

## Create a Service Request PI Change Prior Approval

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

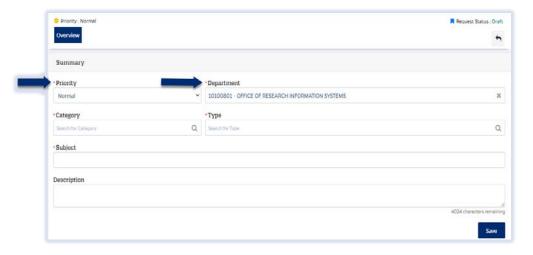
- ❖ PI Change Prior Approval (previously known as Administrative Action in Coeus)
- ☐ From the Dashboard, click on **Service Request** in the top row.



☐ 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.

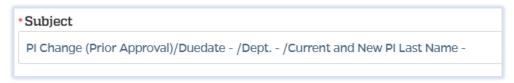
To search the Link Award field, the user can input the sponsor, SAP award #, PI, or title.



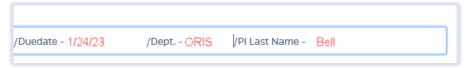
Once the appropriate award appears, click on the award in the dropdown menu.



☐ 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.

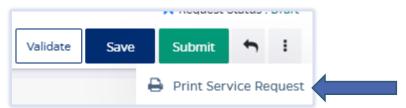


- ☐ Click on the **Save** button in the bottom right corner. The Service Request has now been started and assigned a system number.
- Click on the **Questionnaire** tab and complete all questions on all questionnaires. Each questionnaire will begin as a yellow tab. There may be multiple questionnaires.



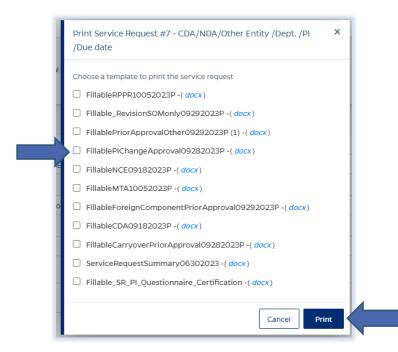
After the questionnaire is completed the tab will change to green.

- ☐ Click on the **More Actions** button in the upper right corner.
- ☐ Click on **Print Service Request.**





☐ Choose FillablePlChangePriorApproval 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, xlsm, jpg, 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.



