each EAIN from the PCORI Engagement Awards page.

• Questions? Contact us at ea@pcori.org or 202-370-9312.