



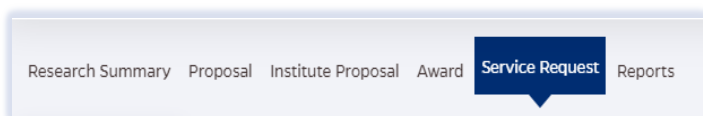
Create a Service Request

PI Change (Prior Approval)

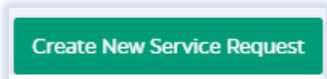
How do I create a Service Request for a PI Change - Prior Approval?

❖ PI Change Prior Approval was previously known as Administrative Action 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.



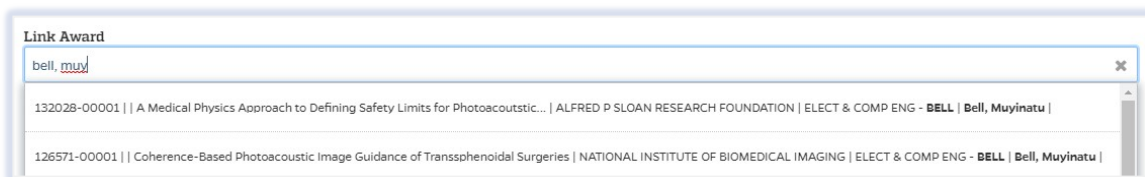
The following screen will open:

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

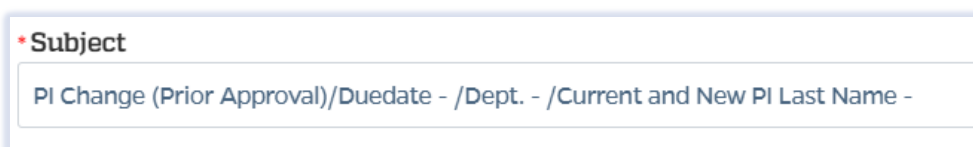
- The **Department** field is the lead unit or first 8-digits of the cost center. Begin typing the unit name and a dropdown menu with options will open.
- Choose the **Category** – **Award** from the dropdown menu; in order to link to the award.
- Choose the **Type** – **PI Change Prior Approval** from 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.

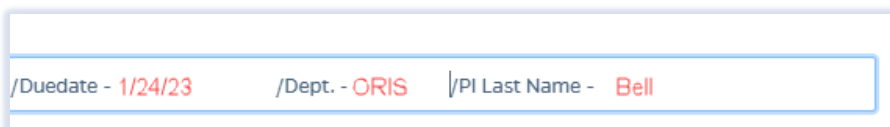
Once the appropriate award appears, click on the award in the dropdown menu.





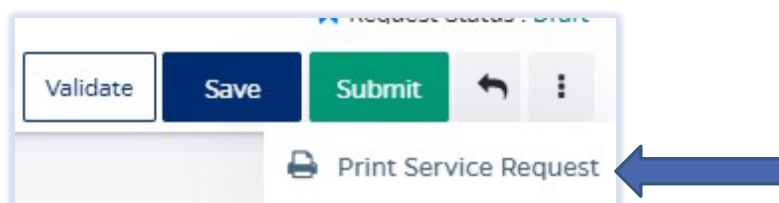
- Complete the Subject line in the **Subject** field. The first section of the Subject is the type of Service Request followed by other identifying information that the user will need to input.



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** icon  in the upper right corner.
- Click on **Print Service Request**.

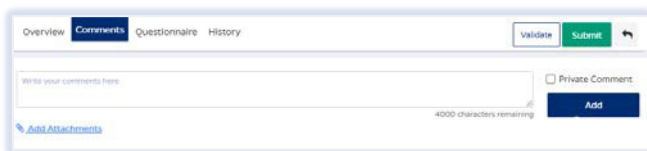


- Choose **PIChangePriorApproval** from the list in the dropdown and then click on **Print**.
- Send the fillable form to the PI to be completed and signed.
- Complete all Questionnaire tabs according to the PIs provided answers.
- Upload the signed fillable form to the Service Request where the PI Certification 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.



- 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.



If the Submit button does not show, the user will need to contact ORIS by emailing oris@jhu.edu to request access to the lead unit input on the General tab.