**JH fibi**

**Office of Research Information Systems**

A Guide for Research Administration Offices

Proposal and Service Request Review

For up-to-date information and other resources, please visit the ORIS website.
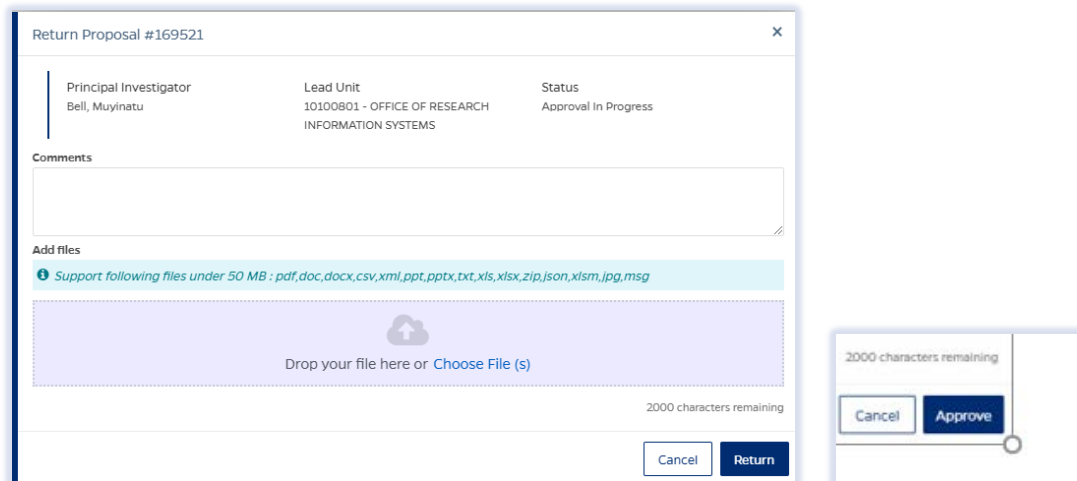
Last Updated: 5/23/24

# Table of Contents

# APPROVAL

- ☐ Open a proposal with a status = Approval in Progress.
- ☐ Review all tabs and print a PD Summary (see instructions on the next page).

  Note: The Proposal tab is a summary of all information contained within the record.

- ☐ Either **Return** or **Approve** the record as desired.
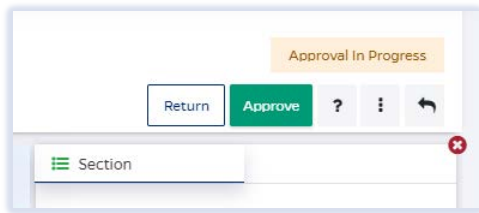


- ☐ Include **Comments** as needed and confirm **Return** or **Approve**.



## To Bypass an approver:
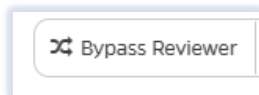


Occasionally, a Dept. Business Office will need to approve a record, but the individual is unable to access the system and will email the Research Administration Office asking to Bypass their stop. It is recommended to note that a Department made this request via email. The email can be attached to the record on the Comments tab.
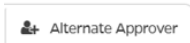
- ☐ Click on **Route Log** tab.

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☐ Click on **Bypass Reviewer**.
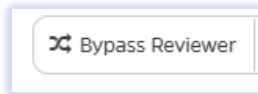


☐ Input **Comments** and click on **Bypass** button.



## To Add an Alternate Approver:



If the user needs to add someone (including themselves) to a Route log stop, always choose Add **ALTERNATE Approver**.  This will add the approver to the current stop and then there is no need for anyone else listed to approve.  In essence bypassing the list, but also adding another Research Administrator to approve in their place.
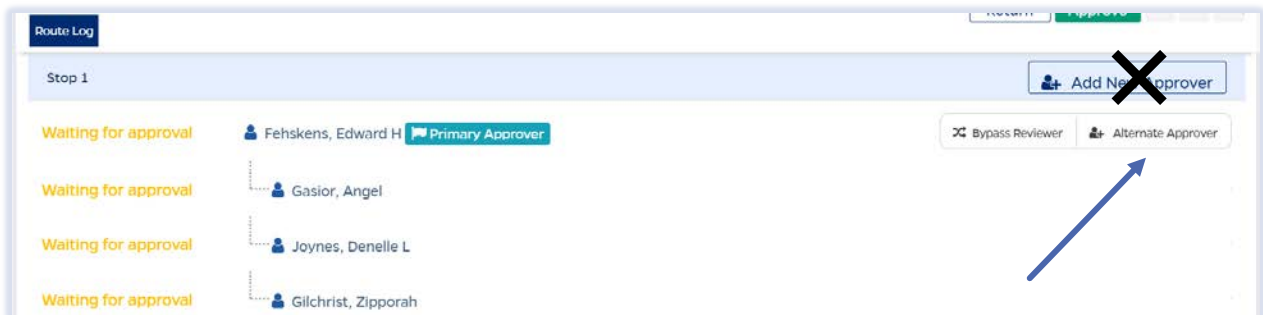


If in doubt, please contact ORIS or your Supervisor for further clarification.

**COMMON ERROR:**

Often **Add NEW Approver** is used when in fact the user really wants to add an alternate approver.

When to use Add **NEW** Approver



No Business scenarios exist presently where this is needed.  However, if an approver needs to be added as a whole new stop this option would be appropriate.

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# To Print or View the PD Summary:

☐ Click on the **More Actions** icon ⋮ and then click on **Print Proposal** in the dropdown menu.
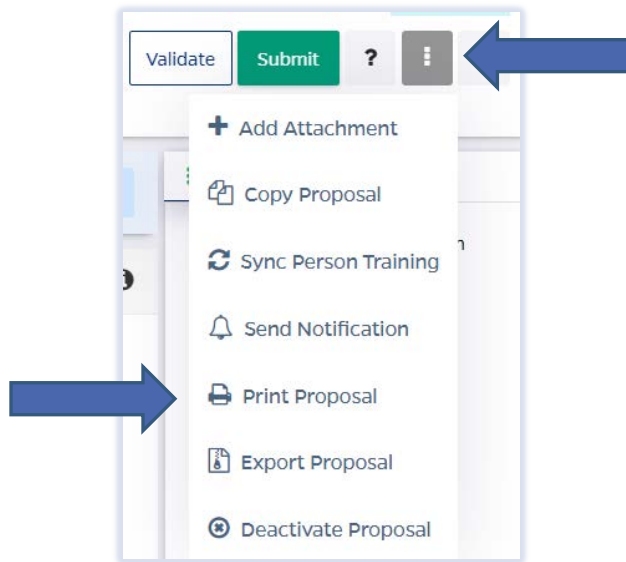


☐ Click on the box next to **Proposal Summary Form** and then click the **Print** button.
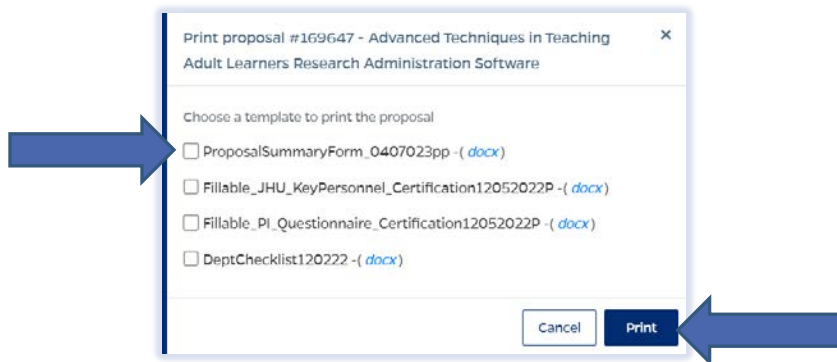


**NOTE:  If the PD Summary will not open, turn off the Pop-up Blocker for the browser in use.**

**JOHNS HOPKINS UNIVERSITY**
**PROPOSAL SUMMARY FORM**

| Proposal ID: 169647 | | | | Institute Proposal Number: | | |
|---|---|---|---|---|---|---|

**KEY PERSONNEL**

| Name | Dept. | Role | % Effort | COI Training | Effort Training | Certification |
|---|---|---|---|---|---|---|
| Bell, Muyinatu | 12015000 - ELECTRICAL AND COMPUTER ENGINEERING | Principal Investigator | 56.00 | 05/04/2020 | 07/05/2017 | Complete |
| Black-Winstead, Myra A | 000001 - JOHNS HOPKINS ENTERPRISE | Co-Investigator | | | 01/09/2009 | Complete |
| Judy, Thomas | 12015000 - ELECTRICAL AND COMPUTER ENGINEERING | Co-Investigator | | | 03/20/2009 | Complete |

**GENERAL INFORMATION**

| Sponsor (Application to): 300023 - ADVANCED BIONICS CORPORATION (ABC) | |
|---|---|
| Sponsor Type: Private Profit | Sponsor Deadline: |
| Prime Sponsor (if subaward): | |

The PD Summary is a Microsoft Word document and can be saved or printed as any other Microsoft Word document.

☐ Click on **File** and choose the desired action from the menu.
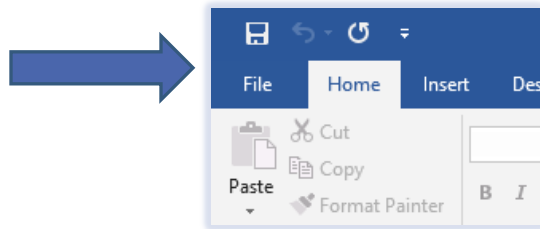


☐ Click on **Save**, **Save As** or **Print** as needed.

# ADMIN CORRECTION TO A PROPOSAL

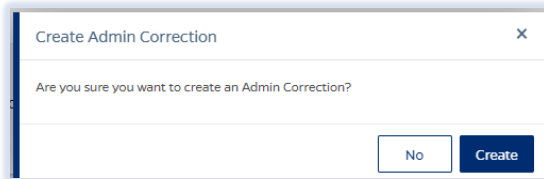☐ Open a proposal with a status = Approval in Progress.

☐ Click on the **More Actions** icon. 
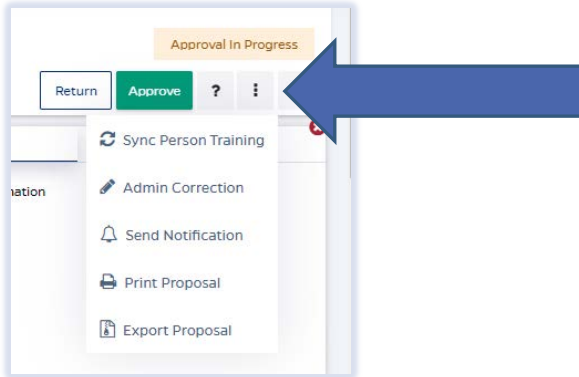


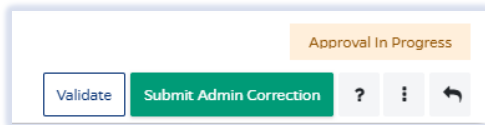☐ Choose **Admin Correction** from the dropdown menu.
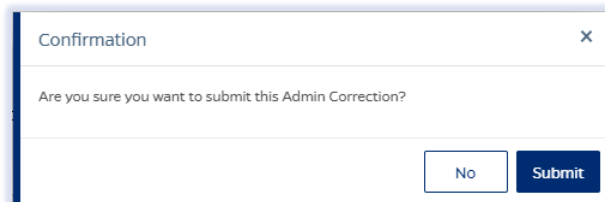


☐ Click on **Create** button.



☐ Make desired changes in the record.
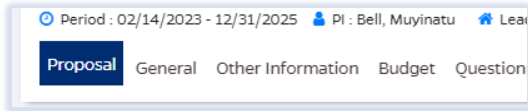
☐ Click on **Submit Admin** Correction.
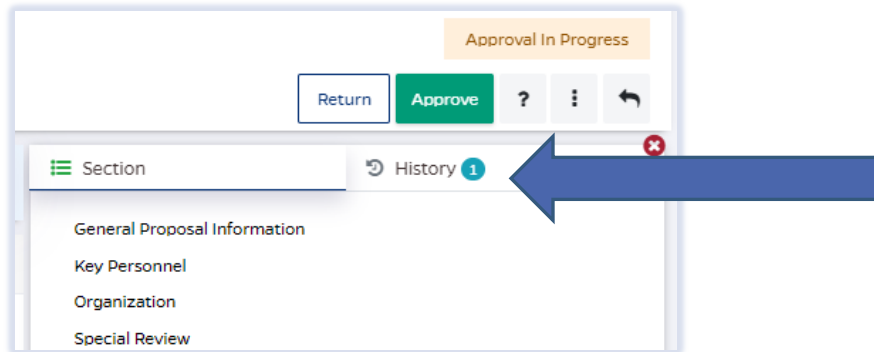


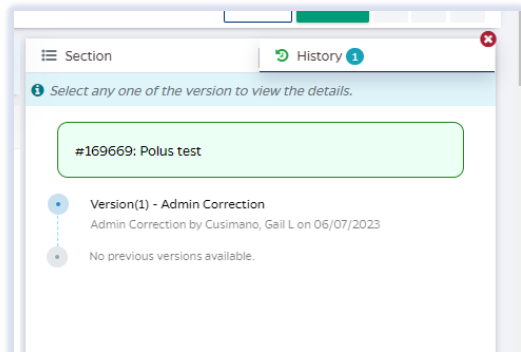☐ Click on the **Submit** button to confirm.

# To review Admin Corrections:

☐ Click on **Proposal** tab.



☐ Click on **History** in upper right corner.



The **Version History** will open:



☐ Click on the **Version** you want to review and the following will open:
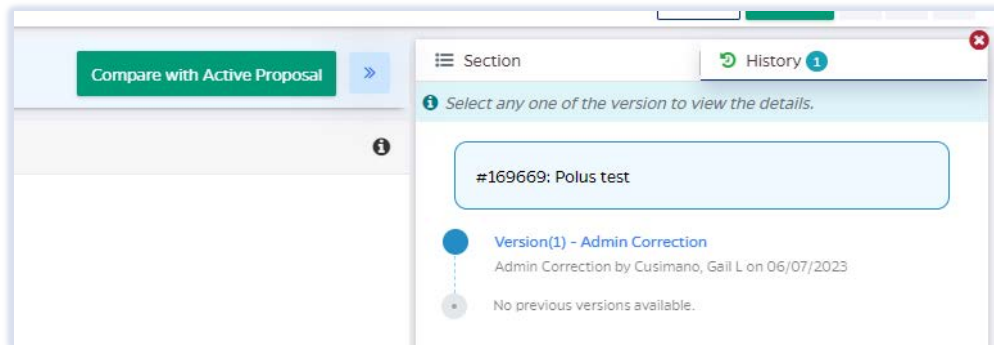
☐ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.
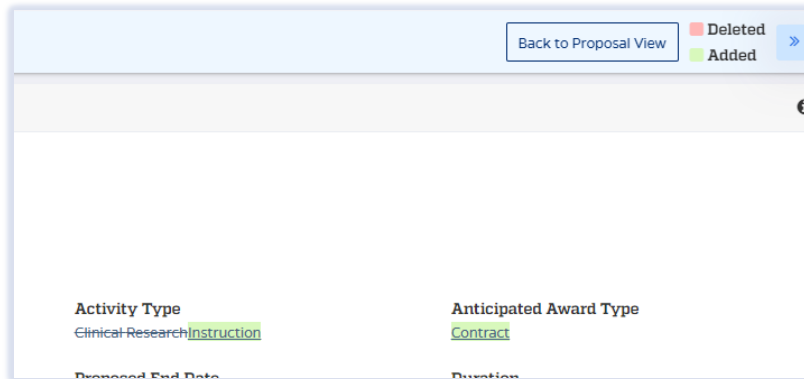


# To cancel an Admin Correction without saving:

☐ Click on the More Actions icon [⋮] and choose **Cancel Admin Correction** from the dropdown menu.

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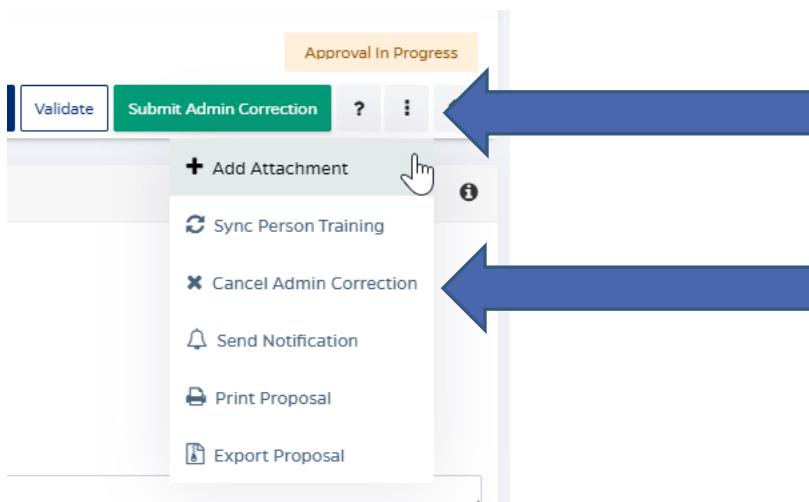
# SERVICE REQUEST REVIEW

☐ Click on the **Service Request** (SR) tab and then click on the **Service Requests Pending My Review** tab.
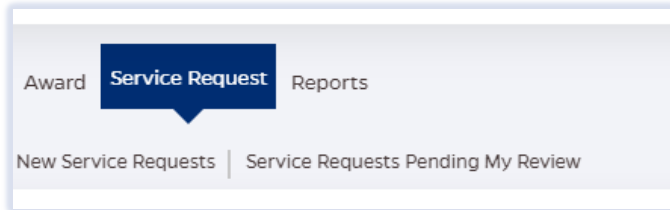


OR

☐ Click on the SR from the **Action List** widget on the Dashboard.

☐ Click on the desired SR to review.
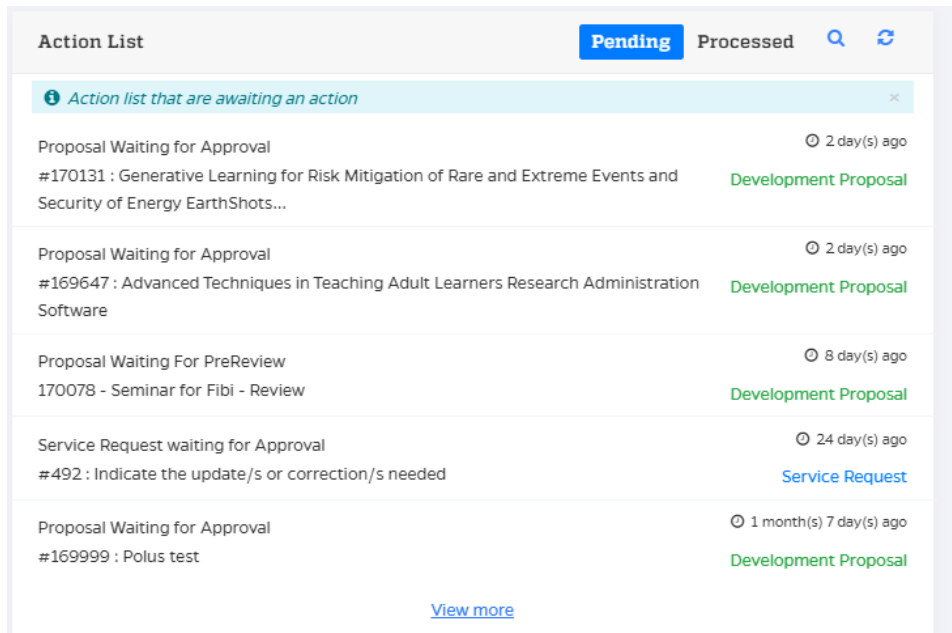


☐ Review all tabs in the Service Request and click on **Return** or **Approve** as desired.

☐ Enter any comments and confirm by clicking on **Return** or **Approve** as appropriate.



☐ Status will change to **Approved.**
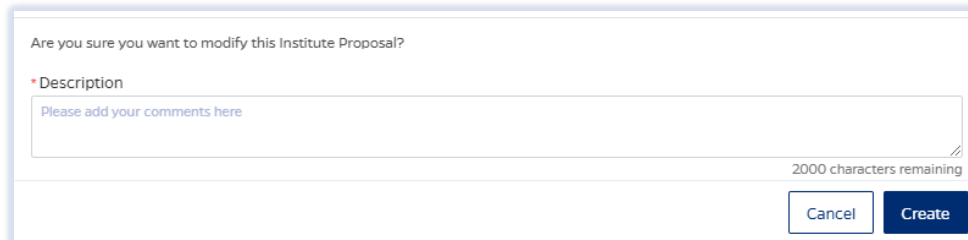
# INSTITUTE PROPOSAL MODIFICATION

☐ Click on the Institute Proposal tab.

☐ Click on the **More Actions** icon [⋮] and choose **Modify Institute Proposal** from the dropdown menu.
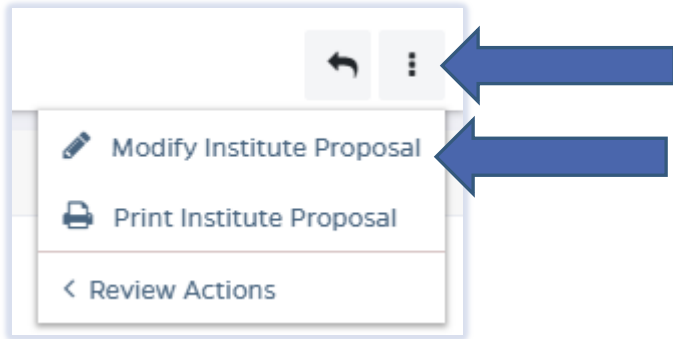


☐ Enter a description and click on **Create** button.



☐ Make desired changes in the record.
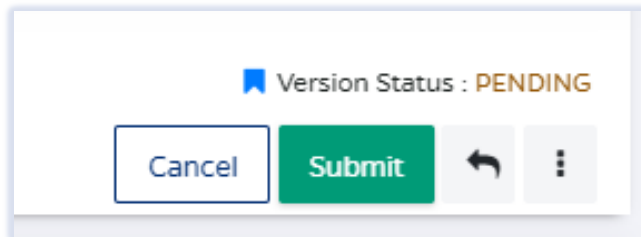
☐ Click on **Submit**.



☐ Click on **Save & Submit** button to confirm.

# To review IP Modifications:

☐ Click on **Institute Proposal** tab.
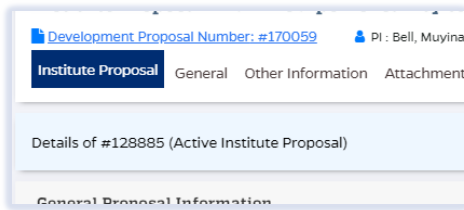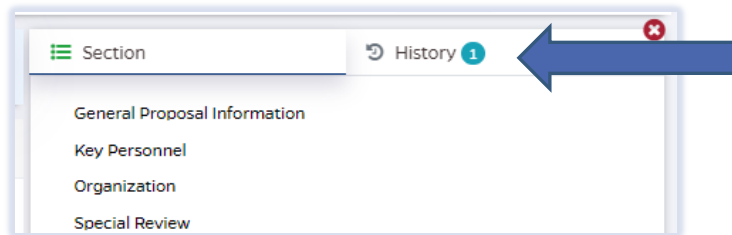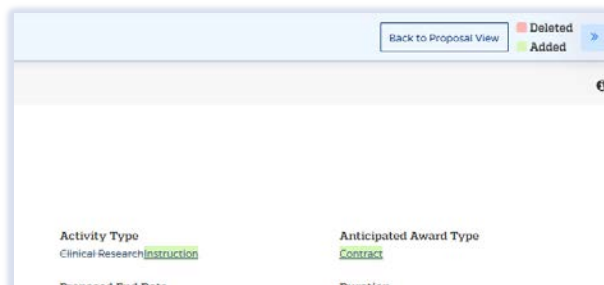


☐ Click on **History** in upper right corner.



The **Version History** will open:

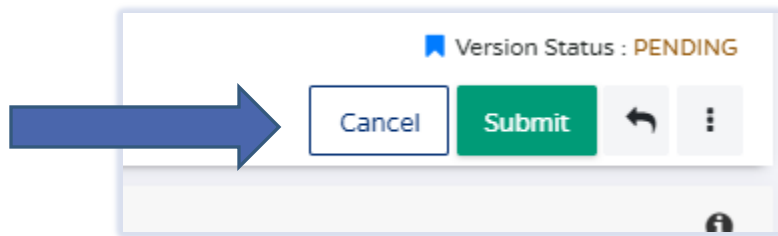☐ Click on the **Version** you want to review and the following will open:
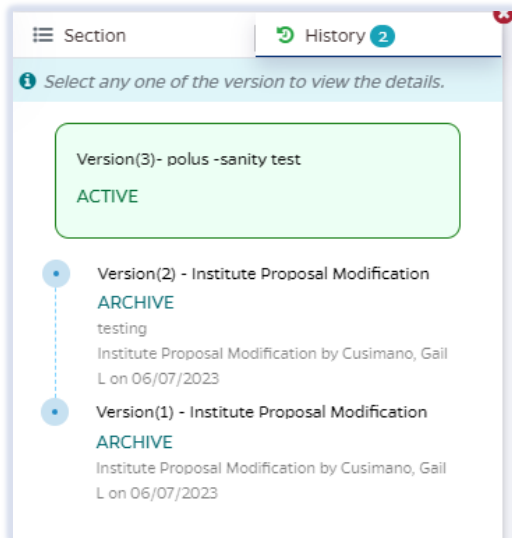


☐ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.
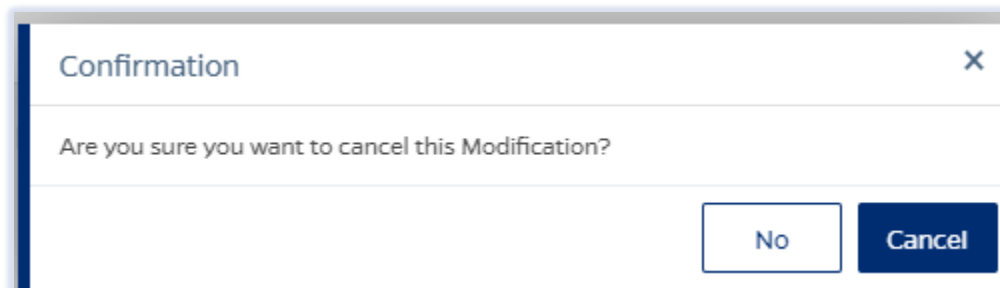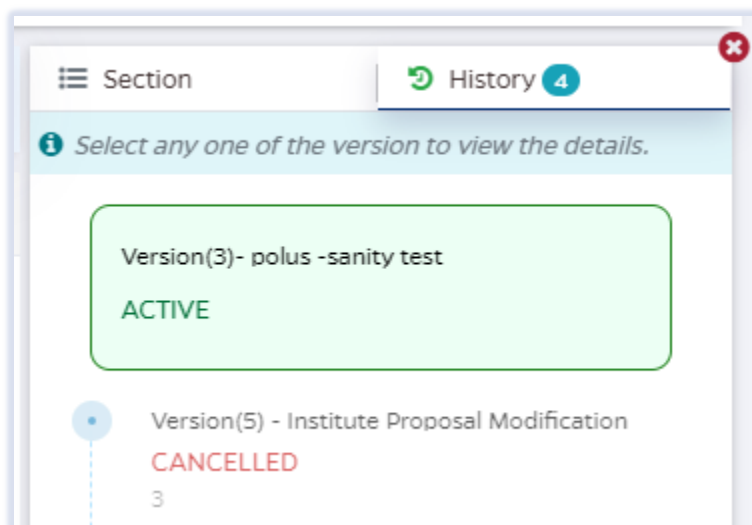
## To cancel an IP Modification without saving:

☐ Click on the **Cancel** button.
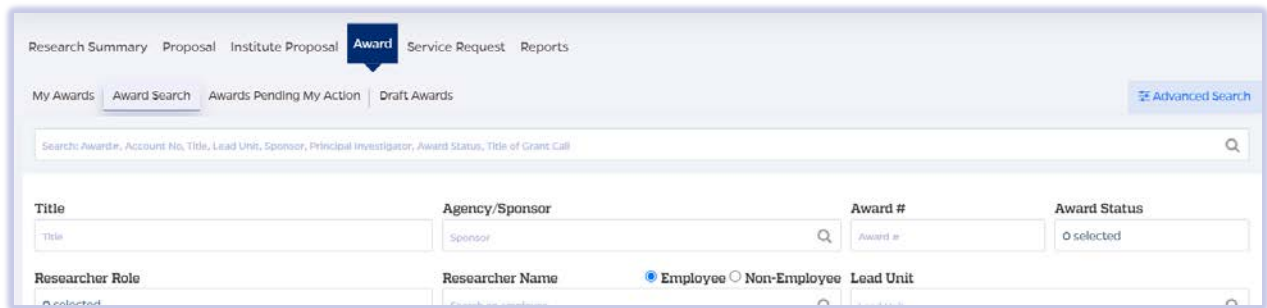


☐ Then click on Cancel to confirm.



The IP Modification will show as Cancelled in the **History**.
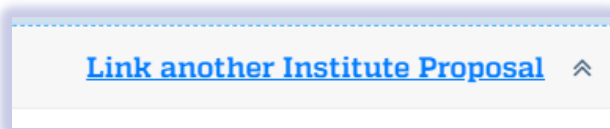
# LINKING A SUPPLEMENT TO AN AWARD

From the Award Module:



- ☐ Find the **Award** under the **Award Search** and click on the link which opens the award.

- ☐ Click on the **More Actions** icon ⋮ and choose **Admin Correction** from the dropdown menu.



- ☐ Enter a description that says Link supplement and click on Create.



- ☐ Click on Link another Institute Proposal.



- ☐ Enter the IP information in the **Proposal Funding this Award** field.

☐ Click on **Link Proposal** button.



☐ Click on the **Submit Admin Correction** and choose **YES** to confirm.