

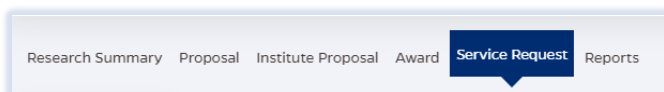


Create a Service Request PI Change Prior Approval

How do I create a Service Request for a PI Change Prior Approval?

❖ PI Change Prior Approval (previously known as Administrative Action in Coeus)

- ❑ 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.



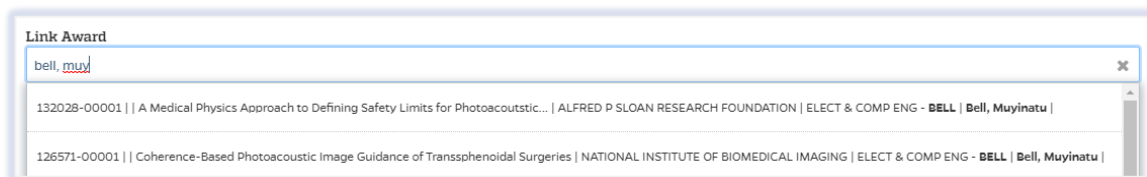
The following screen will open:

The **Priority** dropdown menu can be changed if needed to *low or high*.

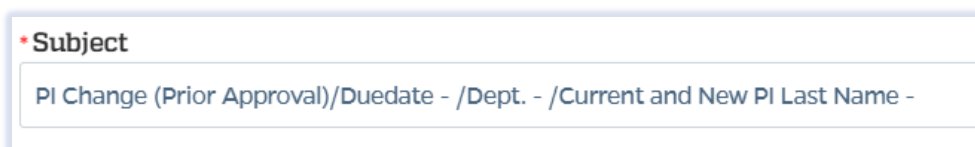
- ❑ The **Department** field is the lead unit or first 8-digits of the cost center. Begin typing the unit name and a dropdown menu with options will open.
- ❑ Choose the **Category** – **Award** from the dropdown menu; in order to link to the award.
- ❑ Choose the **Type** – **PI Change Prior Approval** from the dropdown menu.

- ❑ Complete the **Link Award** field as appropriate. This field is an elastic search.
To search the Link Award field, the user can input the sponsor, SAP award #, PI, or title.

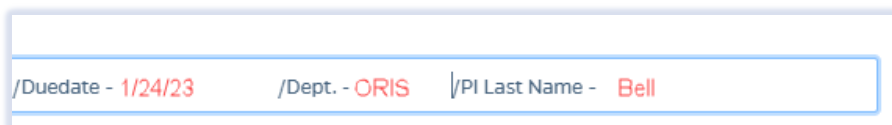
Once the appropriate award appears, click on the award in the dropdown menu.




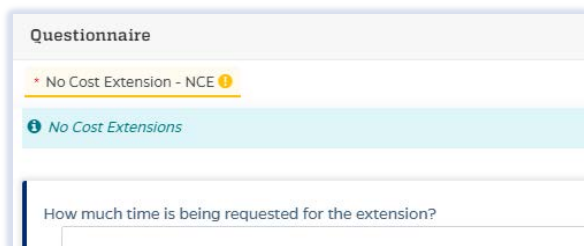
- ❑ Complete the Subject line in the **Subject** field. The first section of the Subject is the type of Service Request followed by other identifying information that the user will need to input.




Enter the **due date**, **department**, and **PI**.



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

