



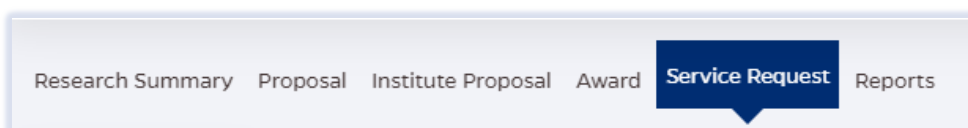
Create a Service Request

Material Transfer Agreement (MTA)

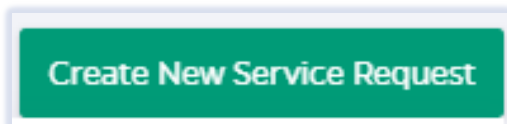
How do I create a Service Request for an MTA?

- ❖ Material Transfer Agreement (MTA) was previously known as Negotiation Only in Coeus. This type of Service Request is only applicable for School of Medicine contracts. These requests should never involve funding.

- ❑ 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 screenshot shows a form titled "Overview" with a "Request Status: Draft" indicator. The form includes fields for Priority (set to Normal), Department (10100801 - OFFICE OF RESEARCH INFORMATION SYSTEMS), Category, Type, Subject, and Description. A "Save" button is at the bottom right. Arrows point to the Priority and Department fields.

- ❑ The **Priority** dropdown menu can be changed if needed to *low* or *high*.
- ❑ The **Department** field is also editable, but defaults to the user's primary unit (cost center). To change this field, begin typing the unit name and a dropdown menu with options will open.
- ❑ Choose the **Category – Service Request** from the dropdown menu.

- ❑ Choose the **Type – Material Transfer Agreement (SOM only)** from the dropdown menu.


- ❑ Complete the **Link Award** field as appropriate. This field will not show if the user chooses the Service Request Type.

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 complete, the tab will change to **green**.

- ❑ Click on the **More Actions** button in the upper right hand corner. 

- ❑ Click on **Print Service Request**.

