



## **Eugene Washington PCORI Engagement Awards Initiative Notices**

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



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## 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](mailto: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	<a href="#">Engagement Award Initiative Notice Online Application</a> <a href="#">Online Application System User Manual: Submit an Application for an EAIN</a> <a href="#">Application Checklist</a> <a href="#">Biosketch Templates</a> <a href="#">Board of Directors Template</a> <a href="#">Contract Service Agreement</a> <a href="#">Budget Justification Template</a> <a href="#">Budget Template</a> <a href="#">Workplan Template</a>	
Key Dates	Online System Opens:	July 22, 2014
	Applicant Town Hall Session:	To be announced
	Application Review:	Rolling basis



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



Patient-Centered Outcomes Research Institute

## Contact Information

First Name: \*

Last Name: \*

Organization: \*

Email: \*

Phone: \*

Street: \*

City: \*

State: \*

Zip: \*

Country: \*

Project Name: \*

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



Patient-Centered Outcomes Research Institute

## Contact Information

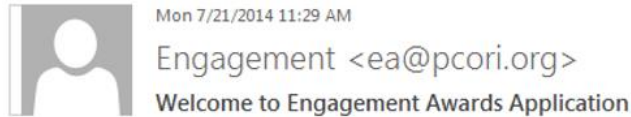
Thank you for providing your contact information.

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.



## Email Link Activation

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



To

Hi

Welcome to Engagement Awards Application! To get started, go to <https://pcori.force.com/engagement/login?c=97JmYeev6%2BFxB4OOnAIM5qgxfxRtrHAN4deX4cluVzSHvGo1GSIpGyND1h9PLWFJ%2FlwhHaDnM8HNsHr4QJGIA8Isv3AKeA5mj2mhWPPL2UAvA%3D%3D&c=97JmYeev6%2BFxB4OOnAIM5qgxfxRtrHAN4deX4cluVzSHvGo1GSIpGyND1h9PLWFJ%2FlwhHaDnM8HNsHr4QJGIA8Isv3AKeA5mj2mhWPPL2UAvA%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  
PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

PCORI employee? [Log in here](#)

User Name

Password

Remember User Name

[Forgot your password? | Not a member?](#)

Online Application System: Submit an Application for an EAIN



### 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.**

PCORI employee? [Log in here](#)

User Name

Password

[Log in](#)

Remember User Name

[Forgot your password?](#) | [Not a member?](#)

First Name

Last Name

Nickname

Email

Password

Confirm Password


[Submit](#)

- Remember to note your username (the email you entered) and password.
- Click “Submit” when you are done.

Online Application System: Submit an Application for an EAIN



- 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](#)

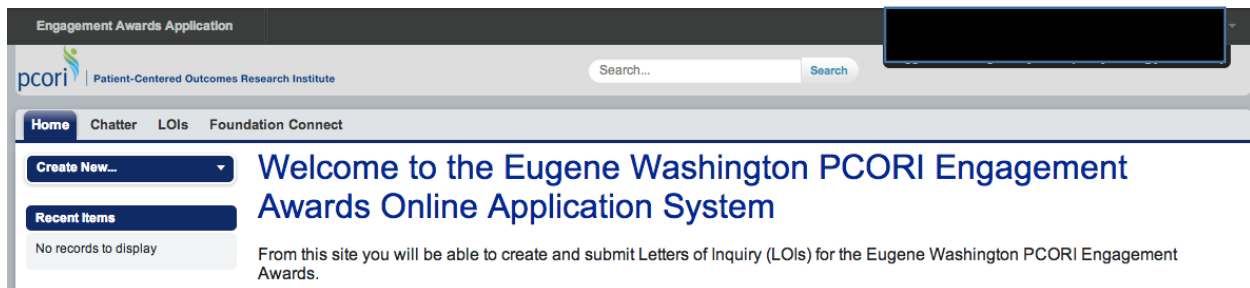
Remember User Name

[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:



Engagement Awards Application

pcori | Patient-Centered Outcomes Research Institute

Search... Search

Home Chatter LOIs Foundation Connect

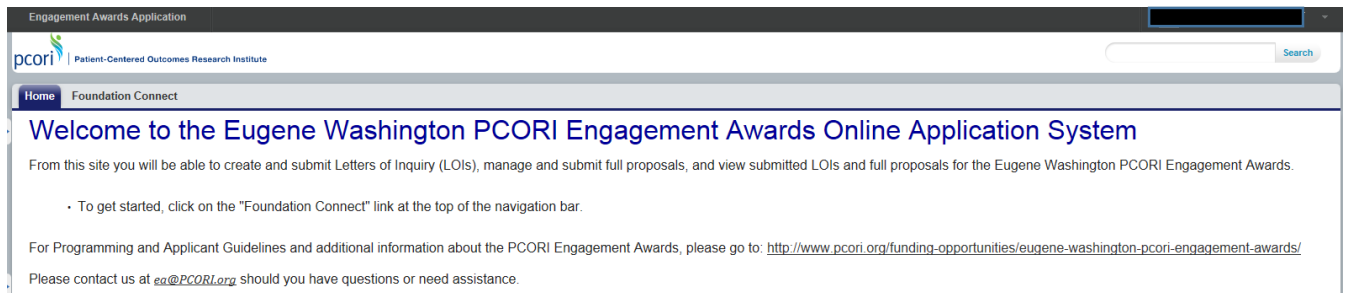
Create New... Recent Items

No records to display

### Welcome to the Eugene Washington PCORI Engagement Awards Online Application System

From this site you will be able to create and submit Letters of Inquiry (LOIs) for the Eugene Washington PCORI Engagement Awards.

- New users will see this page:



Engagement Awards Application

pcori | Patient-Centered Outcomes Research Institute

Search Search

Home Foundation Connect

### Welcome to the Eugene Washington PCORI Engagement Awards Online Application System

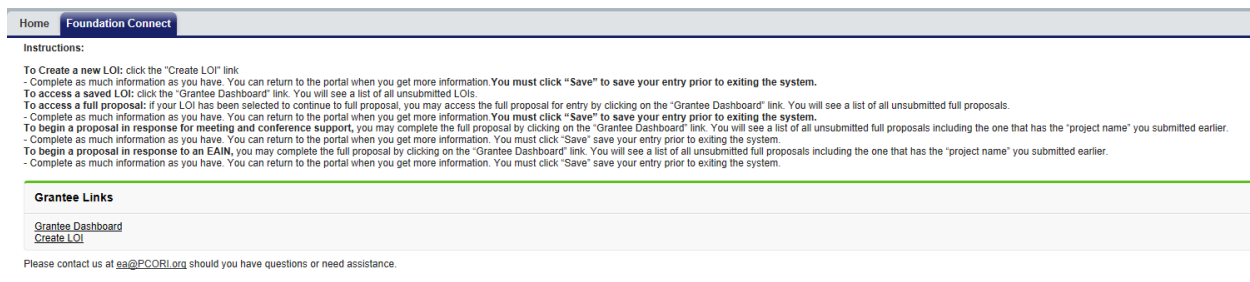
From this site you will be able to create and submit Letters of Inquiry (LOIs), manage and submit full proposals, and view submitted LOIs and full proposals for the Eugene Washington PCORI Engagement Awards.

- To get started, click on the “Foundation Connect” link at the top of the navigation bar.

For Programming and Applicant Guidelines and additional information about the PCORI Engagement Awards, please go to: <http://www.pcori.org/funding-opportunities/eugene-washington-pcori-engagement-awards/>

Please contact us at [ea@PCORL.org](mailto:ea@PCORL.org) should you have questions or need assistance.

- Then click ‘Grantee Dashboard’ under ‘Grantee Links.’



Home Foundation Connect

Instructions:

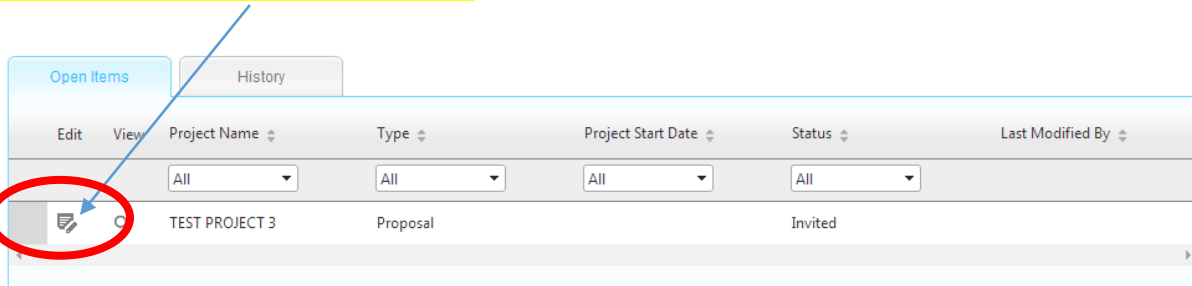
- To create a new LOI: click the “Create LOI” link
- Complete as much information as you have. You can return to the portal when you get more information. You must click “Save” to save your entry prior to exiting the system.
- To access a saved LOI: click the “Grantee Dashboard” link. You will see a list of all unsubmitted LOIs.
- To access a full proposal: if your LOI has been selected to continue to full proposal, you may access the full proposal for entry by clicking on the “Grantee Dashboard” link. You will see a list of all unsubmitted full proposals.
- Complete as much information as you have. You can return to the portal when you get more information. You must click “Save” to save your entry prior to exiting the system.
- To begin a proposal in response for meeting and conference support, you may complete the full proposal by clicking on the “Grantee Dashboard” link. You will see a list of all unsubmitted full proposals including the one that has the “project name” you submitted earlier.
- Complete as much information as you have. You can return to the portal when you get more information. You must click “Save” save your entry prior to exiting the system.
- To begin a proposal in response to an EAIN, you may complete the full proposal by clicking on the “Grantee Dashboard” link. You will see a list of all unsubmitted full proposals including the one that has the “project name” you submitted earlier.
- Complete as much information as you have. You can return to the portal when you get more information. You must click “Save” save your entry prior to exiting the system.


**Grantee Links**

[Grantee Dashboard](#)  
[Create LOI](#)

Please contact us at [ea@PCORI.org](mailto:ea@PCORI.org) should you have questions or need assistance.

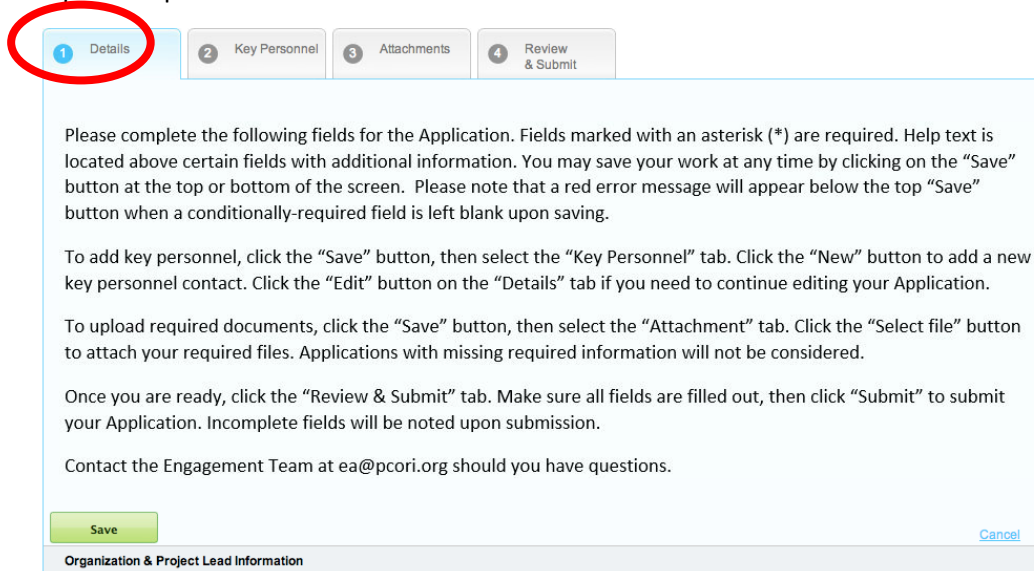
- You will be taken to your Dashboard, where you will see any applications in progress.
- Click on the paper and pencil “Edit” icon to begin your application.



Edit	View	Project Name	Type	Project Start Date	Status	Last Modified By
		All	All	All	All	
		TEST PROJECT 3	Proposal		Invited	

## 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.



1 Details 2 Key Personnel 3 Attachments 4 Review & Submit

Please complete the following fields for the Application. Fields marked with an asterisk (\*) are required. Help text is located above certain fields with additional information. You may save your work at any time by clicking on the “Save” button at the top or bottom of the screen. Please note that a red error message will appear below the top “Save” button when a conditionally-required field is left blank upon saving.

To add key personnel, click the “Save” button, then select the “Key Personnel” tab. Click the “New” button to add a new key personnel contact. Click the “Edit” button on the “Details” tab if you need to continue editing your Application.

To upload required documents, click the “Save” button, then select the “Attachment” tab. Click the “Select file” button to attach your required files. Applications with missing required information will not be considered.

Once you are ready, click the “Review & Submit” tab. Make sure all fields are filled out, then click “Submit” to submit your Application. Incomplete fields will be noted upon submission.

Contact the Engagement Team at ea@pcori.org should you have questions.

Save Cancel

Organization & Project Lead Information

- 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, **character limits** (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

**Project Summary**

Project Name

State the problem or question the project is designed to address. (1,000 Character Limit)

Background\*

Are you proposing a solution to this problem?

If yes, explain the proposed solution. Explain why it is believed that this solution will work, and be better than previous solutions. Describe how the solution is achieved (designed and implemented) or is at least achievable. (1000 character limit)

If yes, explain the proposed solution:

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

**Project Information**

Choose one, based on the organization's priorities and PCORI's Engagement Award program guidelines.

Engagement Type Award for Application\*

If your proposal spans more than one Engagement Award type, please explain:

**Are you responding to an initiative announcement?\*** Yes

If Yes, which initiative?

Is this a previously existing project that has been funded by others?

If yes, describe funders and explain:

## 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.

**Authorizations**

I certify that I am authorized by my organization to submit this application to PCORI.\*

Save
Cancel

## Key Personnel

- Click “New” to enter a new Key Personnel.
- Limit your entries to five Key Personnel, *excluding* the Project Lead.

1 Details

2 Key Personnel

3 Attachments

4 Review & Submit

Continue

**Key Personnel** New

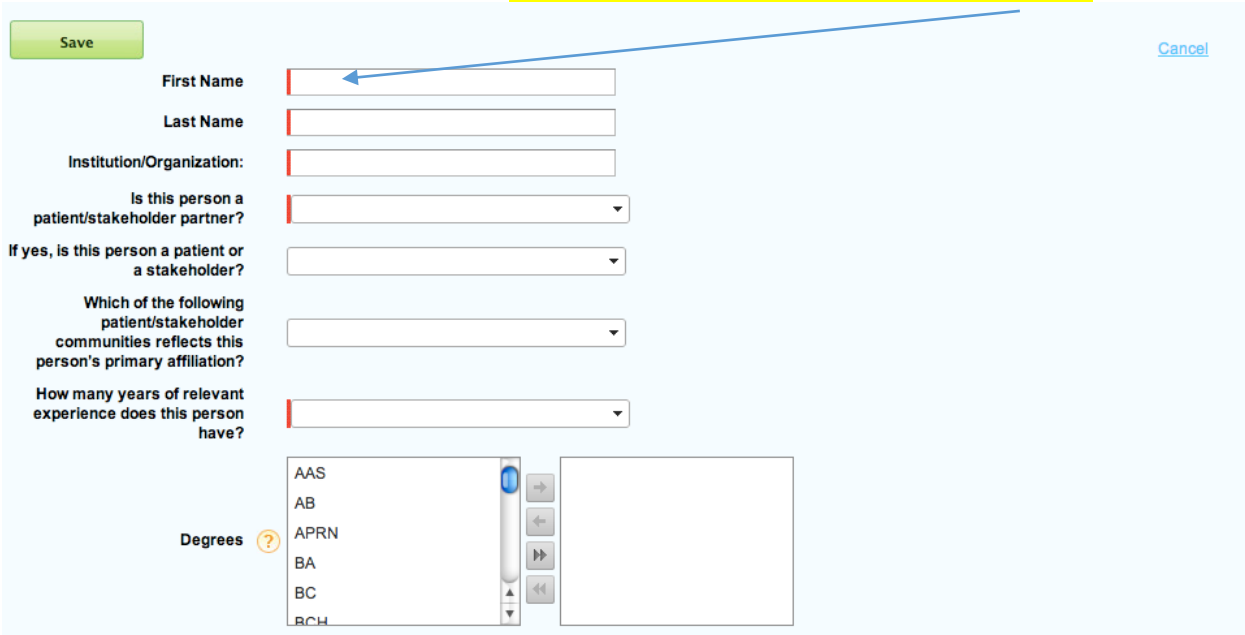
To add a new Key Personnel, click the “New” button. Limit your Key Personnel entries to 5, not including the Project Lead. You may edit your Key Personnel entries by clicking on the paper and pencil icon below. Click the magnifying glass icon to view your Key Personnel entry. Click the “X” icon to delete your entry. To continue to the next tab of the application, click “Continue.”

First Name	Last Name	Institution or Org	Primary Affiliation	Patient or Stakeholder or Partner	Patient or Stakeholder	Relevant Experience
------------	-----------	--------------------	---------------------	-----------------------------------	------------------------	---------------------

Continue

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

- Click the “Save” button when finished. Any incomplete fields will be highlighted in red.



Save Cancel

First Name

Last Name

Institution/Organization:

Is this person a patient/stakeholder partner?

If yes, is this person a patient or a stakeholder?

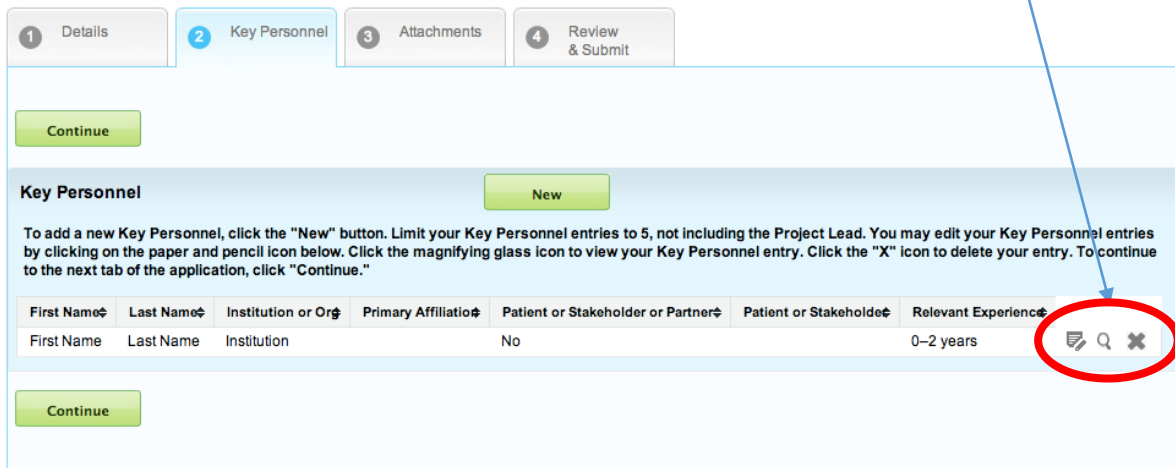
Which of the following patient/stakeholder communities reflects this person's primary affiliation?

How many years of relevant experience does this person have?

Degrees

- AAS
- AB
- APRN
- BA
- BC
- BCH

- After saving your Key Personnel entry, you will be taken back to the Key Personnel main page. You may edit your Key Personnel entry by clicking on the paper and pencil “Edit” icon. 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.






1 Details 2 Key Personnel 3 Attachments 4 Review & Submit

Continue

**Key Personnel** New

To add a new Key Personnel, click the “New” button. Limit your Key Personnel entries to 5, not including the Project Lead. You may edit your Key Personnel entries by clicking on the paper and pencil icon below. Click the magnifying glass icon to view your Key Personnel entry. Click the “X” icon to delete your entry. To continue to the next tab of the application, click “Continue.”

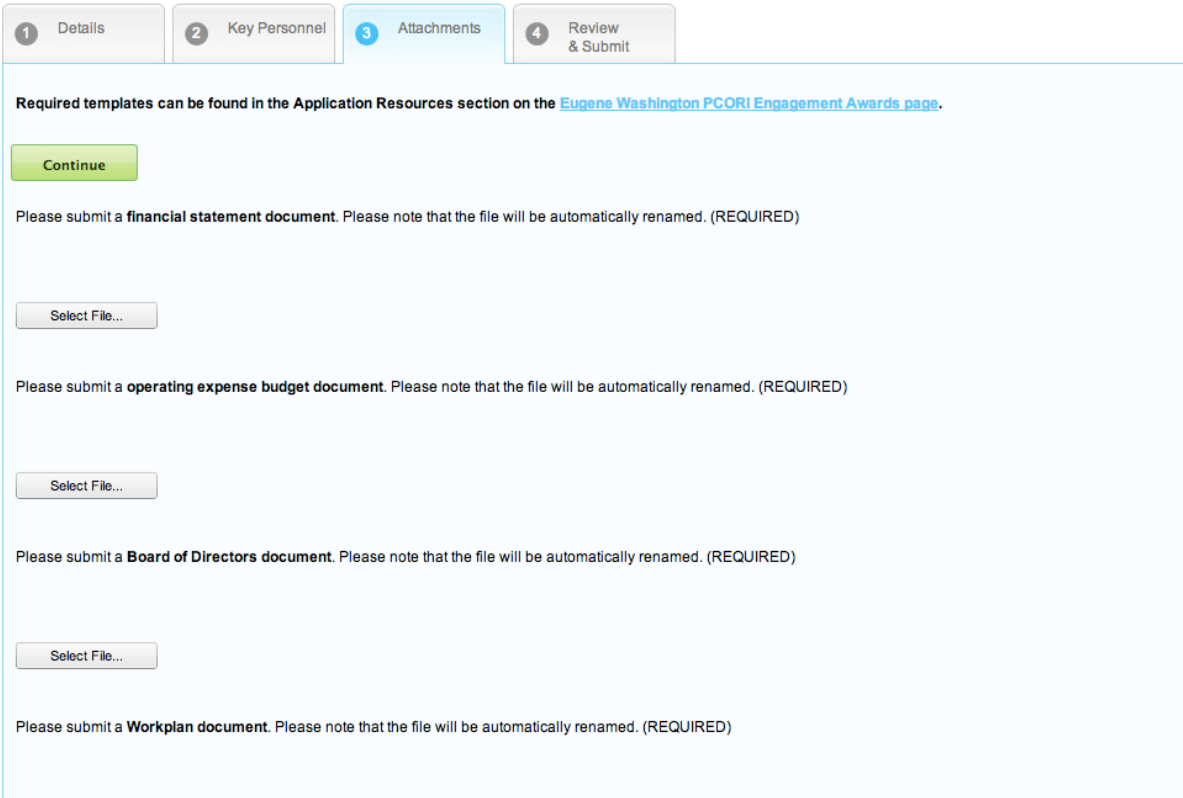
First Name	Last Name	Institution or Org	Primary Affiliation	Patient or Stakeholder or Partner	Patient or Stakeholder	Relevant Experience	
First Name	Last Name	Institution		No		0-2 years	  

Continue

## 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.

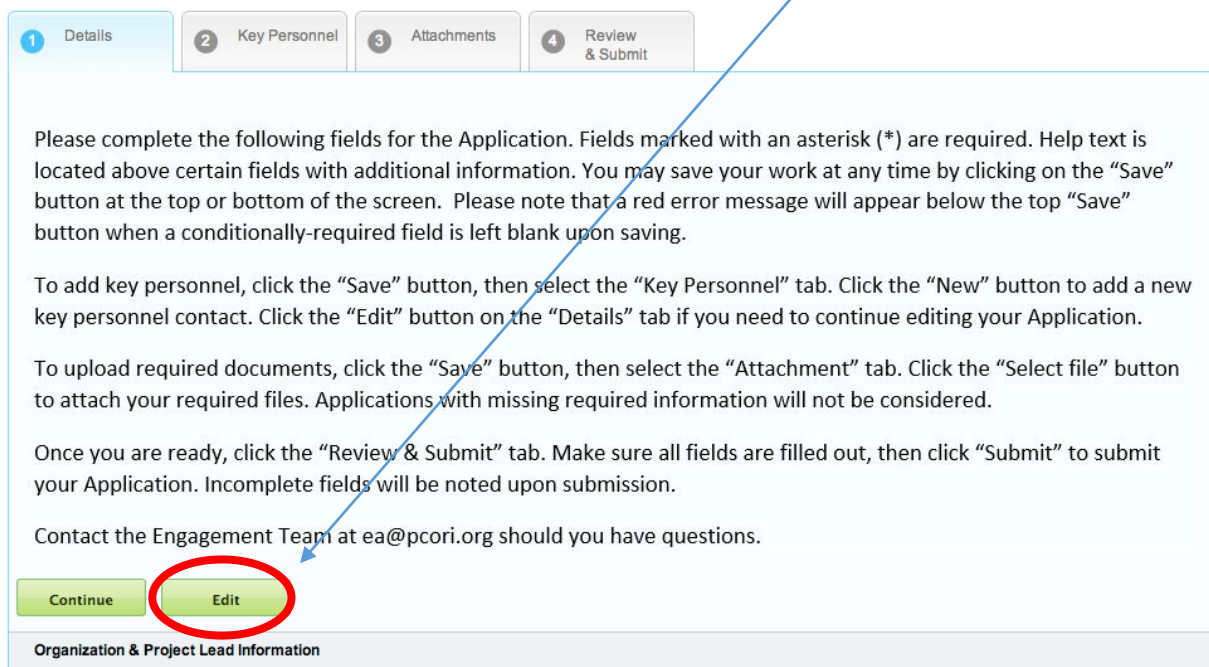


The screenshot shows a web application interface with a progress bar at the top containing four steps: 1. Details, 2. Key Personnel, 3. Attachments (highlighted), and 4. Review & Submit. Below the progress bar, a message states: "Required templates can be found in the Application Resources section on the [Eugene Washington PCORI Engagement Awards page](#)." A green "Continue" button is positioned below this message. The main content area contains three required document upload sections, each with a "Please submit a [document type] document. Please note that the file will be automatically renamed. (REQUIRED)" instruction and a "Select File..." button. The document types are: "financial statement document", "operating expense budget document", and "Board of Directors document". A fourth "Please submit a Workplan document. Please note that the file will be automatically renamed. (REQUIRED)" instruction is at the bottom, but it does not have a "Select File..." button.

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

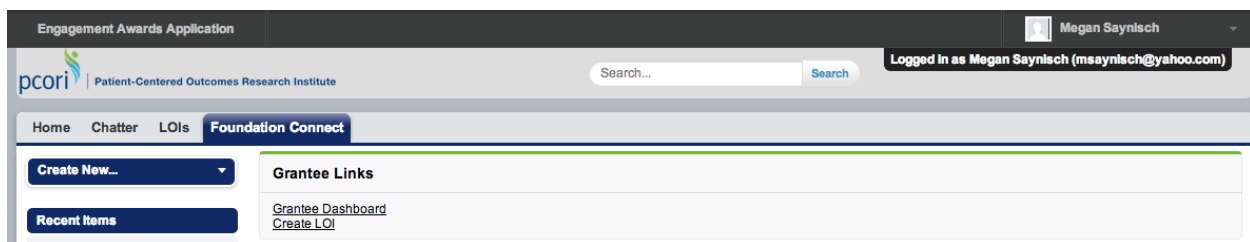
You can save and return to continue working on your application at any time.

- 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.**

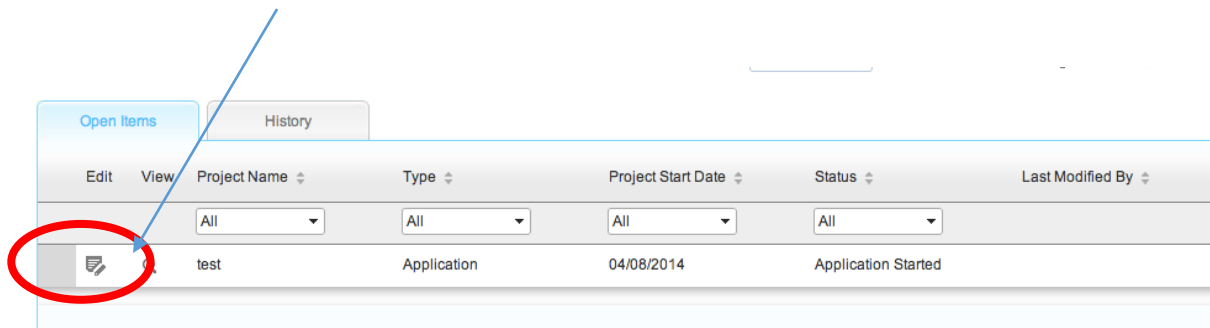



The screenshot shows a web application interface for an Engagement Awards Application. At the top, there are four tabs: 1 Details, 2 Key Personnel, 3 Attachments, and 4 Review & Submit. Below the tabs is a large text area with instructions: "Please complete the following fields for the Application. Fields marked with an asterisk (\*) are required. Help text is located above certain fields with additional information. You may save your work at any time by clicking on the “Save” button at the top or bottom of the screen. Please note that a red error message will appear below the top “Save” button when a conditionally-required field is left blank upon saving." Below this are three paragraphs of instructions: "To add key personnel, click the “Save” button, then select the “Key Personnel” tab. Click the “New” button to add a new key personnel contact. Click the “Edit” button on the “Details” tab if you need to continue editing your Application." "To upload required documents, click the “Save” button, then select the “Attachment” tab. Click the “Select file” button to attach your required files. Applications with missing required information will not be considered." "Once you are ready, click the “Review & Submit” tab. Make sure all fields are filled out, then click “Submit” to submit your Application. Incomplete fields will be noted upon submission." "Contact the Engagement Team at ea@pcori.org should you have questions." At the bottom of the form, there are two buttons: "Continue" and "Edit". The "Edit" button is circled in red, and a blue arrow points from the text "click “Edit” to continue working on your application." to it. Below the buttons is a section titled "Organization & Project Lead Information".

- 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.
- Click on the pencil and paper “Edit” icon to be taken back to your incomplete EAIN application.



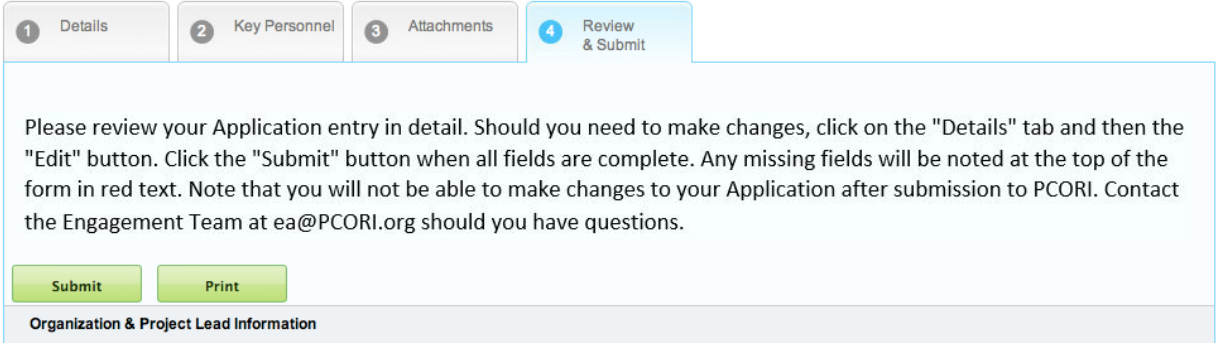
Edit	View	Project Name	Type	Project Start Date	Status	Last Modified By
		All	All	All	All	
		test	Application	04/08/2014	Application Started	



## 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."



The screenshot shows a web interface with four tabs: 1 Details, 2 Key Personnel, 3 Attachments, and 4 Review & Submit. The 'Review & Submit' tab is active. Below the tabs is a text box with instructions: "Please review your Application entry in detail. Should you need to make changes, click on the 'Details' tab and then the 'Edit' button. Click the 'Submit' button when all fields are complete. Any missing fields will be noted at the top of the form in red text. Note that you will not be able to make changes to your Application after submission to PCORI. Contact the Engagement Team at ea@PCORI.org should you have questions." Below the text are two green buttons: 'Submit' and 'Print'. At the bottom of the form is a section header: 'Organization & Project Lead Information'.



## 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](mailto:ea@pcori.org) or 202-370-9312.