

# Service Request

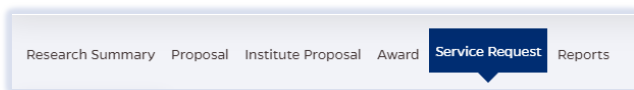
## Confidential Disclosure Agreement/ Non-disclosure Agreement (CDA)



### How do I create a Service Request for a CDA?

- ❖ Confidential Disclosure/Non-disclosure Agreement (CDA) was previously known as *Negotiation Only Proposal Type* in Coeus. This type of Service Request is only applicable for School of Medicine contracts. These requests should never involve funding.

- ❑ From the Dashboard, click on **Service Request** in the top row.



- ❑ Click on the green **Create New Service Request** button in the upper right corner.




The following screen will open:

- ❑ The **Priority** dropdown menu can be changed if needed to *low* or *high*.
- ❑ The **Department** field is the lead unit or first 8-digits of the cost center. Begin typing the unit name and a dropdown menu with options will open.
- ❑ Choose the **Category** – **Service Request** from the dropdown menu.
- ❑ Choose the **Type** – **Confidential Disclosure/Non-disclosure Agreement (CDA)** from the dropdown menu.

- ❑ Complete the Subject line in the **Subject** field. The first section of the Subject is the type of Service Request followed by other identifying information that the user will need to input.

Enter the **department**, **PI**, and **duedate**.

- ❑ Click on the **Save** button in the bottom right corner.  The Service Request has now been started and assigned a system number.

- ❑ Click on the **Questionnaire** tab and complete all questions on all questionnaires. Each questionnaire will begin as a **yellow** tab. There may be multiple questionnaires.

After the questionnaire is completed the tab will change to **green**.

- ❑ Click on the **More Actions** button in the upper right hand corner. 

- ❑ Click on **Print Service Request**.

- ❑ Choose **FillableCDA** from the list in the dropdown and then click on **Print**.

- ❑ Send the fillable form to the PI to be completed and signed.

- ❑ Complete all Questionnaire tabs according to the PIs provided answers.
- ❑ Upload the signed fillable form to the Service Request where the PI Certification is requested.

If additional information or attachments need to be added:

- ❑ Click on the **Comments** tab.

The following files under 50 MB are supported: pdf, doc, docx, csv, xml, ppt, pptx, txt, xls, xlsx, zip, json, xlsx, msg.

- ❑ Click on the **Validate** button in the upper right corner to determine if further action is required. Fix any errors and evaluate if any warnings require changes. A Service Request can be submitted with warnings, but all errors that display must be fixed before Fibi will be able to route the Service Request for approval.
- ❑ Click on the **Submit** button when ready to submit.