

#### **PCORI Online User Manual:** *Submitting a Letter of Intent and Application*

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Patient-Centered Outcomes Research Institute

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#### **About the PCORI Online System**

#### **About the PCORI Online System**

In May 2013, PCORI launched a new online system to support our funding announcements and the application and review process.

The PCORI Online System makes it easier for researchers to submit Letters of Intent and Applications and it will facilitate the review process by making it easier for our reviewers to review submissions and submit comments.

Whether you're a first-timer or a returning applicant, you should find the **PCORI Online User Manual** a helpful guide to preparing and submitting a Letter of Intent (LOI) and application.

Have a question? Please contact us at pfa@pcori.org.

#### **Important Notes About the System**

# **Important Notes About the System**

- PCORI Online is only compatible with Safari and Google Chrome browsers. <u>Google Chrome is available here for download</u>.
- To complete all sections of a task (LOI or Application), use the left side navigational links and the "Previous" and "Next" buttons at the bottom of the screen.
- To save your work, please go to the "Save and Review" tab and click "Save and Review". Be sure to do this before closing the browser window or your work to be lost.



#### Submitting a Letter of Intent

# Registration

Use PCORI Online System to create and submit your Letter of Intent (LOI) and Application. To apply for PCORI funding, you must have or create an account.

- Go to <u>PCORI Funding Center</u> and click "Apply."
- If you have applied to PCORI in the past, you don't need to create an account. Just click "I forgot my password" to receive your new password.
- If you are applying for PCORI funding for the first time, click "Create an account now."

forgot my password	Appling for PCORI Funding for the first time? Click
Sign in	
Password	
osomano	

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

If you have applied to PCORI in the past, you don't need to create a new user account. Please click the "I forgot my password" link to the left to receive your new password.

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

Contact us at <u>pfa@pcori.org</u> should you have technical or administrative questions; our support team will respond within 48 business hours.

Online Portal for Methods and Cycle III

Create an account now

# **Create a Profile**

- Enter all required fields, highlighted in bold.
- Note: Usernames must contain alphanumeric characters only and should not include spaces.
- Click "Submit Request."
- You will be sent an email to proceed with your registration. Please click on the link to create your password.
- Once you have created your password, an email with your username and password will be sent to you for your records.

#### CONTACT INFORMATION



Please add me to the Annual Report Mailing



# **Home Page**

To apply for a PCORI Funding Announcement, click "Apply to PFA."

#### Welcome to PCORI Online!

PCORI Online is the contracts management system where you can submit your Letter of Intent (LOI) and Application. In addition, once your application is funded, you will be able to manage the contract activation and reporting as well.

To see all available PFAs, click "Apply to PFA".

Please view PCORI's <u>Funding Center</u> for application guidelines and templates, key dates, PCORI Funding Annoucements (PFAs) and additional information.

Contact us at <u>pfa@pcori.org</u> with any technical or administrative questions; our support team will respond within 48 business hours.

Note: the full application will open for submission on June 15.





To start the submission of your LOI, click "Apply to PFA" next to the PFA for which you are applying. Click the PFA title for additional information.



#### Improving Healthcare Systems

For projects that address critical decisions that face health care systems, the patients and caregivers who rely on them, and the clinicians who work within them

LOI Deadline: 6/15/2013 Application Deadline: 8/15/2013 Apply to PFA

### **Create LOI**

- Use the left-side navigational links and the "Previous" and "Next" buttons at the bottom of the pages to guide you through LOI creation and submission.
- Your work will be saved during your current session; however, if you close the browser window, your work will be lost.



# **Enter Organization and PI Information**

- Enter the applicant's organization name by typing in the first few characters, DUNS number, or EIN.
   PCORI Online will autocomplete the organization name if it exists in our system.
- If the applicant's organization does not exist in PCORI Online, click "Add New." You will be required to enter additional organization information (name, DUNS/EIN #, address, organization type).
- Select the principal investigator (PI) and administrative officer from dropdown menus.
- If the PI or administrative officer is not in the dropdown list, click "Add New." You will be required to enter information.



# **Enter Additional PI Information**

- Enter information regarding the PI's research experience and prior funding.
- Required fields are highlighted in bold.



# **Enter Project Information**

- Enter/update project title and estimated amount requested.
- Indicate if additional money beyond specified limits is requested.
- Select estimated project length.
- For broad PFAs, you may copy and paste the technical abstract from the template available in the <u>Funding</u> <u>Center</u>. (Some PFA types require additional project information via upload.)
- Complete additional project-related questions as required.

If project costs and/or period exceed specified limits, an uploaded request is required (see Special Requests and Uploads slide below).



Technical abstracts may not exceed 3000 characters (including spaces). LOIs with technical abstracts exceeding this limit will be rejected.

#### **Technical Abstract**



Characters left: 3000

### **Enter Key Personnel Information**

- Click the green circle (plus sign) to add key personnel. A popup window will appear.
- Enter key personnel information, including name, contact information, and role.
- Delete key personnel by clicking on the red circle (minus sign), which will appear as you hover your cursor over the name. You cannot edit your entry; you must delete and start over.



personnel.

# **Key Personnel Information**



# **Special Requests and Uploads**

If costs and/or project period exceed specified limits, an uploaded request is required. Some PFA types require additional project-related uploads. For specific instructions, refer to the <u>PCORI Application Guidelines</u> for the relevant PFA type for specific instruction.

- Find request forms within the <u>Funding Center</u>.
- Fill the form, convert it to PDF, and upload.
- Special request forms must be submitted before the LOI deadline.



#### **Review**

- Once you've completed all LOI sections, go to the "Review and Submit" tab and click "Save and Review." Any incomplete fields will be highlighted in the left navigation panel.
- If all required fields are complete, you will be taken to a summary screen to review your LOI, print it, or save it to PDF.



# **Submit your LOI**

- Navigate back to the main menu.
- Click "Submit" to submit your LOI to PCORI.



#### PI AND CONTACT INFORMATION

Principal Investigator - test test Administrative Official - Grantee Test Financial Official -PI Designee / Assistant -

**Please review your LOI fully.** You **WILL NOT** be able to make changes after you click "Submit."

# Submitting an Application

# Login

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 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 "I forgot my password" link

Login Now: Username Password	Technical Note:       Please use Chrome or Safari         browsers.       If you are a new user, presse register by         clicking on the "Create an Account Now"         button.         If you have applied to PCORI in the past, you         don't need to create a new user account
L forgot my password	Please click the "I forgot my password" link to the left to receive your new password.       Note that the PCORI         View PCORI's Funding Center for application guidelines and templates, key dates, PCORI Funding Annoucements (PFAs) and additional information.       Note that the PCORI         Contact us at pfa@pcori.org should you have technical or administrative questions; our       and Safari browsers at this time.
Forgot your password? Click "I forgot my password" to retrieve it.	Support team will respond within 48 business         hours.         Online Portal for Methods and Cycle III         Training Opportunity: Applicant Town Hall         Registration now available for all opportunities.         Please visit our Training Materials page for more information.

Create an account now

#### **Home Page**

• To begin your application, click the yellow pencil icon next to the contract number.

• The Application includes previous contact and project information from the LOI and requires additional information.



# **Create the Application**

- Use the left-side navigational links and the "Previous" and "Next" buttons at the bottom of the pages to guide you through Application creation and submission.
- Your work will be saved during your current session; however, if you close the browser window, your work will be lost.



# **PI and Contact Information**

- Review the Organization, Principal Investigator, and Administrative Official entered at LOI. You may
  edit if necessary. (Note that Organization, PI, and Administrative Officer information are <u>required</u> for
  application submission.)
- You may now choose a proxy in the system using the "PI Designee" dropdown. Select the designee from the dropdown list; if the designee is not in the dropdown list, click "Add New." You will be required to enter information.



# **Review Additional PI Information**

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

#### Principal Investigator Information

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

Position Title				
Position Title				
Degree				
AAS			APRN	
AB	U	-	BA	
BC				
BCH				
BCHIR		<		
BM	<b>A</b>			
DMDO	•			

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Are you interested in becoming a Reviewer?

No

RMRC

If you answered yes and would like to become a PCORI reviewer, please follow the following link to complete our external reviewer application: here.

How many years of research experience do you have after attaining your terminal degree?

# **Review and Enter Project Information**

- Indicate if the application is a resubmission. If yes, you must enter the ID of your prior application.
- Review (and edit if necessary) additional project information entered at LOI, including project title, amount requested, project length, technical abstract (if applicable to the PFA type), and additional project information questions.



	la this a resubmission?
	No ¢
	Please Enter the ID of Your Prior Application
	Project Title
L	PROJECT TITLE
	Amount Requested
	\$700,000.00
	Are Direct Costs requested greater than \$500K during any year of the project?
	No
	Please select your estimated project length.
	18 to 36 Months

# **Enter Project Information**

- Enter additional project information. (Note that some questions displayed at right are not applicable to certain PFA types. Refer to the PFA for additional guidance.)
- Enter projected start 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 <u>PCORI</u> <u>Funding Center</u>, for additional guidance.
- All fields are required.



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Path:

# **Review Key Personnel Information**

- Review the Key Personnel information entered at LOI.
- Click the green circle (plus sign) to add key personnel. A popup window will appear.
- Enter key personnel information, including name, contact information, and role.
- Delete key personnel by clicking on the red circle (minus sign), which will appear as you hover your cursor over the name. You cannot edit your entry; you must delete and start over.



# **Key Personnel Information**



#### **Enter the Budget Summary**

- Enter the budget summary for all years of the project by clicking on the "Budget Summary" link.
- The budget entry screen will then appear as a popup.

Requests for direct costs over the project's cap per year must have been made during the LOI stage. Refer to the PFA to which you are applying for additional information.

You must click "Save Spreadsheet" or all of your work will be lost.



#### **Enter the Budget Summary**

- Enter budget information in the budget summary popup for each year of the project. The system will calculate subtotals and totals. You need not enter information into the "Actual" columns at this time.
- You must click the "Save Spreadsheet" button to save your work prior to closing the popup.

	Budget Summary								Save Spreadsheet			
	Year 1		Year 2		Year 3		Year 4		Year 5		lotal	
	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual
Personnel Direct Costs												
Salaries											\$0.00	\$0.00
Fringe Benefits											\$0.00	\$0.00
Personnel Direct Costs Subtotal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Clic	k the "Sa	.00	\$0.00	\$0.00
Other Direct Costs								Snr	eadsheet	- <i>"</i>		
Consultant Costs								but	ton to say		\$0.00	\$0.00
Equipment									our work		\$0.00	\$0.00
Supplies								y			\$0.00	\$0.00
Travel											\$0.00	\$0.00
Other Expenses												
											\$0.00	\$0.00
											\$0.00	\$0.00
											\$0.00	\$0.00
Other Expenses Subtotal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

#### **Enter Milestones Information**

- 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.
- 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.



#### **Enter Milestones**



### **Upload Required Documents**

All PFA types require additional documents to complete the application. For specific instructions, refer to the PCORI Application Guidelines found in the <u>PCORI Funding Center</u> for the relevant PFA type.

- Find templates within the <u>PCORI Funding Center</u>.
- Complete the templates, convert them to PDF, and upload.
- All required forms must be uploaded in order to submit the application.



#### **Upload Required Documents**

- Delete uploaded documents by clicking on the red circle.
- You may edit document type by clicking on the pencil-and-paper icon.



#### **Save and Review**

- Once you've completed all Application sections, go to the "Save and Review" tab and click "Save and Review." Any incomplete fields will be highlighted in the left navigation panel.
- If all required fields are complete, you will be taken to a summary screen to review your application, print, and submit to your Administrative Official for final review and submission to PCORI.



# 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 you previously designated.
- Note that only the AO may submit the application to PCORI. Please follow up with your AO to ensure that your application was reviewed and submitted.



Position Title

**Please review your Application fully.** You **WILL NOT** be able to make changes after you click "Submit to AO."

#### PCORI Funding Announcements: Applicant Resources and Contact Information

# **PCORI Funding Announcements: Resources and Contact Information**

- All active opportunities can be found in the <u>PCORI Funding Center</u>.
- 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 <u>Applicant FAQs</u> 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 <u>Training Materials</u> page. Once available, applicants will receive an email about these opportunities.
- If you have questions, please contact us at pfa@pcori.org.