PCORI Online Cheat Sheet:
User Access: Logging in & Navigating PCORI Online

Updated as of 5/9/2018

Logging in to PCORI Online

The following steps provide guidance on logging in to PCORI Online.
Your User Name is the email address you use when interacting with PCORI.

Logging in as a New User

1.	Navigate to PCORI Online (https://pcori.force.com/engagement).
2.	To log-in as a *new user*, click '**New User?**'
3.	Enter information in the required fields (designated with a red asterisks*), and create a password.
4.	Click '**Join PCORI Portal**.'
5.	Submit additional information, and click '**Submit**.'
6.	You will receive an email with further instructions.
7.	From the automated email, click the link that will direct you to log-in to the PCORI Online home page.

Logging in as a Returning User

1.	Navigate to PCORI Online (https://pcori.force.com/engagement).
2.	To log-in as a *returning user*, enter your User Name and Password and click '**Log in**.'
3.	If you have previously logged into PCORI Online, your User Name will remain unchanged. ➢ *Your username will be the email address used when interacting with PCORI Staff.*
4.	If you are prompted to reset your password, click '**Forgot your password?**'
5.	On the following screen, enter your User Name (i.e., your email address), and click '**Reset Password**.'
6.	You will receive a system-generated email with instructions on how to reset your password
7.	From the automated email, click the link that will direct you to log-in to the PCORI Online home page.

Navigating PCORI Online

The following steps provide guidance on navigating to an LOI, Application, or Project.

Accessing a LOI or Application

1.	Once you have created your account, log in to PCORI Online (https://pcori.force.com/engagement).
2.	On the next page, click the button for the area of funding you are applying for (i.e., Research Awards, Engagement Awards).
3.	Click '**My LOIs and Applications**' to access a list of your LOI(s) and Application(s).
4.	If your LOI or Application is not listed, please email pfa@pcori.org to gain access.

Accessing a Project

1.	Once you have created your account, log in to PCORI Online (https://pcori.force.com/engagement).
2.	On the next page, click the button for the area that you have funding for (i.e., Research Awards, Engagement Awards).
3.	Click '**My Projects**' to view a list of your current project(s).
4.	If your project is not listed, please email pfa@pcori.org to gain access.

Appendix

The table below provides information on the different authorized user roles in PCORI Online and the privileges associated with each type of user.

PCORI Online Authorized User Roles and Privileges

Authorized User Role	Privileges
PI/Project Lead 1	- Create/Modify Project (Pre-Award) - Create/Modify Milestone - Create/Modify Budget - Edit a Progress Report - Approve/reject progress reports - Upload documents in Notes & Attachments - Create/Modify Project Personnel Record - Create/Modify a Publications Record - Create/Modify COIs & Expertise - Create/Modify IRB - Create Invoices - Delete/Modify Milestones (Pre-Awards) - Delete/Modify PCroject Personnel (Pre-Awards) - Submit PIR

Administrative Official (AO)	- Create/Modify Project (Pre-Award) - Create/Modify Milestone - Create/Modify Budget - Edit a progress report - Approve/reject Progress Reports - Upload documents in Notes & Attachments - Create/Modify Project Personnel Record - Create/Modify a Publication Record - Create/Modify COIs & Expertise - Create/Modify IRB - Create Invoices - Modify Milestones (Pre-Awards) - Modify Project Personnel (Pre-Awards) - Submit PIR
PI/Project Lead Designee 1	- Create/Modify Project (Pre-Award) - Create/Modify Milestone - Create/Modify Budget - Edit a progress report - Upload documents in Notes & Attachments - Create/Modify Project Personnel Record - Create/Modify a Publication Record - Create COIs & Expertise - Create Invoices - Submit PIR
PI/Project Lead Designee 2	- Create/Modify Project (Pre-Award) - Create/Modify Milestone - Create/Modify Budget - Edit a progress report - Upload documents in Notes & Attachments - Create/Modify Project Personnel Record - Create/Modify a Publication Record - Create COIs & Expertise - Create Invoices - Modify Milestones (Pre-Awards) - Modify Project Personnel (Pre-Awards) - Submit PIR
Contract Manager	- Create/Modify Project (Pre-Award) - Create/Modify Milestone - Create/Modify Budget - Edit a progress report - Upload documents in Notes & Attachments - Create/Modify Project Personnel Record - Create/Modify a Publication Record - Modify Milestones (Pre-Awards) - Modify Project Personnel (Pre-Awards) - Create COIs & Expertise
Financial Contact	- Create/Modify Project (Pre-Award) - Create/Modify Milestone - Create/Modify Budget - Edit a progress report - Upload documents in Notes & Attachments - Create/Modify Project Personnel Record - Create/Modify a Publication Record - Create Invoices - Modify Milestones (Pre-Awards) - Modify Project Personnel (Pre-Awards) - Submit PIR