

# Pipeline to Proposal (P2P) Awards

## Cheat Sheet for Technical Assistance (TA) Lead/Reviewer



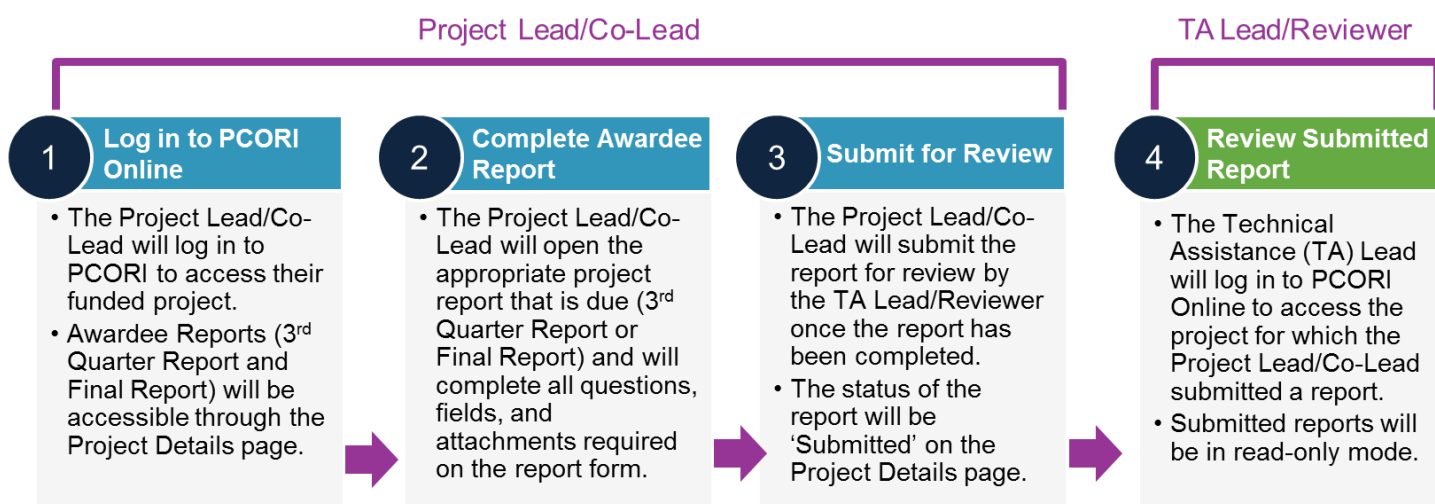
Updated as of 5/2/2018

### Important Reminders

This Cheat Sheet provides guidance on how a Technical Assistance (TA) Lead/Reviewer will access and review 3<sup>rd</sup> Quarter and/or Final Reports for funded P2P projects through PCORI Online, PCORI's new awards management system. After May 1, 2018, all remaining P2P project reports must be submitted through PCORI Online (instead of Wizehive).

**This Cheat Sheet provides step-by-step instructions on how to:**

- Access a funded P2P project in PCORI Online
- Review a submitted project report



For step-by-step instructions on how to create, log-in, and access your PCORI Online account, please see the [PCORI Online User Access Cheat Sheet](#). If you encounter any issues with logging in or accessing your account, please email the PCORI Help Desk at [help@pcori.org](mailto:help@pcori.org).

### 1. Access Project in PCORI Online

*The TA Lead/Reviewer will receive an email notification that the Awardee has submitted a report for review. This email will contain a direct link to the report in PCORI Online. All Awardee Reports are also accessible through the Project Details page for the funded P2P project.*

1. Click the link provided in the email notification for the report that is ready to review. If you are not already logged in, you will be prompted to log in to [PCORI Online](#).
2. Alternatively, you can log in to [PCORI Online](#), and click the 'Pipeline to Proposal Awards' button on the PCORI Online home page.
3. Click the 'My Projects' button on the Pipeline to Proposal Reporting Portal home page.

4.	Click the <b>title</b> of the project on the Pipeline to Proposal Awards dashboard.
5.	<p>You will be navigated to the Project Details page for this project. The Project Details page contains two sections at the top of the page that contain information about the funded project: <b>Project Summary</b> and <b>Additional Information</b>.</p> <p>➤ <b>TIP:</b> If any of the information in the <b>Project Summary</b> or <b>Additional Information</b> sections of the Project Details page need to be updated, please reach out to PCORI first at <a href="mailto:p2p@pcori.org">p2p@pcori.org</a>.</p>

## 2. Review a Project Report

*Tier A, Tier II, and Tier III Awardees will be required to complete and submit their 3<sup>rd</sup> Quarter Report and Final Report through PCORI Online, which the TA Lead/Reviewer will then review.*

### Review the Report

1.	<p>Scroll down the Project Details page to the <b>Awardee Reports</b> section. Alternatively, you can click the '<b>Awardee Reports</b>' hover link at the top of the Project Details page, which will navigate you down the page to that section.</p> <p>➤ <b>TIP:</b> The Awardee Reports section contains a list of all previous reports that were submitted for the project. To see the full list of historical reports in this section, you may need to click the 'Show [#] more' link at the bottom of the Awardee Reports section, which will expand to show you the full list.</p>
2.	Locate the <b>3<sup>rd</sup> Quarter Report</b> or <b>Final Report</b> that is ready for your review. The report will have a <b>Form Status</b> of 'Submitted.' Click the <b>title</b> of the report you want to review.
3.	You will be navigated to a new page, which contains the <b>read-only</b> Awardee Report form for you to review.
4.	Some Awardee Report forms may also include additional documentation that the Project Lead/Co-Lead uploaded while completing the report (i.e., List of Draft CER Questions). To locate these attachments to review, scroll down the Awardee Report form to the <b>Notes &amp; Attachments</b> section.
5.	If you would prefer to review the report in PDF format, click the ' <b>View as PDF</b> ' button at the top of the Awardee Report form. This will generate a PDF version of the Awardee Report form.
6.	As you review the report, you may think of edits, corrections, or additions that the Project Lead/Co-Lead should make to the report. Since a submitted report is in read-only format in PCORI Online, the report will need to be "unlocked" for further edits. In order to unlock the report for editing, the TA Lead/Reviewer should reach out to <a href="mailto:p2p@pcori.org">p2p@pcori.org</a> .

### Navigate Back to Project Details Page & Access Other Projects

1.	To navigate back to the Project Details page from the Awardee Report form once you are done reviewing, click the project title at the top of the form.
2.	To navigate back to the Pipeline to Proposal Awards dashboard to review reports from other projects, click the ' <b>Home</b> ' tab above the Project Details page. Then, follow <b>Steps 2-5</b> above in Section 1 ("Access Project in PCORI Online") to access another project.