



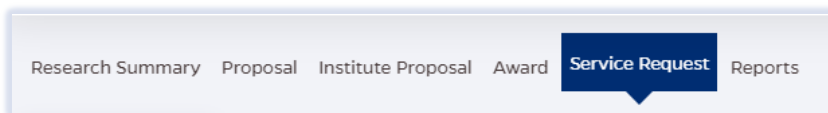
Create a Service Request

Progress Report/Continuation/Modification of a Grant or Subgrant

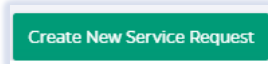
How do I create a Service Request for a Progress Report/Continuation/Modification of a Grant or Subgrant?

❖ Progress Report/Continuation/Modification of a Grant or Subgrant was previously known as Continuation 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 screenshot shows a web form for creating a service request. At the top, it indicates 'Priority: Normal' and 'Request Status: Draft'. Below this is a 'Summary' section with several fields: 'Priority' (set to Normal), 'Department' (10100801 - OFFICE OF RESEARCH INFORMATION SYSTEMS), 'Category' (with a search box), 'Type' (with a search box), 'Subject' (text input), and 'Description' (text area with a 4024 character limit). A 'Save' button is at the bottom right. Blue 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 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: Progress Report/Continuation/Modification of a Grant or Subgrant** from the dropdown menu.

This close-up shows the 'Category' dropdown menu set to 'Award' and the 'Type' dropdown menu set to 'Progress Report/Continuation/Modification to Grant or Subgrant'.


- ❑ 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.

- ❑ Keep the type of Service Request in the Subject line that is appropriate and delete the types that do not apply. So, if this is a **Progress Report**, delete **Continuation/Modification of a Grant or Subgrant**.
- ❑ 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 **ProgressRprt_Cont_Mod4GrantorSub** from the list in the dropdown and then click on **Print**.

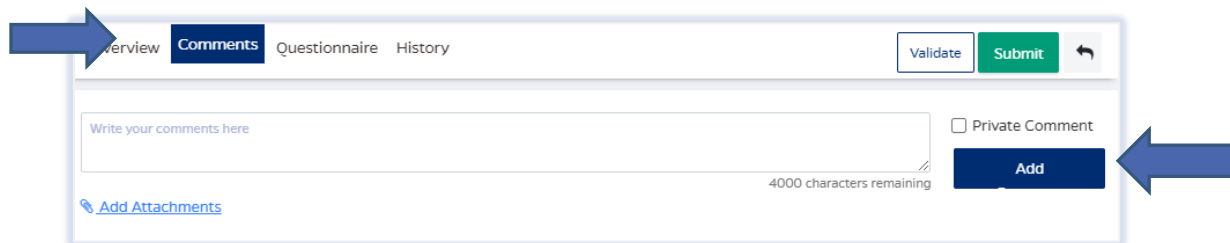
Send the fillable form to the PI to be completed and signed.

- ❑ 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, xls, xsm, 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.