How do I create a Service Request for a Progress Report/Continuation/Modification of a Grant or Subgrant?

❖ Progress Report/Continuation/Modification of a Grant or Subgrant (previously known as Continuation 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 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: Progress Report/Continuation/Modification of a Grant or Subgrant 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.

- Keep the type of Service Request in the Subject line that is appropriate and delete the types that do not apply. So, if this is a Progress Report, delete Continuation/Modification of a grant or Subgrant.

- 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**.

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Choose Fillable_ProgressReport_Continuation_Mod... 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, jpg, msg.

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☐ 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.