

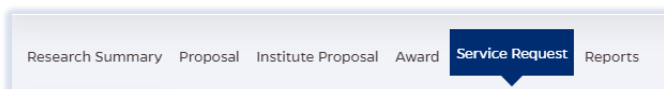


# Create a Service Request Pre-award Request

## How do I create a Service Request for a requesting a Pre-award?

Pre-award Request was previously completed in Webforms. Sponsored Projects Shared Services reviews and processes all requests.

- 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:

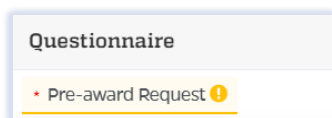
The **Priority** dropdown menu can be changed if needed to *low* or *high*.

- 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 – Institute Proposal** from the dropdown menu.

- Choose the **Type – Pre-award Request** 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 **SAP Responsible CC, department, and PI.**

- ❑ Enter the **Link Institute Proposal (IP)** that requires the Pre-award authorization. This field is an elastic search so the user can enter words from the title of the proposal, the PI's last name, the status of the IP, the IPN, as well as other criteria in order to find the IP.
- ❑ 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. In the case of Revisions, the PI must complete a Certification as well.

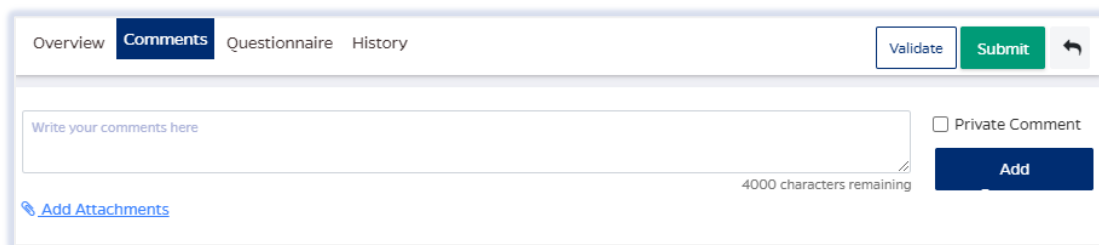


After the questionnaire is completed the tab will change to **green**.

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, 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. The record will be routed to Sponsored Projects Shared Services (SPSS) for review and approval.



## UPON APPROVAL

Once Sponsored Projects Shared Services approves the Service Request, the user will receive an email notification that announces the status change.

The Pre-award # can be found in the **Comments** of the record.