



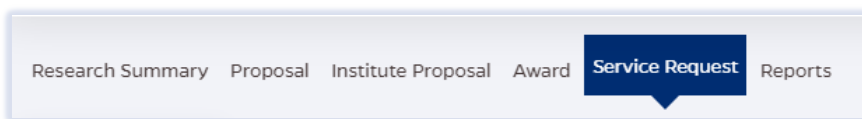
Create a Service Request

Prior Approval - Other

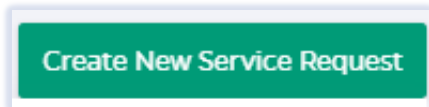
How do I create a Service Request for a Prior Approval - Other?

- ❖ Prior Approval – Other is a Service Request for Prior Approvals that do not include a PI Change, Carryover of funds or a Foreign Component. It was previously requested as an Administrative Action in Coeus. This type of proposal was not migrated to Fibi.

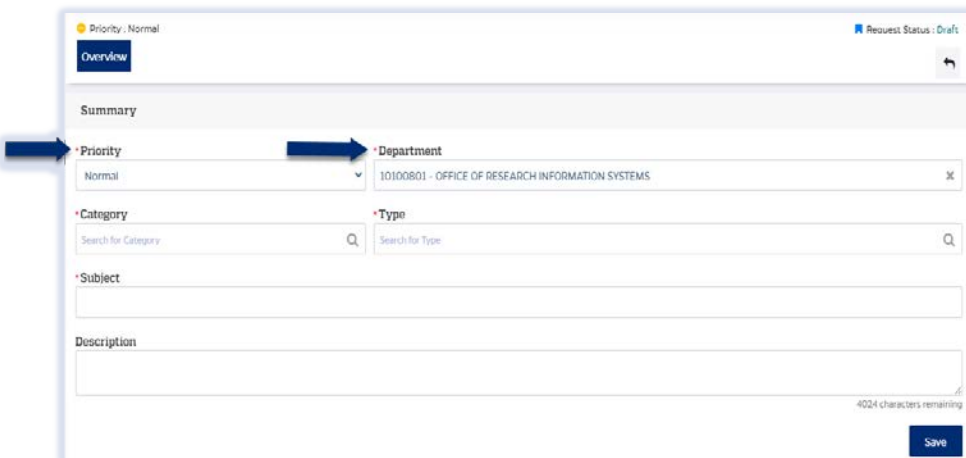
- ❑ From the Dashboard, click on **Service Request** in the top row.



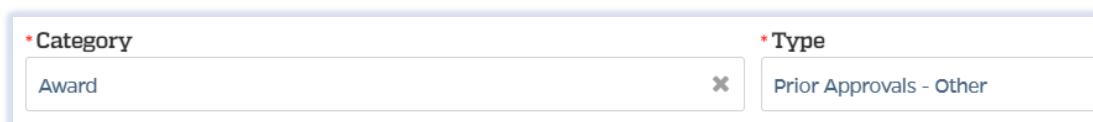
- ❑ Click on the green **Create New Service Request** button in the upper right corner.



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: Prior Approval - Other** 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** button  in the upper right corner.
- ❑ Click on **Print Service Request**.

- ❑ Choose **PriorApprovalOther** 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.

