A Guide for Research Administration Offices
Proposal and Service Request Review

For up-to-date information and other resources, please visit the ORIS website.

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APPROVAL AND BYPASS APPROVAL

☐ Open a proposal with a status = Approval in Progress.
☐ Review all tabs and print a PD Summary (see instructions on the next page).
   Note: The Proposal tab is a summary of all information contained within the record.
☐ Either Return or Approve the record as desired.

☐ Include Comments as needed and confirm Return or Approve.

To Bypass an approver:
☐ Click on Route Log tab.
☐ Click on Bypass Reviewer.
- Input **Comments** and click on **Bypass** button.

To Print or View the PD Summary:

- Click on the **More Actions** icon and then click on **Print Proposal** in the dropdown menu.

- Click on the box next to **Proposal Summary Form** and then click the **Print** button.
NOTE: If the PD Summary will not open, turn off the Pop-up Blocker for the browser in use.

The PD Summary is a Microsoft Word document and can be saved or printed as any other Microsoft Word document.

- Click on **File** and choose the desired action from the menu.

- Click on **Save**, **Save As** or **Print** as needed.
ADMIN CORRECTION TO A PROPOSAL

☐ Open a proposal with a status = Approval in Progress.

☐ Click on the More Actions icon.

☐ Choose Admin Correction from the dropdown menu.

☐ Click on Create button.

☐ Make desired changes in the record.

☐ Click on Submit Admin Correction.

☐ Click on the Submit button to confirm.
To review Admin Corrections:

- Click on **Proposal tab**.

- Click on **History** in upper right corner.

The **Version History** will open:

- Click on the **Version** you want to review and the following will open:
☐ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.

To cancel an Admin Correction without saving:

☐ Click on the More Actions icon and choose **Cancel Admin Correction** from the dropdown menu.
SERVICE REQUEST REVIEW

☐ Click on the Service Request (SR) tab and then click on the Service Requests Pending My Review tab.

OR

☐ Click on the SR from the Action List widget on the Dashboard.

☐ Click on the desired SR to review.

☐ Review all tabs in the Service Request and click on Return or Approve as desired.
- Enter any comments and confirm by clicking on **Return** or **Approve** as appropriate.

- Status will change to **Approved**.
INSTITUTE PROPOSAL MODIFICATION

☐ Click on the Institute Proposal tab.

☐ Click on the More Actions icon and choose Modify Institute Proposal from the dropdown menu.

☐ Enter a description and click on Create button.

☐ Make desired changes in the record.

☐ Click on Submit.

☐ Click on Save & Submit button to confirm.
To review IP Modifications:

- Click on Institute Proposal tab.

- Click on History in upper right corner.

The Version History will open:

- Click on the Version you want to review and the following will open:

- Click on Compare with Active Proposal to see changes. Deleted changes show in red and Added changes show in green.
To cancel an IP Modification without saving:

- Click on the **Cancel** button.

- Then click on Cancel to confirm.

The IP Modification will show as **Cancelled** in the **History**.