

# 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

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# **APPROVAL**

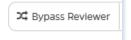
- □ Open a proposal with a status = Approval in Progress.
- Review all tabs and print a PD Summary (see instructions on the next page). Note: The Proposal tab is a summary of all information contained within the record.
- Either **Return** or **Approve** the record as desired.

		App	roval li	n Prog	ress
	Return	Approve	?	:	+
E Section					

□ Include **Comments** as needed and confirm **Return** or **Approve**.

Return Proposal #169521		×	
Principal Investigator Bell, Muyinatu	Lead Unit 10100801 - OFFICE OF RESEARCH INFORMATION SYSTEMS	Status Approval in Progress	
omments			
Add files	MB : pdf,doc,docx,csv,xml,ppt,pptx,txt,xls,xls,		
	, pul, doc, docx, csv, x111, ppc, ppcx, cxc, x13, x13	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
			2000 characters remaining
	Drop your file here or Choose File	(5)	advert scheres on a remaining
	Drop your file here or Choose File	(S) 2000 characters remaining	Cancel Approve

### To Bypass an approver:



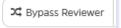
Occasionally, a Dept. Business Office will need to approve a record, but the individual is unable to access the system and will email the Research Administration Office asking to Bypass their stop. It is recommended to note that a Department made this request via email. The email can be attached to the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

Click on **Route Log** tab.





#### Click on **Bypass Reviewer**.



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

Bypass Proposal #170078		×
Principal Investigator Bell, Muyinatu	Lead Unit ELECT & COMP ENG - BELL	Status Approval in Progress
* Comments		
		2000 characters remaining
		No Bypass

### To Add an Alternate Approver:

4 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.

Route Log		
Stop 1		4 Add Nethoprover
Walting for approval	着 Fehskens, Edward H 🏴 Primary Approver	X Bypass Reviewer 🏼 🏕 Alternate Approver
Waiting for approval	Gasior, Angel	
Waiting for approval	Joynes, Denelle L	
Walting for approval	Gilchrist, Zipporah	

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

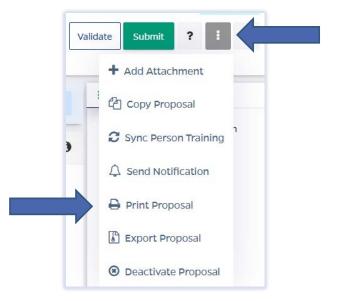
Add New Approver

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.

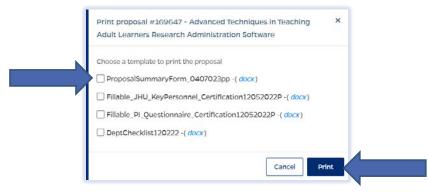


### To Print or View the PD Summary:

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.



	Pibi			PKINS UNIVE SUMMARY F		
	Proposal ID: 169647			Institute Pr	oposal Number:	
		KEY PERSONNE	L			
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 INFORMA	ΠΟΝ			
Sponsor (Application to	: 300023 - ADVANCED BIONICS	CORPORATION (ABC)				
Sponsor Type: Private P	Profit	Spor	nsor Deadline	2:		

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.

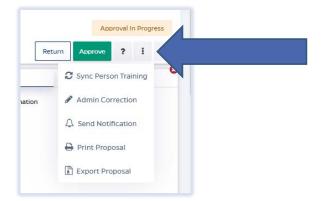


Click on Save, Save As or Print as needed.



# **ADMIN CORRECTION TO A PROPOSAL**

- **Open a proposal with a status = Approval in Progress.**
- Click on the More Actions icon.

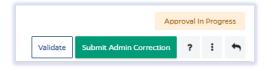


Choose Admin Correction from the dropdown menu.

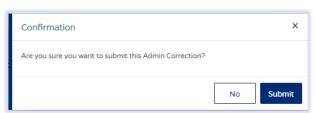
- Admin Correction
- Click on **Create** button.

	Create Admin Correction		×
c	Are you sure you want to create an Admin Correction?		
		No	Create

- □ Make desired changes in the record.
- Click on Submit Admin Correction.



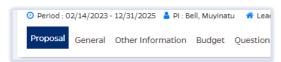
Click on the **Submit** button to confirm.



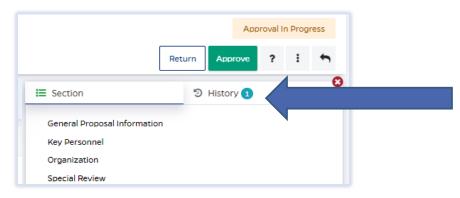


### **To review Admin Corrections:**

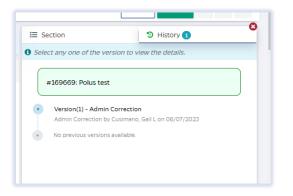
Click on **Proposal** tab.



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



#### The Version History will open:

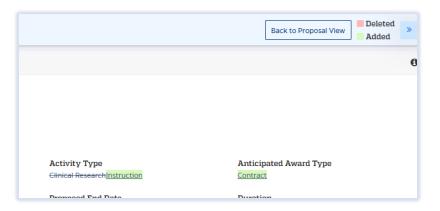


□ Click on the **Version** you want to review and the following will open:

Compare with Active Proposal	»	E Section	History 1	
		<b>1</b> Select any one of the ve	rsion to view the details.	
	0	#169669: Polus test	t.	
		Version(1) - Admin		
		No previous versions	/ Cusimano, Gail L on 06/07/2023	

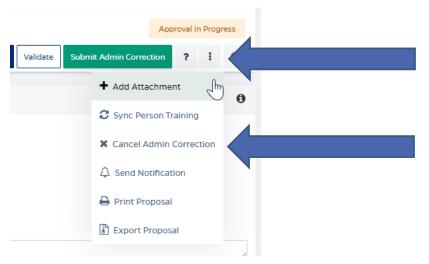


□ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.



### **To cancel an Admin Correction without saving:**

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





## SERVICE REQUEST REVIEW

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

Award	Service Request	Reports
New Serv	rice Requests   Se	rvice Requests Pending My Review

#### OR

- Click on the SR from the **Action List** widget on the Dashboard.
  - □ Click on the desired SR to review.

Action List Pending P	Processed Q 🖸
• Action list that are awaiting an action	×
Proposal Waiting for Approval #170131 : Generative Learning for Risk Mitigation of Rare and Extreme Events and Security of Energy EarthShots	② 2 day(s) ago Development Proposal
Proposal Waiting for Approval #169647 : Advanced Techniques in Teaching Adult Learners Research Administration Software	O 2 day(s) ago Development Proposal
Proposal Waiting For PreReview	Ø 8 day(s) ago
170078 - Seminar for Fibi - Review	Development Proposal
Service Request waiting for Approval	② 24 day(s) ago
#492 : Indicate the update/s or correction/s needed	Service Request
Proposal Waiting for Approval	② 1 month(s) 7 day(s) ago
#169999 : Polus test	Development Proposal
View more	

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

#492: Indicate the update/s or con Reporter: Polus Admin & Department : 1650000 Overview Comments Questionnaire Hist	00 - SCHOOL OF NURSING O Priority : Normal		Request Status : Approval in Progress Return Approve in 1
Summary		0	O Duration(s)
Priority Normal	Department SCHOOL OF NURSING		Approval in Progress 04/06/2023 3:13:22 AM Stee Duration: 2 month(s) 3 day(s)



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

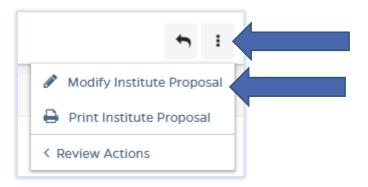
Return Service Request	×	
Comments		
Add files	2000 characters remaining	
<b>6</b> Support following files under 50 MB : pdf,doc,docx,csv,xml,ppt,pptx,txt,xls,xlsx,zip,ison,		
<u>A</u>		
Drop your file here or Choose File (s)		
	Close Return	Ар

□ 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.

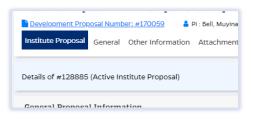
	Version Statu	us : PEN	DING
Cancel	Submit	ţ	:

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

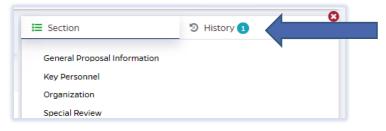


### To review IP Modifications:

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:

<b>i≡</b> Se	ction	History 2
🕄 Selea	ct any one of the ver	sion to view the details.
	/ersion(3)- polus -sani ACTIVE	ty test
•	ARCHIVE testing	e Proposal Modification
	ARCHIVE	Proposal Modification

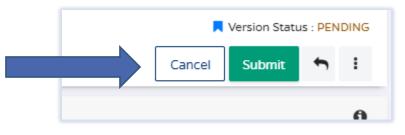
□ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.

	Back to Proposal View Added
	0
an an a mar show	
Activity Type	Anticipated Award Type
Clinical Research	Contract
Desmand Field Date	Description



### To cancel an IP Modification without saving:

Click on the **Cancel** button.



□ Then click on Cancel to confirm.

Confirmation		×
Are you sure you want to cancel this Modification?		
	No	Cancel

The IP Modification will show as Cancelled in the History.

E Section	ව History 🕢
Select any one of the v	version to view the details.
Version(3)- polus -s ACTIVE	anity test
• Version(5) - Instit CANCELLED 3	tute Proposal Modification



# LINKING A SUPPLEMENT TO AN AWARD

From the Award Module:

esearch summary proposal inserv	Service Request Reports		
Awards Award Search Awards Pe	nding My Action   Draft Awards		훈 Advanced Sear
Search: Awardin, Account No, Title, Lead Unit, 5	Sponsor, Principal Investigator, Award Status, Title of Grant Call		٥
Fitle	Agency/Sponsor	Award #	Award Status
Fitle This	Agency/Sponsor Sponsor	Award #	Award Status O selected
Title Title Researcher Role	Spensor		Award Status

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.

Period : 01/01/2022	- 10/31/2022 🛔 PI : Robfogel, Samuel S 🛛 😵 Lead Unit : 21	500000 - CENTER FOR TALENTED YOUTH R Award Statu	is : Terminated	Version Status : A	ACTIVE
ward Overview	Other Information Tasks Dates & Amounts Budget	& Expenses Cost Share Attachments Questionr	naire Report Summary Report Req.	f≣Tasks I	5
nyments Terms	Outcomes Permissions Hierarchy Medusa Histor	гу		Admin Correction	-
oposal Funding	this Award			Print Award	^
roposal Number	Title	Lead Unit	Agency/Sponsor		on
2108962	UAE 2022 Summer Program - Sandooq Al Watan	21500000 - CENTER FOR TALENTED YOUTH	312545 - SANDOOQ AI WATAN (S	+ Add Child Award	
				🕒 Generate Award Notice	
eneral Award In				lm	0

#### **□** Enter a description that says Link supplement and click on Create.

min Correction 140874-00002:UAE 2022 Summer I	Program: UAE 2022 Summer Program X
Description	
Link Supplement	<b>?</b>
	3985 characters remaining
	Cancel

#### Click on Link another Institute Proposal.



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



Proposal Funding this Award		
2105444 I	×	
21054442   AI Institute: On Dynamic, Resilient Engineered Environments   RUTGERS UNIV   ChemBE - KEVREKIDIS   Organized Research   New   Kevrekidis, Yannis G   Pending		Lead
 21054443   2021-2022 DePuy Synthes Scientific Research Fellowship   MEDICAL DEVICE BUSINESS SERVICE INC   PLASTIC & RECONSTRUCTIVE SURGERY   Instruction   New   O'Brien-Coon, Devin   Not Funded	s	CEN

#### Click on Link Proposal button.

Proposal Funding this Award				*
Al Institute: On Dynamic, Resilient Engineere	d Environments	×		
Title # 21054442 : Al Institute: On Dynamic, Resilier	it Engineered Environments		Status	
Lead Unit 12024034 - ChemBE - KEVREKIDIS	Agency/Sponsor RUTGERS UNIV			Link Institute Proposal
Proposal Number Title		Lead Unit	Agency/Sponsor	Status Actions

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

140874-00002: UAE 2022 Summer Program: UAE 2022 Summer Program           Period : 01/01/2022 - 10/31/2022         A PI : Robfogel, Samuel S         C Lead Unit : 21500000 - CENTER FOR TALENTED YOUTH	Award Status : Terminated	R Budge	et Status : To Be Posted	R Version Sta
ward Overview O Other Information Tasks O Dates & Amounts Budget & Expenses O Cost Share Questionnaire Report Summary O Report Req. O Payments O Terms O Outcomes O Permissions	and a second	Validate	Submit Admin Correc	tion
listory				

