



**Fibi Guide for Department Users:
How to Create a Proposal and Service Request
Version 5.0**

For up-to-date information and other Resources, please visit:

<https://research.jhu.edu/oris/>

Last Updated:

12/16/2024

Table of Contents

Coeus – Archive.....	3
Access –	3
General Information about Fibi.....	3
Icons and Symbols	4
Landing Page – Dashboard - Research Summary Tab.....	5
Widgets.....	5
Notifications Preferences.....	9
Overview of Systems	11
Creating an Original Proposal	12
General Tab.....	13
Status	19
Tabs in the Proposal Record	25
Proposal	25
Other Information	25
Budget.....	26
Questionnaire.....	29
To print the blank questionnaires and certifications for signing.....	30
Attachments	31
Comments.....	33
Permissions	34
Tasks (pre-review)	35
Technical Support	36
Certification.....	37
Route Log	38
Validate and Submit	39
PD Summary.....	40
Recall.....	42
Creating a Service Request.....	43
Medusa.....	47
Deactivate a Proposal Development Record	48
Appendix A - Proposal Type Chart.....	50
Appendix B - Activity Type Chart.....	51

Coeus – Archive

Coeus has been archived. It no longer is available for submitting proposals, but it is accessible to see information previously submitted before Fibi was implemented. Limited data has been migrated into Fibi from Coeus including:

- All submitted PDs
- PDs with a sponsor deadline 30 days or less from date of go-live (with status of In Progress, Rejected or Recalled).
- All IPs from FY 2006 to present.
- IPs older than 2006 that are attached to SAP grants.
- All awards in SAP.

Access –

Fibi is a web-based application. For best performance, use Chrome, Edge, or Firefox as the web browser. Internet Explorer is not supported.

If the user is accessing Fibi and off-campus, then the VPN (Virtual Private Network) must be connected before Fibi can be accessed.

- Go to – <https://fibi.johnshopkins.edu/fibi/>
- If the SSO does not automatically log you in, enter your JHEDID and password as you do to login to your computer.


























General Information about Fibi

Proposals are entered into Fibi and routed to approvers. Many departments review their own proposals before they are then routed to the Research Administration Office. Once the proposal has been routed to the Research Administration Office, it is reviewed for completeness, accuracy, and compliance. **Research Administration requires 3 business days for a full review.**

The proposal is reviewed in Fibi and in some cases, the Sponsor's Portal as well. Proposals are reviewed for both compliance with JHU requirements and compliance with the Sponsor's requirements. Once the review is complete, the Research Administration Office may have more questions and return the record to the submitting department for follow-up actions.

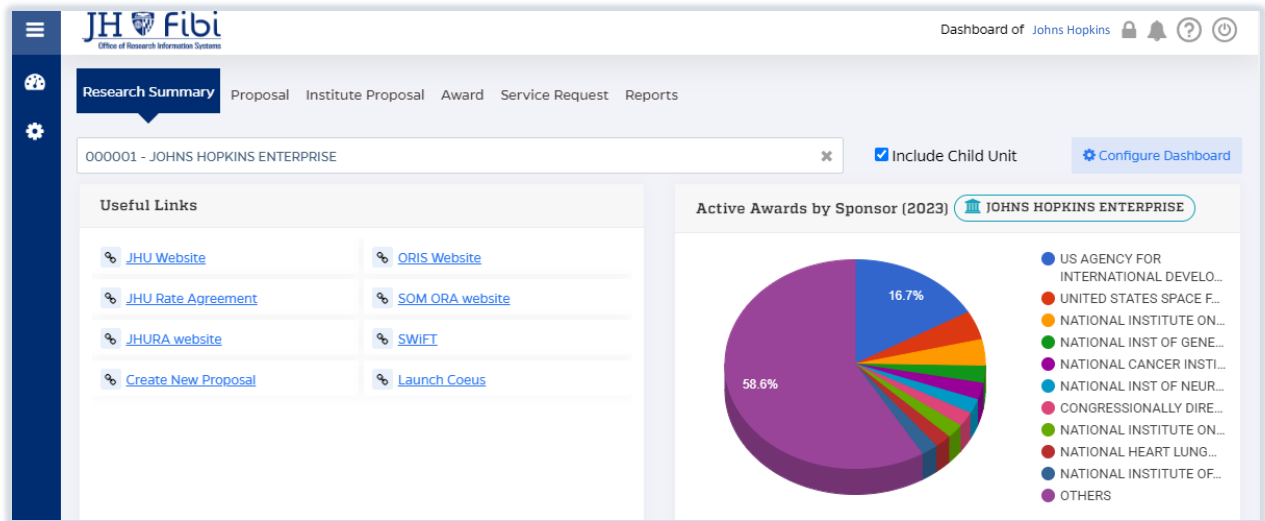
Once a proposal is approved by the Research Administration Office, an Institute Proposal is created in Fibi and if the Proposal is funded, SAP will feed Award information to Fibi.




Icons and Symbols

Icon	Description
	Information - last updated by / created by username, date and time
	View or open
	Copy
	Edit
	Export Proposal
	Delete
	Save
	Request for Support/More Information
	Close
	Download
	View previous versions
	Replace file
	Expand/Collapse
	Add Personnel
	Lead Unit
	Calendar
	Help Text
	More Actions
	Go back
	Search
	User Preferences
	FAQ
	Logout

Landing Page – Dashboard - Research Summary Tab

The user's Landing Page, also known as the Dashboard, will look similar to this:

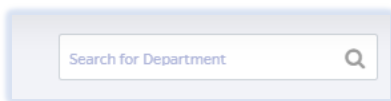


- Choose the **Dashboard icon**  in the upper left corner to bring you back to the landing page/dashboard at any time, see above.
- Choose the **Preferences icon**  in the upper left corner of the screen to change the notifications received.
- Choose the **Configure Dashboard icon**  located in the upper right corner of the **Dashboard** to change the widgets visibility and location on the landing page.

Widgets



Widgets are the boxes that show on the landing page which show data, useful links, support requests and action items for the specific user. These widgets can be moved and turned on and off as specified by the user.

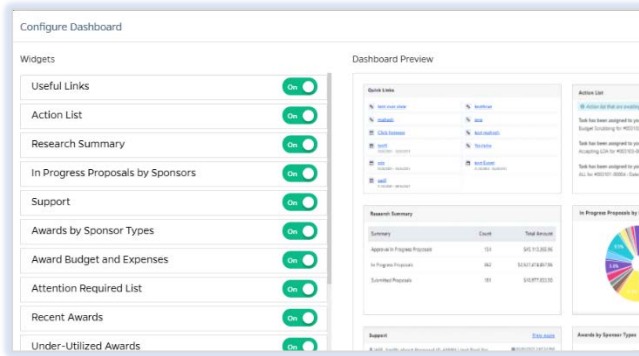
In the upper right corner, you can choose the department or Research Administration Office groupings to apply to some of the widget information displayed.




If nothing is entered in this field, the information will default to the user's home lead unit. The user will not be able to access other departments unless the user has assigned roles and rights in those cost centers. ORIS can assist with granting access.

To change the layout of the Dashboard Landing page:

- ❑ Click on the **Configure Dashboard icon**  in the upper right corner of the screen.
- ❑ Turn **Widgets** on and off by choosing the toggle button  next to each Widget until it displays your desired choice, either **On** or **Off**.
- ❑ Click and drag the widget desired to move it in order on this page. The widget will move on the **Dashboard Page** to the order you selected.



To Set a Default Unit for data showing in the Widgets:

- ❑ Click on the **Configure Dashboard icon**  in the upper right corner of the screen.
- ❑ Enter the Lead Unit # or part of the name in the elastic search and choose appropriately from the dropdown menu.
- ❑ Check the “Include Child Unit” box if children units should be included. Uncheck if only the Default Unit is desired.

Set Default Unit

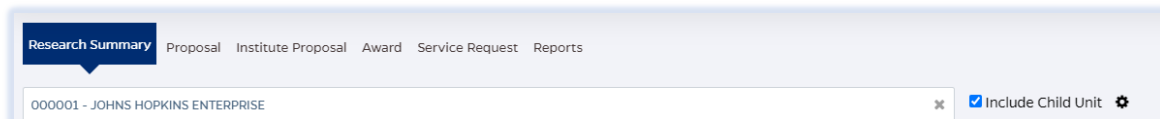
Choose the Default Unit to filter widget data; only one unit can be set as the default.

Search for Unit

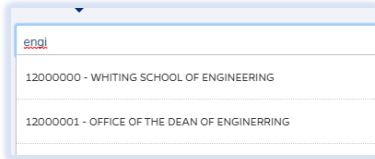
Include Child Unit

Using Widgets

Certain Widgets can display data by specified departments. If the user has access to multiple departments, the filter can be changed at the top of the screen to apply to various widgets.

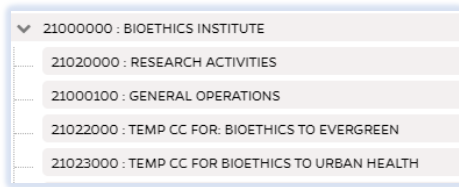


- ❑ Begin typing part of the name of the department and a dropdown menu will populate and then choose the department from the dropdown menu.



- ❑ Check or uncheck the Child Unit box as desired. Include Child Unit

A Child Unit falls under the Parent Unit in the Unit Hierarchy. For example, Bioethics Institute is the Parent Unit and the Units below are the Children Units.



Widget Chart

Widget Name	Description
Action List	Widget that displays the logged in user's pending action items. Shows outstanding actions related to Pre-review, Certification, Routing, Service requests, etc.
Active Awards by Sponsor	<p>Pie chart shows the count of active awards for the fiscal year displayed with the status of active for all Sponsors.</p> <ul style="list-style-type: none"> • The pie wedges show the percentage of total awards as well as the total amount of the awards from each sponsor. • The widget shows the top 10 sponsors and then combines the rest of all sponsors into Others. • The widget can display the information by lead unit. User must have VIEW_PROPOSAL right either in the Lead unit or for the Proposals. • The count is hyperlinked to a list of records making up the totals displayed.
Active Awards by Sponsor Types	<p>Table shows the count of active awards for all Sponsor types.</p> <ul style="list-style-type: none"> • The rows show the Count as well as the Sum of the Award Anticipated from each sponsor type. • The count is hyperlinked to a list of records making up the totals displayed.
Awards by Sponsor Type	<p>Pie chart shows the count of awards shown against each Sponsor Type.</p> <ul style="list-style-type: none"> • Financial Year is the start date of the Award. • Lists the major sponsors in the Pie Chart; awards belonging to the remaining sponsors will be listed as "other." • Award status not equal to Pending.

In Progress Proposals by Sponsors	<p>Pie chart shows the count of Proposals for each Sponsor with a status of <i>In Progress</i> and <i>Rejected/Recalled</i>.</p> <ul style="list-style-type: none"> • Financial Year is the start date of the Proposal. • Lists the top 10 sponsors by name; proposals belonging to the remaining sponsors types will be listed as "other". • User must have VIEW_PROPOSAL right either in the lead unit or in the Proposal.
Institute Proposals by Sponsor – Current FY	<p>Table shows Institute Proposals for all of JHU by Sponsor for the Current FY</p> <ul style="list-style-type: none"> • Each row displays Pending, Not Funded, Funded, and Withdrawn IPs. • The count has a hyperlink; upon clicking, the user will be directed to a list of records that make up the totals displayed.
Pending Institute Proposals by Sponsor Type	<p>Table shows Institute Proposals by Sponsor Type</p> <ul style="list-style-type: none"> • Each row displays the count and total request amount of funding • The count has a hyperlink; upon clicking, the user will be directed to a list of records that make up the totals displayed.
Pending Proposals and Active Awards by Sponsors	<p>Table displays the Count as well as the Sum of requested dollars for pending proposals of the sponsor selected in the first row and the Count as well as the Sum of requested dollars for awards from the selected sponsor in the second row.</p> <ul style="list-style-type: none"> • The count has a hyperlink; upon clicking, the user will be directed to a list of records that make up the totals displayed. • Pending proposals are the list of proposals with status "Not awarded." • The user can switch between <i>Sponsor</i> and <i>Sponsor hierarchy</i> in order to search for various sponsors to display
Proposals by Sponsor - Current FY	<p>Table shows the count of Proposals submitted and awarded in the current Financial Year against each Sponsor (<i>Submission date</i> must be in current FY).</p> <ul style="list-style-type: none"> • Lists the major sponsors by Name; proposals belonging to the remaining sponsors will be listed as "other". • User must have VIEW_PROPOSAL right.
Proposal by Sponsor Types	<p>Pie chart displays the percentage of total and the count of Proposals with the statuses for each Sponsor type - <i>Approval in Progress</i>, <i>In Progress</i>, and <i>Submitted</i>. User must have VIEW_PROPOSAL right in either in the lead unit or the Proposal.</p>
Proposal Status Check	<p>Research Administrators can use this widget to estimate incoming workloads for themselves and for their team.</p> <ul style="list-style-type: none"> • Based on the selected deadline date, the widget lists the count of proposals. Users can change the dates in the deadline date filter. • The count is hyperlinked to a list of records making up all the totals displayed. • User must have VIEW_PROPOSAL right either in the lead unit or in the Proposal.
Research Summary	<p>Table lists the count of Proposals and their total budgeted amount by status - <i>Approval in Progress</i>, <i>In Progress</i>, and <i>Submitted</i>.</p> <ul style="list-style-type: none"> • User must have VIEW_PROPOSAL right either in the lead unit or in the Proposal.

Research Summary by Date	Table displays the research summary count based on the proposal created date. <ul style="list-style-type: none"> User can change the time period. The widget lists the proposals count with the status - <i>Approval in Progress, In Progress proposals, and Submitted proposals.</i> User must have VIEW_PROPOSAL right either in the lead unit or the Proposal.
Submitted Proposals by Lead Unit Coming Soon	Table displays a count of proposals submitted and awarded in the current Financial Year by Department. User must have VIEW_PROPOSAL right.
Support	Shows list of Support requests
Useful links	List of useful URLs, including a shortcut to create a Proposal.

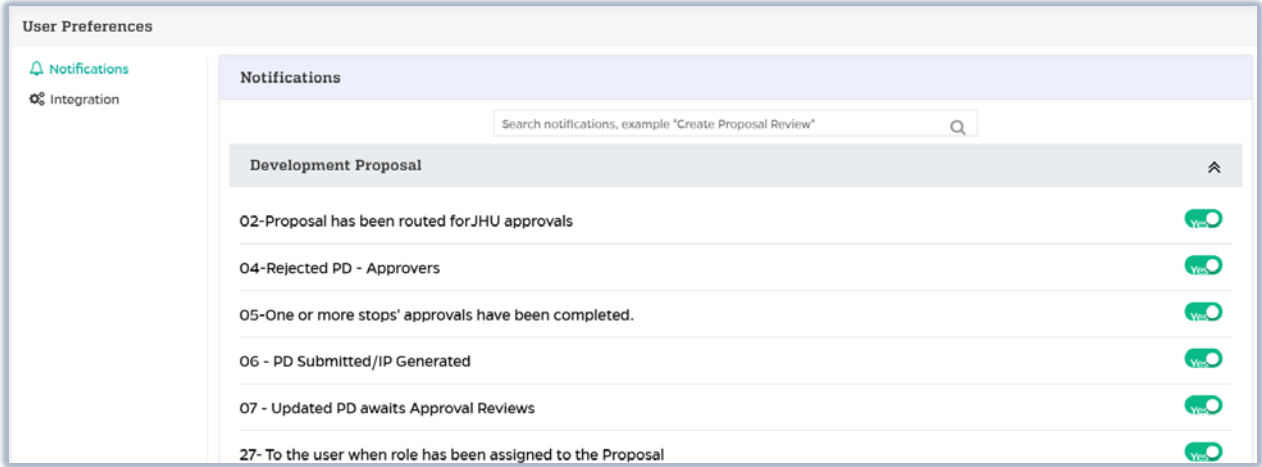
Notifications Preferences

Users have the option to turn individual Email Notification types on or off. In order to turn notifications on or off:

- Go to the Dashboard and click on the **User Preference** icon  in the upper left corner.



The following page will open and then click on the toggle next to the type of notification as appropriate:



Tabs on the Landing Page/Dashboard explained:

When you click on each tab a second menu row may open with more options. Tabs will vary based on your roles and access.

Research Summary - Refers to the **Landing Page/Dashboard**, see previous section. There is no secondary menu for this page.

Proposal – Use the **Proposal tab** to view proposals and create new proposals. The secondary menu opens with the choices: My Proposals and All Proposals.

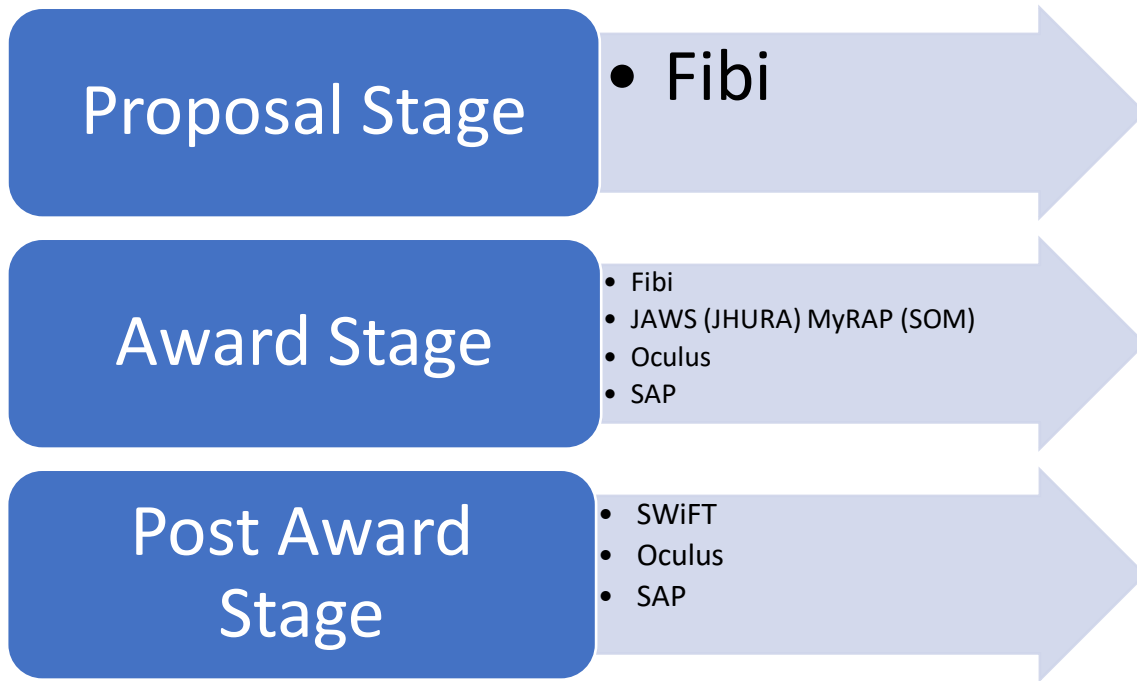
Institute Proposal – Use the **Institute Proposal tab** to find Proposals that have been submitted to the sponsor and have been assigned an Institute Proposal Number (IPN). Statuses include: Pending, Funded, and Not Funded.

Award – Use the **Award tab** to review award information. These records are proposal that have been funded. Statuses include: Active, Inactive, Pre-award, Terminated, Closed, and Hold.

Service Request – Use the **Service Request tab** to complete various requests based on each module – Proposal Development, Institute Proposal, Award and Service Request. Actions not requiring an IPN, can be submitted as a Service Request. More information on Service Requests can be found [here](#).

Reports – Use the **Reports tab** to run **BIRT Reports**. The reports migrated from Coeus and should look familiar to users who run them regularly.

Overview of Systems



Fibi (Previously Coeus): The system of record for **proposals** for the university. Fibi is used at the department level to create proposals and by JHURA/ORA to approve proposals. – Supported by ORIS

JAWS: The JHURA Agreement Workflow System (JAWS) is JHURA's centralized, on-line database for tracking and managing all sponsored agreements, including negotiation, workflow and document storage.

MyRap: MyRAP is an online system developed to provide PIs and their administrative Partners real-time access to the status of their research agreements and contracts as they are being reviewed, negotiated and processed by the Offices of Research Administration. Launched in Fall 2011, the system is used by School of Medicine, Bloomberg School of Public Health, Zanvyl Krieger School of Arts and Sciences, School of Nursing, and Research Projects Administration on behalf of the Whiting School of Engineering and others.

Oculus: Oculus is a workflow tool and **document storage** system. The types of documents currently being stored include grants and research documentation. Oculus is used by JHURA/ORA to workflow award documents for SAP setup.

SAP: SAP is an enterprise-wide suite of applications used to process all **financial** and administrative transactions.

SWiFT: The Subaward Workflow Information Tracking System (SWiFT) is used to input the information required by JHURA/ORA to write a complete **outgoing subaward** and subsequent modifications.

Creating an Original Proposal

All proposals must be submitted in Fibi before they can be submitted to the sponsor in order for Research Administration to properly review and vet information. Only the JHU Central Research Administration Offices (JHURA and SOM ORA) have signing authority.

Three business days are required for full review.

If a proposal is submitted with less than three business days, Research Administration cannot guarantee a full review.

Pro Tip

Start your proposal in Fibi as soon as possible:

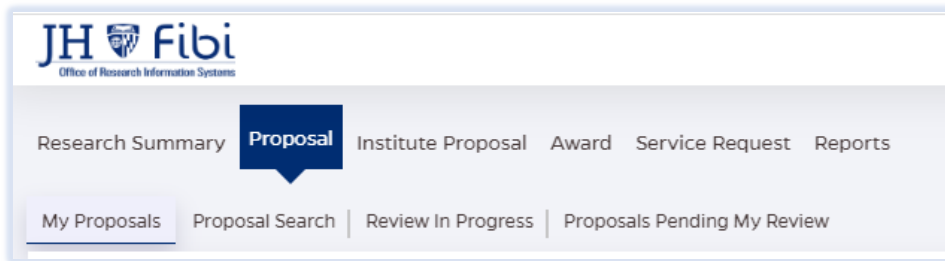
- to be sure the sponsor exists in JHU's systems
- to be sure all JHU personnel exist in JHU's systems
- to determine if other information or actions which involve additional time may be required.

- ❑ Click on **CREATE NEW PROPOSAL** found in the Useful Links widget.

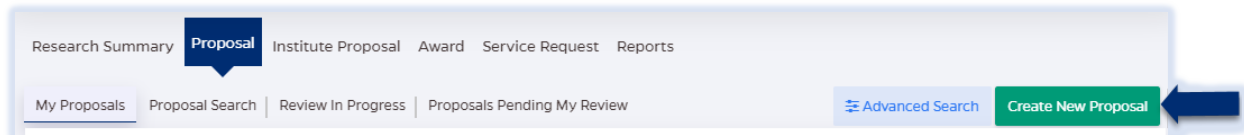


— or —

- ❑ Click on **PROPOSAL** tab.



- ❑ Click on **Create New Proposal** button and the **General Proposal Information** page will open.



General Tab

JH Fibi
Office of Research Information Systems

Dashboard of Gasior, Angel

In Progress

General

Original Institute Proposal #
Type here for Original Institute Proposal #

*** Proposal Title**
Type here for Proposal Title
1000 characters remaining

*** Principal Investigator** Employee Non-Employee *** Lead Unit**
Search an employee Type here for Lead Unit

*** Proposal Type** --Select-- **Proposal In Response** --Select-- *** Activity Type** --Select-- **Anticipated Award Type** --Select--

Agency/Sponsor Type here for Sponsor Name *** Proposed Start Date** MM/dd/yyyy *** Proposed End Date** MM/dd/yyyy **Duration** 0 year(s) , 0 month(s) & 0 day(s)

Prime Sponsor Type here for Prime Sponsor Name **Sponsor Proposal No** **Sponsor Deadline Date** MM/dd/yyyy **Internal Deadline Date** MM/dd/yyyy

Funding Opportunity Number **CFDA Number**

Keywords of Research
Type here for Keyword or add your own Keyword

Abstract
The editor does not support images.

Paragraph A A I U S = : = = " " v ↶ ↷

Proceed

- Complete all fields possible or applicable. You will not be able to proceed unless all required fields are completed. A **Red Asterisk *** denotes information is required. Fields are explained on the next page.
- Click on the **Proceed** button, the Proposal Development Record will be assigned an identifying number by Fibi which is displayed at the top of the record.
- Take note of the PD number for easy reference. This information will appear at the top of the screen in bold, blue text.

General Information Fields Explained

Original Award # (SAP Grant #)


- Enter the original award #, also known as the SAP #, if applicable. SAP Grant numbers contain 6 digits followed by 3 digits. (Example: 624065-001)

This field is an elastic search and awards can also be found with other search terms as described in the field.

This field is **required** if the Proposal Type is Supplement or Renewal. Leave this field blank for New, Resubmission, or Task Order.

Original Award #

Search: Award #, Account#, Title, Principal Investigator, Lead Unit, Sponsor




Original Proposal # (Original IPN)

- Enter the Original Institute Proposal Number (IPN), if applicable.
*This field is required if the Proposal type is Renewal, Resubmission, Supplement, and Task Order.

You can search using various fields if you don't know the IPN. For example, enter text from the title or the PI's name to find the correct IPN in the dropdown.

Original Institute Proposal #

Type here for Original Institute Proposal #



*Proposal Title - REQUIRED

- Enter the title of the research proposal.

Titles need to be descriptive and specific and they need to match exactly on all documentation including the sponsor's portal. This field has a maximum of 1000 characters including spaces. See the sponsor's announcement or guidelines for requirements.

*Proposal Title ⓘ

Type here for Proposal Title

1000 characters remaining


*Principal Investigator (PI) - REQUIRED

- Enter the PI's last name and the dropdown will open with options. Enter *LAST NAME, FIRST NAME*.

*Principal Investigator

Employee Non-Employee

Search an employee



PIs must always be a JHU employee/faculty, so the **Employee** button must be chosen.

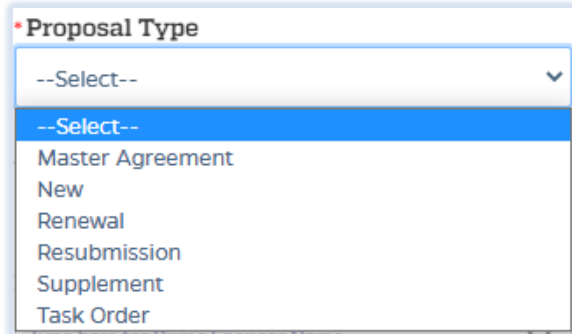
***Lead Unit – REQUIRED – automatically populates**

This field will automatically populate based on the PI's home unit. If the user does not have access to the PI's lead unit, it will remain blank. The dropdown will only display units in which the user has access.

The Lead Unit can be changed manually. Enter the unit as appropriate and a dropdown of available choices will show.

***Proposal Type - REQUIRED**

- ❑ Select the appropriate entry from the drop-down list. This information may be specified in the sponsor's announcement or guidelines.

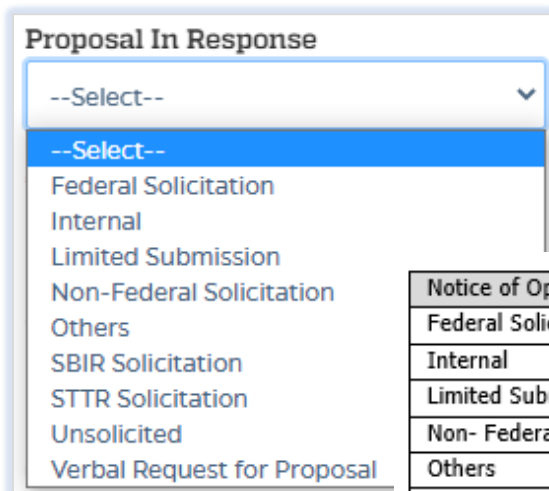


More detailed information can be found in the Proposal Type Chart – [Appendix A](#).

Notice that some of the Proposal types previously in Coeus have now been converted to Service Requests in Fibi. The purpose of Service Requests is to streamline the effort required to input and review these actions. If a new Institute Proposal Number (IPN) is not needed, it is likely a Service Request will suffice.

***Proposal in Response - REQUIRED**

- ❑ Choose from the dropdown: Federal Solicitation, Internal, Limited Submission, Non-Federal Solicitation, Others, SBIR Solicitation, STTR Solicitation, Unsolicited, Verbal Request for Proposal



Notice of Opportunity	Description
Federal Solicitation	Federal published announcement
Internal	Institutional program, JHU is the sponsor
Limited Submission	Requires approval from RDT
Non- Federal Solicitation	Foundation, industrial, or any non-federal sponsor
Others	Opportunities that do not fit other categories
SBIR	Small Business Innovation Research
STTR	Small Business Technology Transfer
Unsolicited	Open announcement or no announcement
Verbal Request	Communication from Sponsor

***Activity Type - REQUIRED**

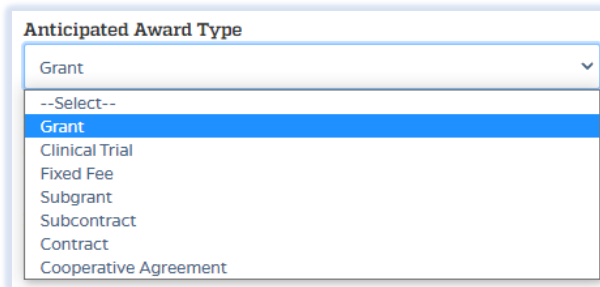
- Select the appropriate entry from the **Activity Type** drop-down list or enter the first characters until the type appears. These are F&A Functions.

Refer to the announcement and Divisional policy to determine the **Activity Type**. Activity Type, also known as the F&A Function is based on Scope of Work. If you are unsure of which activity type to choose, please confer with the Principal Investigator or your Research Administration office for further assistance. The entry in this field determines the F&A rate applied, so selecting the correct value is important.

The Activity Type Chart – [Appendix B](#) describes the different types of activity available from the dropdown menu.

***Anticipated Award Type – REQUIRED**

- Select the **Anticipated Award Type** from the drop-down list.




Check the Funding Opportunity Announcement or confirm with the sponsor to determine.

***Agency/Sponsor — REQUIRED**

The sponsor is the organization providing funds.


- Enter the abbreviation for the sponsor or part of the Sponsor's name and a box will dropdown with choices.
- Click on the appropriate name.
 - If you are unable to find the Sponsor in the dropdown, you must request a New Sponsor by completing a [Service Request](#).
 - If your proposal will be a subgrant/subcontract for another organization's submission, enter the submitting organization as the Sponsor.

***Proposed Start Date — REQUIRED**

- Enter the date the project is expected to start or choose the **Calendar** icon  and click on the date.

To advance the calendar to a different year, click on the **Month Name** and a new window will open with choices. Refer to the sponsor's announcement or guidelines for acceptable dates.

***Proposed End Date — REQUIRED**

- Enter the date the project is expected to end or choose the **Calendar icon**  and click on the date. Refer to the sponsor's announcement or guidelines for acceptable dates.

Duration – automatically populates

No action is required. This field automatically calculates the duration of the research based on Start and End Dates entered.

Prime Sponsor

This field is **required** if your proposal will be a *subgrant/subcontract* for another organization's submission.

- Enter the agency providing funds to the sponsor provided in the Agency/Sponsor field.

If your institutional proposal is not a subgrant/contract, leave this field blank.


If the sponsor you need is not available from the dropdown menu, you must request that a new sponsor be added to SAP by completing a [Service Request](#).

Sponsor Proposal No.

Required if the **Proposal Type** is *Renewal* or *Continuation*. Sponsors often assign numbers to identify proposals in their own systems.

Search the Award module or Institute Proposal module, as appropriate, to find this number.

Sponsor Deadline Date

- Enter the date the proposal is due to the sponsor or choose the **Calendar** icon  and click on the date.

The Deadline Date should be the date it is due to the sponsor unless the date falls on a weekend or holiday.

- Published Grant Deadlines occasionally fall on weekends or JHU holidays, but should be entered in Fibi as a JHU business day.
 - If the deadline falls on a weekend or holiday, be sure to use the prior business day unless the sponsor allows additional time. Always confirm with the funding opportunity announcement or sponsor's guidelines before choosing a deadline.
- If the deadline includes a time earlier than 5pm, you should contact your Grants Associate to let them know.
- Include any special submission guideline/instructions in COMMENTS – go to the Comments Tab.
- If this record is for an incoming subgrant/contract, please use the date the sponsor requires the documents signed by the AOR (Authorized Organization Representative) and returned.
- If there is no published deadline, the date listed should be at least 3 business days from when the Research Administration Office receives the proposal for grants. Please refer to your Research Administration Office website for more information.

Internal Deadline Date - automatically populates

This is automatically calculated based on the Sponsor's Deadline Date entered.

Funding Opportunity Number

This number is needed in the case of federally sponsored awards and can be found on the Funding Opportunity Announcement.

Examples include:

NIH Opportunity → PA-22-063

NSF Opportunity → NSF 21-111

CFDA No.


Catalog of Federal Domestic Assistance (CFDA) number assigned by sponsor for funding opportunity. A CFDA number is a five-digit number assigned in the awarding document to most grants and cooperative agreements funded by the Federal government.

Keywords of Research

Please provide a maximum of 6 keywords (no more than 80 characters each). Use the Proposal Search to find proposals all containing the same Keyword(s).

Abstract

Please provide a succinct and accurate description of the proposal in no more than 500 words. The abstract should include: academic significance of the research, hypotheses or research questions to be addressed, approach and feasibility of the study.

- Click on the **PROCEED**  button and a Proposal Record will be created. Fibi will assign an Identification Number to the record and the Status will continue to show **In Progress**.

Once the Proposal has been started (the user must click on Proceed) the following information will populate at the top of the screen and more tabs will display:

PD#169888 : Best Practices in Training Personnel on Research Administration Systems

Period : 04/12/2023 - 04/11/2024 PI : Schultz, Ronald Lead Unit : 10100801 - OFFICE OF RESEARCH INFORMATION SYSTEMS

Proposal **General** Other Information Budget Questionnaire Attachments Comments Permissions Review ORIS Support

Certification

PD# or Proposal# — Fibi assigns a number when the proposal is created, once you enter the initial required information and click on **Proceed**.

- Take note of this number for easy reference. This information will appear at the top of the screen in bold, blue text.

Lead Unit — This is a read-only field fed by Fibi using the PI's home unit.

- Verify that it is the correct unit for the PI and this proposal. You can only change the lead unit to cost centers for which you have access to submit proposals.

To change the **Lead Unit** denoted by the blue house icon 🏠:

- ❑ Click on the **edit** icon ✎ next to the Principal Investigator (PI).

Name	Role	Department(s) / Organization(s)	Designation	% of Effort	Training	Certification	Actions
Bader, Joel S	Principal Investigator	INSTITUTE FOR COMPUTATIONAL MEDICINE # AAP/Biotechnology	Professor	100	Not Applicable	Incomplete	

- ❑ Enter the desired unit in the **Department** field for the PI.

Employee Non-Employee

Bader, Joel S

Multi-PI Role: Principal Investigator

Department: % of Effort: 100

Click on the icon to mark department as Lead Unit

INSTITUTE FOR COMPUTATIONAL MEDICINE # AAP/Biotechnology

- ❑ Click on the grey house icon 🏠 to change it to blue. The blue house icon 🏠 denotes the Lead Unit. The user cannot change the Lead Unit to a Department unless the user has access to said department.
- ❑ Click on the **Update Key Personnel** button .

Status — This field is determined by the user’s actions. The status of the Proposal Record will show in the upper right-hand corner of the Proposal Record.

PD#169031 : Best Practices in Learning new Research Administration Applications

Period : 08/23/2022 - 08/22/2023 PI : Gasior, Angel Lead Unit : 10100801 - OFFICE OF RESEARCH INFORMATION SYSTEMS

The possible statuses are:

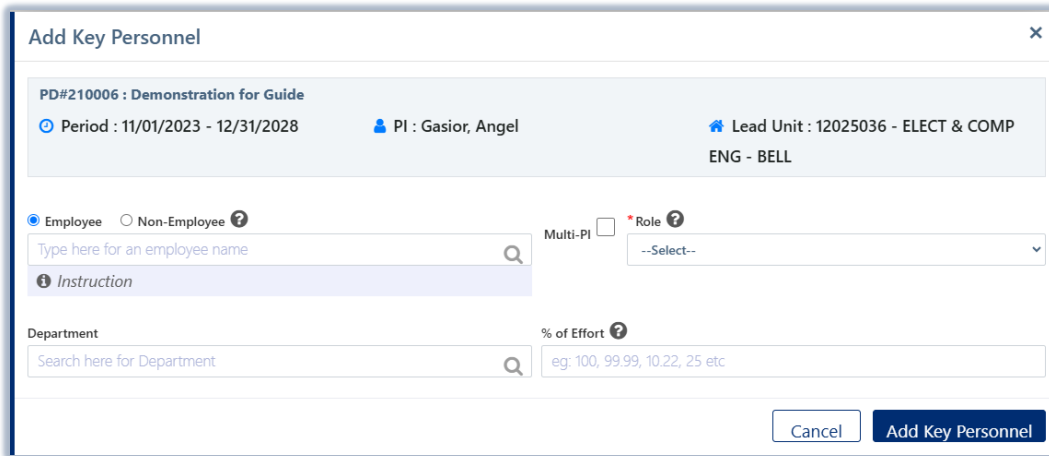
Status	Description
In Progress	Proposal is being worked on; it has not been submitted for approval
Approval in Progress	Submitted for internal approval
Recalled	Recalled from approval by the creator
Rejected	Rejected by an Approver
Submitted	Approved by Institutional Approvers

Continue entering information in the fields that have now opened as appropriate:

- ❑ Continue to scroll down on the **General Information** page to the **Key Personnel** section.

Key Personnel

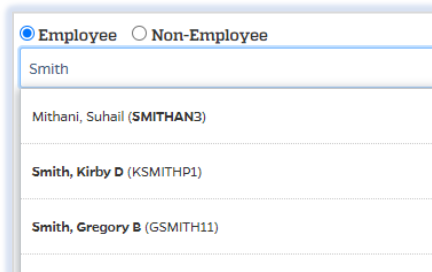
- ❑ Click on **Add Key Personnel** and the following pop-up will open:



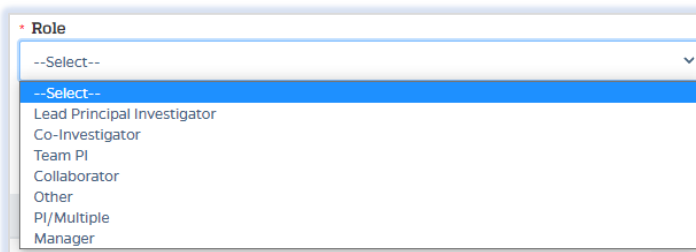
- ❑ Click on **EMPLOYEE** or **NON-EMPLOYEE** as appropriate. Employees are JHU Faculty and Staff. Non-Employees are personnel from other organizations.



- ❑ Enter all or part of the persons last name or JHEDID. The flexible search will show names which contain your search terms in the JHEDID and Last Name. Names will begin to appear in the dropdown menu. Choose the appropriate name. See example below:



- ❑ Click on **--SELECT--** in the Role field and choose the appropriate title from the dropdown menu. If you choose **Key Study Personnel**, the **Project Role** field will open and a description or title can be typed into the text field.




- ❑ Input additional **Department(s)** if needed. Occasionally, faculty have a dual assignment.

- ❑ The **Department** can also be deleted by clicking on the **red X** next to the name.

- ❑ Input the % of Effort.

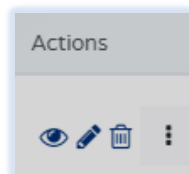
- ❑ Click on **Add Key Personnel** 

Name	Role	Department(s) / Organization(s)	Designation	% of Effort	Training	Certification	Actions
Guider, Tracey	Lead Principal Investigator	TRANSITION GUIDES	No designation specified	100	Incomplete	Incomplete	
Gasior, Angela	Co-Investigator	RESEARCH PROJECTS ADMINISTRATION	Grants Associate	5	Incomplete	Incomplete	

- ❑ If effort needs to be corrected, click on the **Edit**  icon under the **Actions** column and change.

- ❑ Click on **Update Key Personnel**  to save the data.

Actions column explained:



View more details about the personnel

- ❑ Click on the view icon, to see personnel details.



Edit role, effort, or Department assignment

If role, effort, or department assignment needs to be corrected:

- ❑ Click on the **Edit** icon under the **Actions** column and make changes.

- ❑ Click on **Update Key Personnel** to save the changes.



Delete Personnel

- ❑ Click on the **Delete** icon to remove personnel from the record.

Organization

All outgoing subaward organizations must be listed in this section. Special performance site locations can also be entered here.

The screenshot shows the 'Organization' form with four numbered arrows pointing to specific fields: 1 points to the Organization Type dropdown, 2 points to the Organization Name search field, 3 points to the Location search field, and 4 points to the Congressional District search field. Below the form is a table with columns: Organization Type, Organization Name, Point of Contact, Location, Congressional District, and Actions. The table contains two rows of data.

Organization Type	Organization Name	Point of Contact	Location	Congressional District	Actions
Proposal Organization	Johns Hopkins University	McKeown, Alexandra	N/A		
Performing Organization	Johns Hopkins University	McKeown, Alexandra	N/A		

1. The **Organization Types** are **JHU Performance Site** or **Outgoing Subaward**. Choose appropriately.
2. Click on the **Organization Name** field. This is an elastic search so any part of the Organization Name can be used to find an organization.
3. Location – If a more specific place within the organization needs to be named such as a lab, the **Location** field can be used. It is an optional field.
4. Congressional District – Below is a guide for entering the Congressional District:

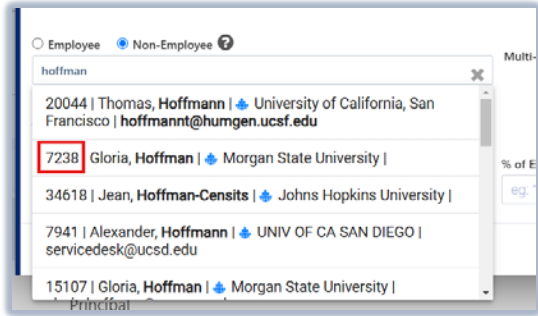
MD-007	for district benefit
MD-All	for statewide benefit
US-All	for nationwide benefit
00-000	for international benefit

If an organization is not listed in the dropdown to choose, you can add to the Rolodex/Address Book by clicking on the **+Add to Address Book** link located below the **Organization Name** field. Enter as much information in the box that opens.

Tip: Enter “Created by: your name” in the comment field to assist in locating the Organization in the future. Use your name in the elastic search to pull up organizations you created.

Tip: To find the organization associated with particular personnel, use the number of the record seen when adding the Non-Employee Key personnel.

In the example below, the number “7238” can be used for Gloria Hoffman from Morgan State.



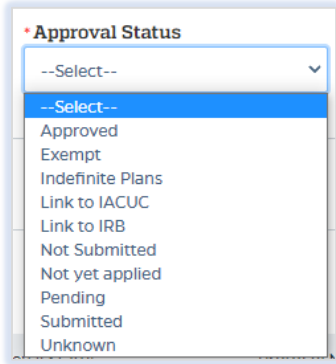
- Go to the **Add Organization** field and enter “7238” and Gloria Hoffman from Morgan State will display.

Special Review

1. Click on **Add Special Review** and the following pop-up window will open:

2. Click on the down arrow (**v**) next to **--Select--** in the **Type** field and choose the type of review from the dropdown menu that applies. If none apply, skip this step.

3. Click on the down arrow (v) next to **--Select--** in the **Approval Status field** and choose the status from the dropdown menu that applies.



4. Complete other fields as appropriate. **Protocol Number, Application Date, Approval Date, Expiration and Comments** should be entered if applicable and the information is available. A Protocol Number is required if the status is approved.
5. Click on **Add Special Review**.
6. Repeat steps 1-5 as many times as needed for other types of reviews.

Areas of Research/Social Challenge Area

Science Codes previously found in the Questionnaires are now be located as a dropdown option in the Area of Research. This is a required field.

- Click on **Add Area** and the following pop-up window will display:

A screenshot of a pop-up window titled "Add Area of Research/Societal Challenge Area". The window contains the following information:

- PD#210006 : Demonstration for Guide
- Period : 11/01/2023 - 12/31/2028
- PI : Gasior, Angel
- Lead Unit : 12025036 - ELECT & COMP ENG - BELL
- Type: A dropdown menu with "Area of Research" selected.
- *Area: A text input field with the placeholder "Type here for Area" and a search icon.
- Sub-Area: A text input field with the placeholder "Type here for Sub-Area" and a search icon.
- Buttons: "Cancel" and "Add Area".

- Click on **Area** and choose each label that applies one at a time from the dropdown menu. Click on **Add Area** to save. At least one **Area of Research/Societal Challenge Area** must be chosen. If none apply, **NONE** is also an option.

Multiple Areas can be added by repeating the steps above.

Tabs in the Proposal Record

Once all of the fields have been entered on the **General Page**, click on the tabs that have opened and enter more information. Tabs include: **Proposal, Other Information, Budget, Questionnaire, Attachments, Comments, Permissions, Tasks, ORIS Support, Certification, and Route Log** - upon completion and submission of the record for approval.

Proposal

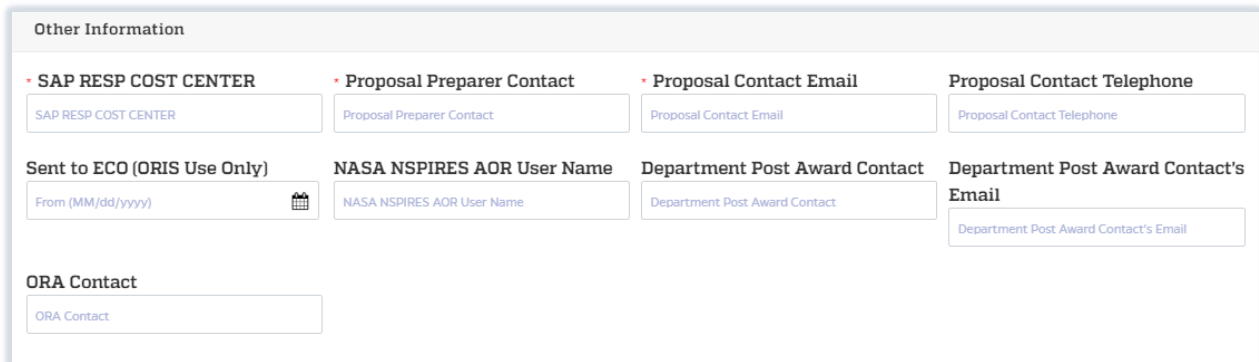
No further information needs to be added on this tab. **This is view only information.** All of the information in the proposal record is displayed here for easy review.


Click on the other tabs to edit the information that is displayed on this page.

Other Information

1. Click on the **Other Information tab**  at the top of the screen.

This tab is used to identify the contact person who can assist the Research Administration Office with questions about the proposal.



Other Information			
* SAP RESP COST CENTER	* Proposal Preparer Contact	* Proposal Contact Email	Proposal Contact Telephone
SAP RESP COST CENTER	Proposal Preparer Contact	Proposal Contact Email	Proposal Contact Telephone
Sent to ECO (ORIS Use Only)	NASA NSPIRES AOR User Name	Department Post Award Contact	Department Post Award Contact's Email
From (MM/dd/yyyy) 	NASA NSPIRES AOR User Name	Department Post Award Contact	Department Post Award Contact's Email
ORA Contact			
ORA Contact			

2. Complete all applicable fields. Fields denoted with a red asterisk * are required.

SAP Responsible Cost Center*

- Enter the 10-digit Responsible Cost Center for funding. The first 8-digits must match the lead unit chosen on the General page.

Proposal Preparer Contact*

- Input your full name here.

Proposal Contact Email*

- Input your email address here.

Proposal Contact Telephone

- Input your phone number where you can be contacted during business hours here.

Department Post Award Contact

- Once the proposal is awarded, this is the contact for the individual who manages post award actions at the Department level.

Department Post Award Contact's Email


- Enter the email of the Department or individual named as the Department Post Award Contact.

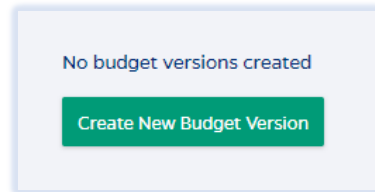
ORA Contact – will automatically populate

- No action required. (This field can be manually overwritten if the information is incorrect.)

3. Click on **SAVE** button.

Budget

- Click on the **Budget** tab  at the top of the screen.
- Click on the **Create New Budget Version** button.



The budget window will open:

PD#210006 : Demonstration for Guide

Period : 11/01/2023 - 12/31/2028 PI : Gasior, Angel Lead Unit : 12025036 - ELECT & COMP ENG - BELL

Proposal General Other Information **Budget** Questionnaire Attachments Comments Permissions Tasks ORIS Support Certification History

Budget Overview Last Updated By Gasior, Angel on 12/16/2024 3:32:11 PM

Overhead Rate Type: MTDC Budget Status: In Progress Direct Cost: \$0.00 Indirect Cost: \$0.00 Total Cost: \$0.00 Cost Sharing: --Select--

On-Campus Rate: Enter On-Campus Rate Off-Campus Rate: Enter Off-Campus Rate

Description: 1 (3000 characters remaining)

Budget Summary [+ Add Period](#)

Period	Start Date	End Date	Direct Cost	Indirect Cost	Total Cost	Actions
2023 (Nov 01 2023 - Aug 31 2024)	11/01/2023	08/31/2024	\$0.00	\$0.00	\$0.00	
2024 (Nov 01 2024 - Oct 31 2025)	11/01/2024	10/31/2025	\$0.00	\$0.00	\$0.00	

- ❑ Choose the correct **Over Head Rate Type** from the dropdown.

Over Head Rate Type

MTDC

MTDC

None

S&W

TDC

Abbreviations explained:

MTDC = Modified Total Direct Costs

None = None

S&W = Salary and Wages

TDC = Total Direct Costs

- ❑ Choose the appropriate description from the **Cost Sharing** dropdown menu.

Cost Sharing

--Select--

--Select--

None

Prohibited

Required by Sponsor

Voluntary

Cost Sharing Type	Description
None	No cost sharing
Prohibited	The sponsor does not permit cost sharing.
Required by Sponsor	The Sponsor requires cost sharing and an attachment from the sponsor explaining the cost sharing details is required.
Voluntary	The PI has decided to cost share and has Department Business Office approval. An approval attachment must be uploaded on the Attachment tab.

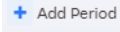
- ❑ Enter your **Direct Costs** and **Indirect Costs** for each year of the project.
- ❑ Change the **Budget Status** to **Complete** when appropriate, choose **Complete** from the dropdown menu. The budget must be marked complete before the proposal can be submitted.

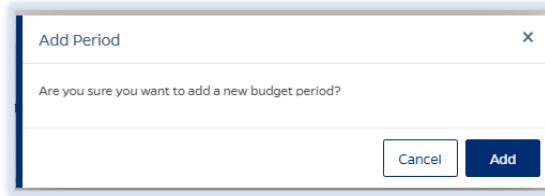
Budget Status

Complete


- ❑ Click on the **SAVE** button.

To add a budget period:


- Click on **Add Period** on the right side of the screen. 
- Click on the **Add** button.

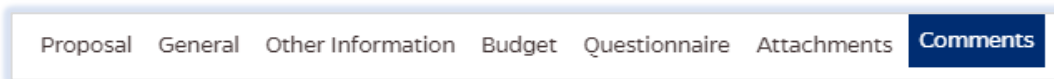


To delete a budget period:

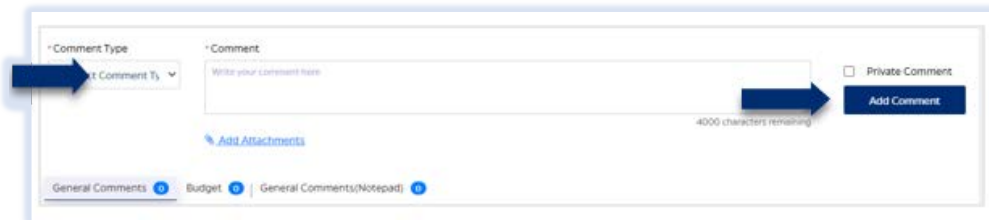
- Click on the **Delete** icon next to the chosen budget period. 

NOTE: The budget dates must match the start and end dates entered on the **General** tab.


- Click on the **Calculate & Save** button  in the bottom right corner.
- If comments are needed regarding the budget, click on the **Comments** tab in the menu bar.



- Choose **Budget** from the **Comment Type** dropdown list. Click on **Add** when satisfied with the comments entered.



To Print the Budget Summary:

1. Click on the **More Actions** icon  in the upper right corner.
2. Choose **Print Budget** for the dropdown list. The **Print Budget** option will not be available until the budget information has been entered.

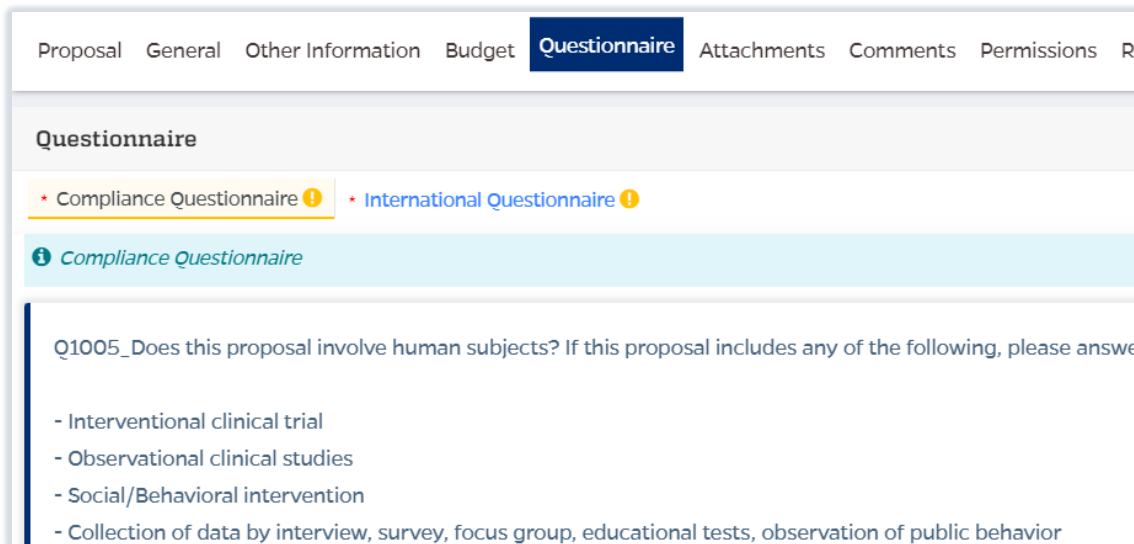
Questionnaire

Questionnaires must be completed by the PI in order to submit a proposal or service request for approval in Fibi. Department personnel can input the answers in Fibi for the PI if a document signed by the PI matching all the answered questions is also uploaded as an attachment. If the PI completes the Questionnaires in Fibi, the signed attachment is not needed as Fibi notes the user who completes the Questionnaire in the system.

Users can access the Questionnaires once a Proposal Development record/Service Request has been started and the status is *In Progress*.

To complete Questionnaires:

- Click on the **Questionnaires** tab in the menu at the top of the screen.

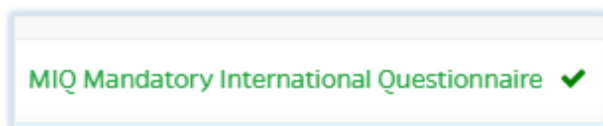


Once the Questionnaire tab is chosen, one or more tabs will show with Questionnaires that must be completed in order to submit the Proposal Development Record. Questionnaires will display with a yellow exclamation mark if they are not completed.

The tab displays in black font and a yellow background to indicate the Questionnaire being answered.

- Choose the appropriate answers for each questionnaire. The PI must provide this information or complete the Questionnaire in Fibi.
- Click on the **Save** button.

Once all the questions have been completed in the Questionnaire, the tab will display with green writing and a green checkmark and Last Updated by (Name) will show in the upper right corner.



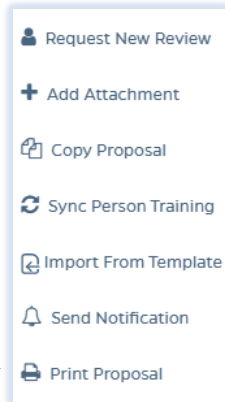
All Questionnaires must be completed before a Proposal Development record can be routed for approval.

To print the blank questionnaires and certifications for signing:

- ❑ Click on **More actions** icon (elipsis) and choose **Print Proposal** from the dropdown menu.



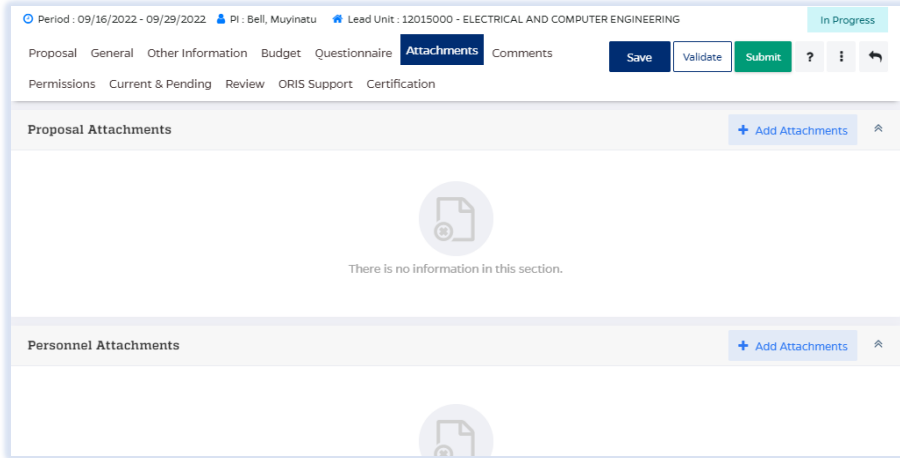
- ❑ Then choose Print Proposal from the dropdown menu



- ❑ Then choose one of the following from the dropdown menu:
 - **Fillable PI Questionnaire Certification** (includes the certification and questionnaires for the PI to complete)
 - **Fillable JHU Personnel Certification** (includes the certification questions only for JHU Key Personnel)

Attachments

- ❑ Open a proposal by clicking on the **Proposal** tab.
- ❑ Click on the **Attachments** tab **Attachments** at the top of the screen.

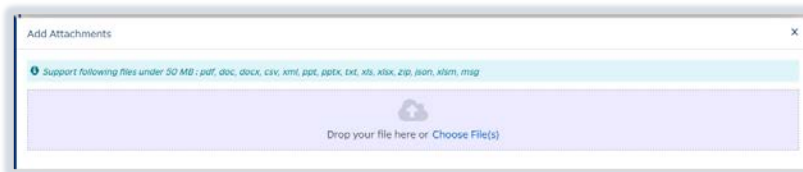


For General Proposal Attachments:

- ❑ Click on the **+ Add Attachments** button.



- ❑ The box below will open.
 - Click and drag your documents into this box. You can click and drag a box around multiple attachments at one time and drop them all into the box at once.



— or —

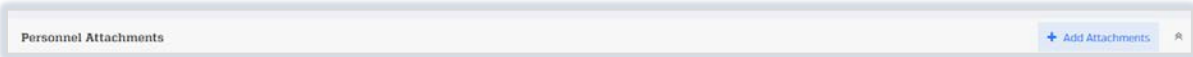
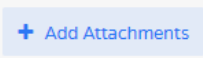
- Click on **Choose File(s)** and click on each document to upload. Then click **Open**. The user can highlight multiple files in the list that opens to upload multiple files at once, by holding the **Ctrl** button and clicking on each document.
- ❑ Choose the appropriate **Attachment Type** from the dropdown for each document uploaded. Attachment types marked as *Confidential* can not be seen by PIs and Key Personnel.
- ❑ Enter a Description in the **Description field**. (Optional)



- Change the **Status field** from *Draft* to *Final* as appropriate using the dropdown menu.
- Click on the **Add** button.

For **Personnel Attachments**:

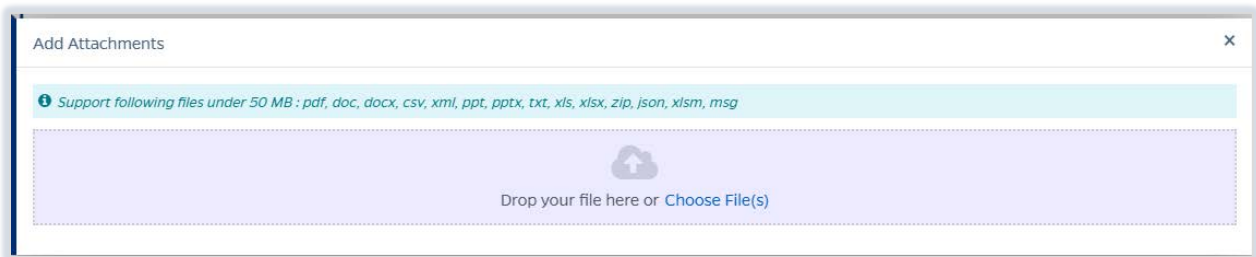
- Click on **+ Add Attachments**.



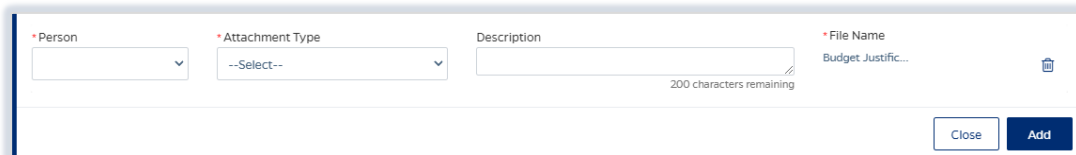
- The box below will open.
 - Click and drag your documents into this box. You can click on multiple attachments at one time and drop them all into the box at once.

— or —

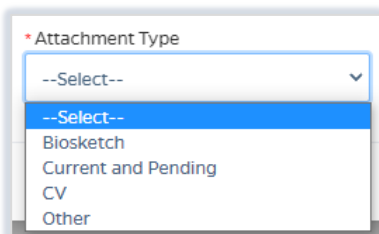
- Click on **Choose File(s)** and click on each document to upload. Then click **open**.



- Choose the appropriate **Person** from the dropdown menu for the document.








- Choose the appropriate **Attachment Type** from the dropdown for each document uploaded.



- Enter a Description in the **Description field**. (Optional)
- Change the **Status field** from *Draft* to *Final* as appropriate using the dropdown menu.
- Click on **Add** button.

Once documents have been attached, they can be deleted and replaced. The user can also edit the Attachment type and Description for each document. The chart below describes the icons and actions for each icon.

Other Actions once attachments have been added:

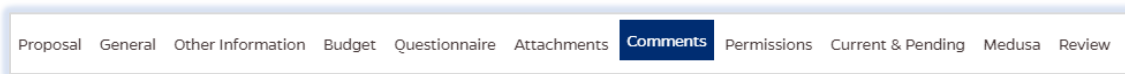
	Edit the details.
	Delete the document.
	Download the document.
	Replace will insert a new version of the document chosen.
	The version icon will allow the user to see previous versions of the document one it has been replaced.

Comments

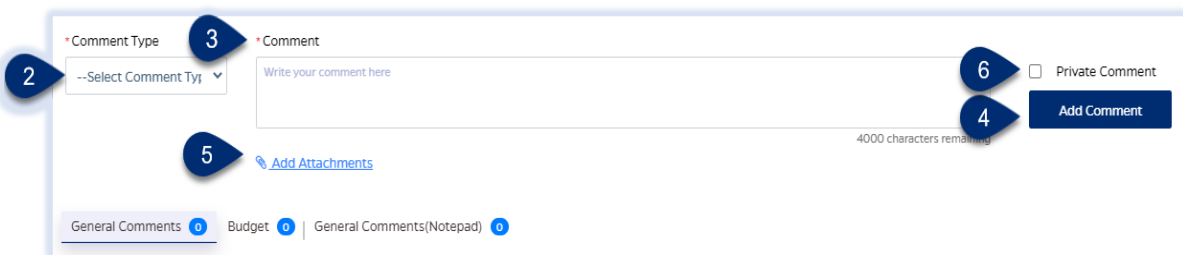
Comment tabs can be found in all types of records including Proposals (PD), Institute Proposals (IP), Awards, and Service Requests. Comments can be added to records at any time, including once a PD has been approved/submitted.

For adding Comments in Proposals, IPs, and Service Request complete the following steps:

1. Click on the **Comments** tab.



2. Choose the appropriate **Comment Type** from the dropdown menu.
3. Enter the Comments into the **Comments** box.
4. Click on **Add Comments** button.
5. The user can add attachments as well to this page to further explain comments written by clicking on the **Add Attachments** link.
6. Comments can be marked private so that only the user and the Research Administration Office can see the comments by clicking on the **Private Comments** box.



A screenshot of the comment form interface. It features a dropdown menu for 'Comment Type' (callout 2), a text input field for 'Comment' (callout 3) with a '4000 characters remaining' indicator, an 'Add Attachments' link (callout 5), a 'Private Comment' checkbox (callout 6), and an 'Add Comment' button (callout 4). At the bottom, there are tabs for 'General Comments', 'Budget', and 'General Comments(Notepad)'.

Comments can be edited and deleted if the user created the Comment.

Click on the Edit icon  or the Delete icon  as appropriate.

Permissions

At times, the need will arise to grant other people roles on a proposal during its creation.

From the Permission Tab:

To Add a User:

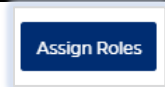
- ❑ Enter the person to be added in the **Person** field. You can enter the individual's last name or the JHEDID and a dropdown of choices will populate. Click on the name in the dropdown.

- ❑ Then choose the desired role from the dropdown in the **Roles** dropdown menu.


Roles and function include:


Proposal Aggregator	Edit and submit a proposal for approval
Proposal Budget Creator Role	Edit the budget
View Proposal	The ability to view

- ❑ Click on the **Assign Roles** button.



To delete a user:

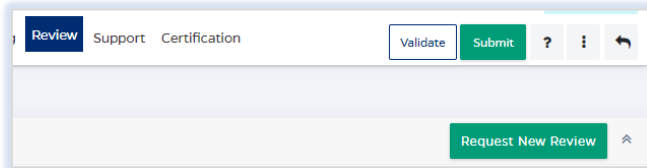
Click on the delete icon  next to the individual that should be deleted.

PI Role			
User ID	Full Name	Home Unit	Action
AGASIOR1	Gasior, Angel	10100801 - OFFICE OF RESEARCH INFORMATION SYSTEMS	

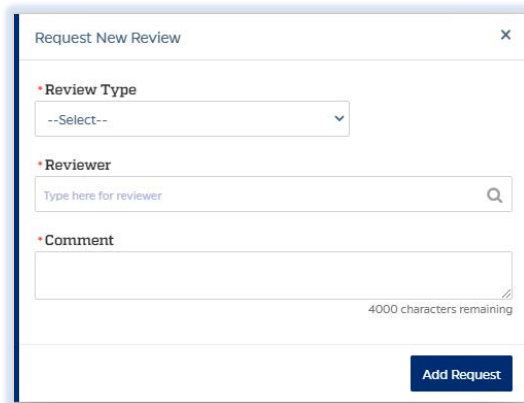
Tasks (pre-review)

Departments can request pre-reviews from JHU personnel, such as PIs, supervisors or colleagues they specify. This process can be used before submitting to the Research Administration Office for official approval.

- ❑ Click on the **Tasks** tab and click on **Request New Review** button.

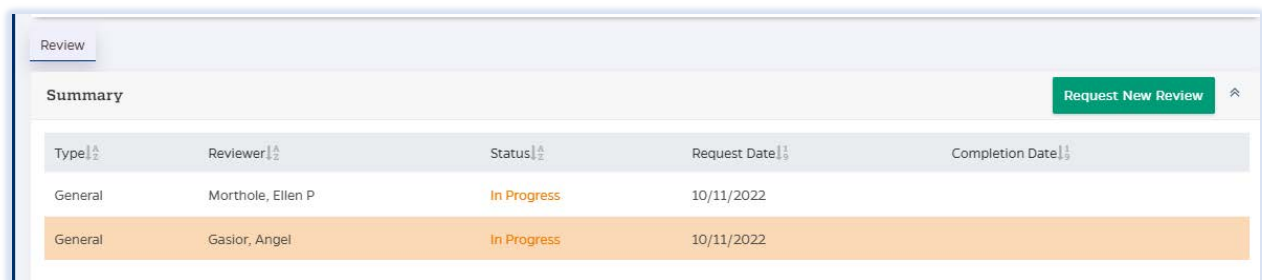


- ❑ Choose the appropriate **Review Type** from the dropdown menu.

A screenshot of a 'Request New Review' form. It has a title bar with a close button. The form contains three main sections: 'Review Type' with a dropdown menu showing '--Select--'; 'Reviewer' with a search input field containing the placeholder text 'Type here for reviewer' and a magnifying glass icon; and 'Comment' with a text area and a character count '4000 characters remaining'. At the bottom right, there is a blue button labeled 'Add Request'.

- ❑ Enter the **Reviewer** you wish to review your question(s). Enter the individual's last name and a dropdown will begin to populate.
- ❑ Enter your question(s) in the **Comment** box.
- ❑ Click on **Add Request** button.

The user will see the request in the PD record:

A screenshot of a 'Review' tab interface showing a 'Summary' section. At the top right of the summary section is a green button labeled 'Request New Review' with an upward-pointing arrow. Below this is a table with the following columns: 'Type', 'Reviewer', 'Status', 'Request Date', and 'Completion Date'. The table contains two rows of data, both highlighted in orange.

Type	Reviewer	Status	Request Date	Completion Date
General	Morthole, Ellen P	In Progress	10/11/2022	
General	Gasior, Angel	In Progress	10/11/2022	

The Reviewer should receive an email notification and see the request on their Action List. Reviewers can **Write a Review**, **Return to Applicant**, and **Complete Review** all of which require a comment.

Technical Support

Email ORIS

Users can email the ORIS team at oris@jhu.edu for any technical issue they may have using Fibi.

ORIS Support Tab

If a user is in the midst of creating a proposal and is having technical difficulty, the ORIS team can be reached directly through the Proposal Development record.

- ❑ Click on the **ORIS Support** tab at the top of the screen.

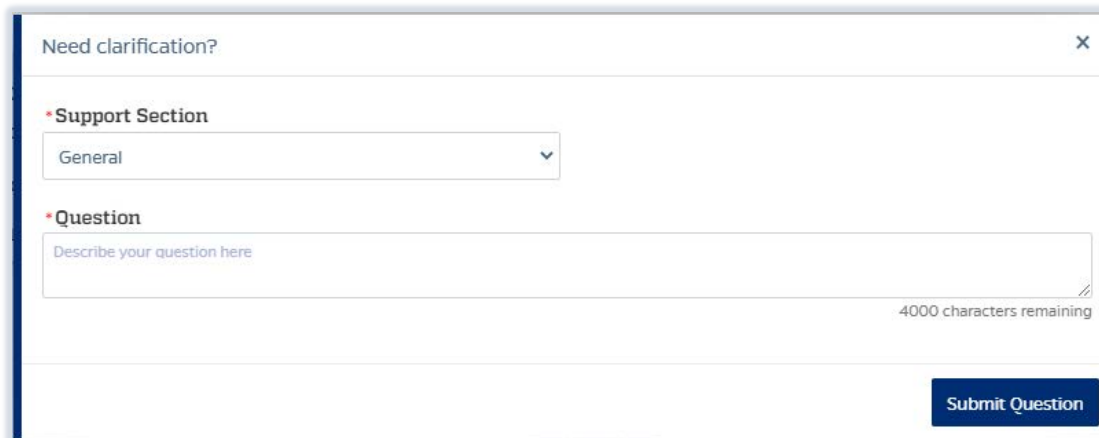


- ❑ Click on the **Request for Support** button in the upper right corner.

Request for Support




The following box will open requesting input:

A screenshot of a 'Need clarification?' form. The form has a title bar 'Need clarification?' and a close button 'x'. It contains a 'Support Section' dropdown menu with 'General' selected. Below it is a 'Question' text area with the placeholder text 'Describe your question here' and a character count '4000 characters remaining'. A 'Submit Question' button is located at the bottom right.

- ❑ Choose the appropriate category from the **Support Section** dropdown and type in your question in the **Question** field.

ORIS will respond and the user will receive a notification email. The response will show in the record on the ORIS Support tab in which the question was initiated.

- ❑ To see the response in Fibi, navigate to another tab in the proposal and then click on the ORIS Support tab again or click on refresh  in the browser.

Certification

Key Personnel can complete their own certifications or the aggregator can complete the certifications by proxy.

- ❑ Click on the **Certification** tab.

The screenshot shows the 'Certification' tab for proposal PD#169647. The top navigation bar includes 'Proposal', 'General', 'Other Information', 'Budget', 'Questionnaire', 'Attachments', 'Comments', 'Permissions', 'Review', 'ORIS Support', and 'Certification'. Below the navigation bar, there are two main sections. On the left, a 'Key Personnel' list shows four individuals: Bell, Muyinatu (Principal Investigator), Poppert, Dylan C (Co-Investigator), Goodman, Colin R (Co-Investigator), and Judy, Thomas. Each name has an edit icon (pencil) and a notification icon (bell). On the right, a 'Questionnaire' section is visible, containing a heading 'Fibi-Proposal Person Certification Questions' and a link to 'Proposal Certifications for Investigators and Key Persons on a project. Version November 11, 2022'.

- ❑ Click on the **edit icon** (blue pencil) next to the Key Personnel's name.

This close-up shows the 'Key Personnel' list with one entry: 'Schultz, Ronald' (Principal Investigator). A blue arrow points from the text to the blue pencil edit icon next to the name.


- ❑ Complete the Certification questions for each individual listed in the **Key Personnel** column on the left side of the screen.
- ❑ Choose **YES** or **NO** for each question according to the answers provided by the Key Personnel or the Key Personnel has access and can complete the certification in Fibi.
- ❑ Click on the **Save** button.

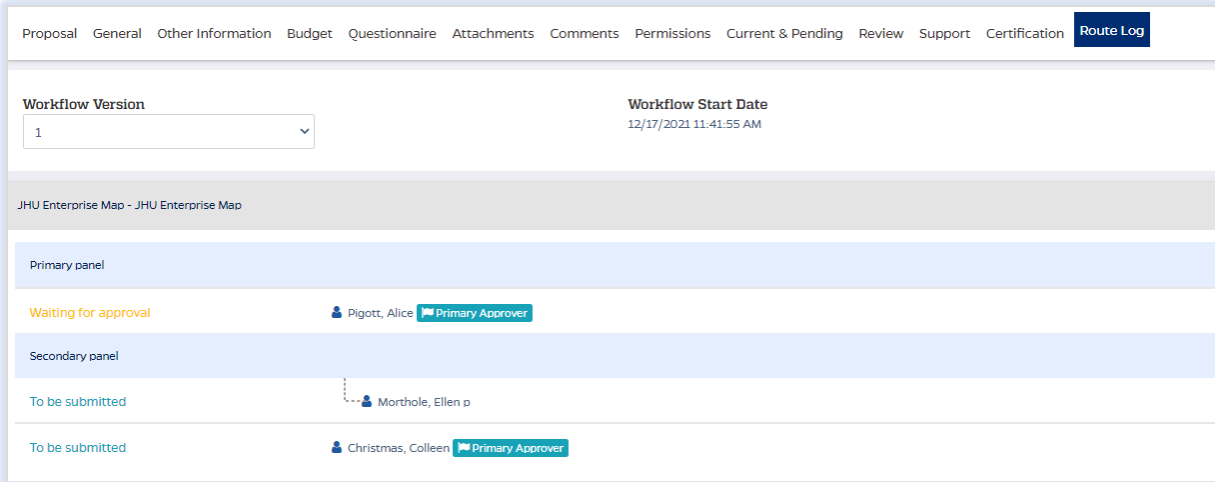
To send a notification to key personnel:

- ❑ Click on the notify icon (bell) next to the individual's name. This will send an email notification to the Key Personnel of choice that includes a link to the page in the record that needs to be completed.

This close-up shows the 'Key Personnel' list with one entry: 'Schultz, Ronald' (Principal Investigator). A blue arrow points from the text to the blue bell notification icon next to the name.

Route Log

The **Route Log tab**  will not display until the Proposal Record is created and submitted for approval.



The screenshot displays the 'Route Log' tab within a software interface. At the top, a navigation bar includes tabs for Proposal, General, Other Information, Budget, Questionnaire, Attachments, Comments, Permissions, Current & Pending, Review, Support, Certification, and the active 'Route Log' tab. Below the navigation bar, the 'Workflow Version' is set to '1' and the 'Workflow Start Date' is '12/17/2021 11:41:55 AM'. A map area is labeled 'JHU Enterprise Map - JHU Enterprise Map'. The main content area is divided into three panels: 'Primary panel' showing 'Waiting for approval' by 'Pigott, Alice' as the 'Primary Approver'; 'Secondary panel' showing 'To be submitted' by 'Morthole, Ellen p'; and a third panel showing 'To be submitted' by 'Christmas, Colleen' as the 'Primary Approver'.

All levels of approval can be viewed here. Each level displays on its own tab. The Workflow Start Date shows when the creator of the record initially submitted the record for approval.

Waiting for Approval means the Proposal is in the approver's queue.

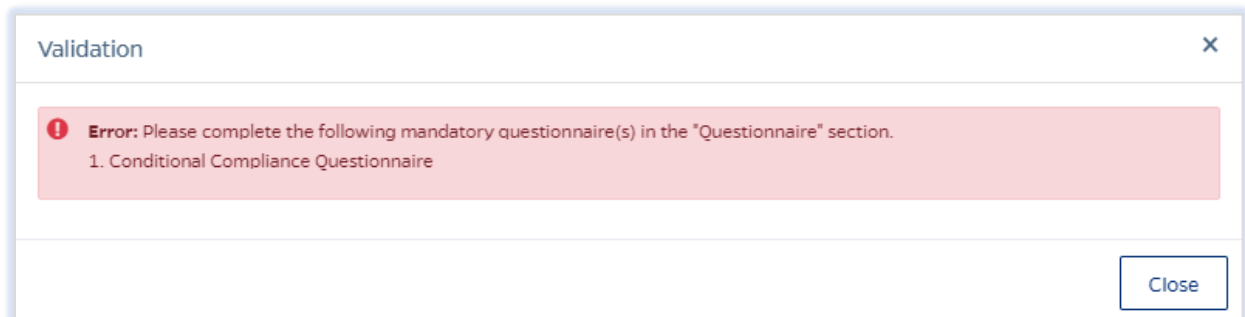
Validate and Submit

Validating a proposal before submission is recommended.

- ❑ Click on **Validate** in the upper right-hand corner of the screen and any errors or warnings will display.

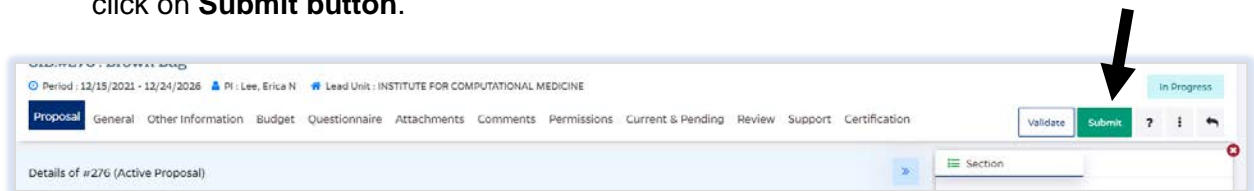


All errors must be corrected before you will be able to submit. Warnings will not prohibit submission, but need to be carefully considered if applicable.

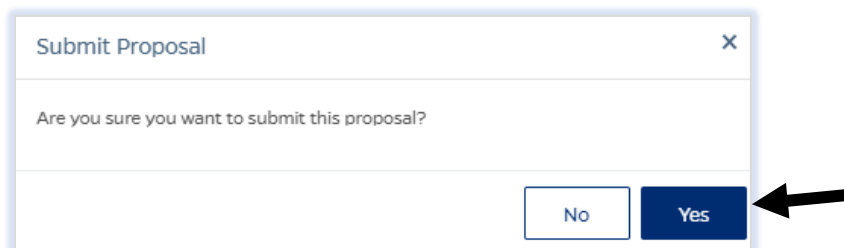


Submitting a proposal will route the proposal for review.

1. When all errors have been corrected and warnings have been appropriately addressed, click on **Submit button**.




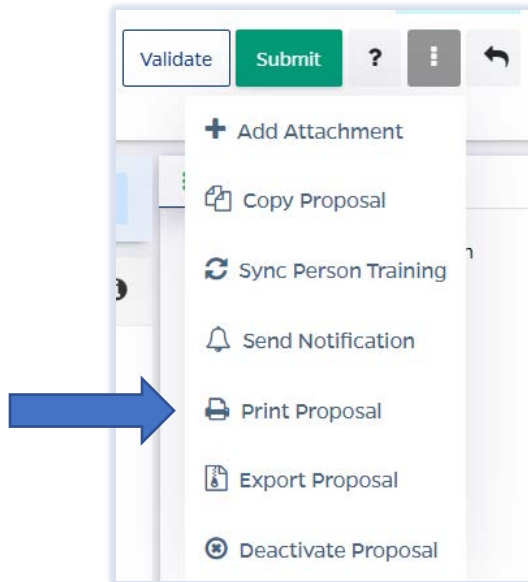
2. Click on **Yes button**, if you are ready to submit the proposal.



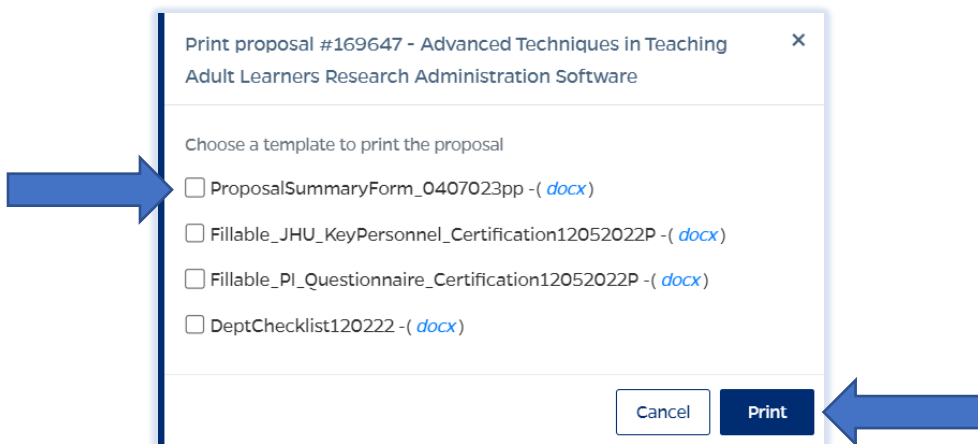
PD Summary

PD Summaries are available for review of information and are also used to assist with workflow from one office to another.

- Click on the **More Actions** Icon (ellipsis)  in the upper right corner.
- The 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.

Proposal ID: 169647

Institute Proposal Number:

KEY PERSONNEL

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 INFORMATION

Sponsor (Application to): 300023 - ADVANCED BIONICS CORPORATION (ABC)

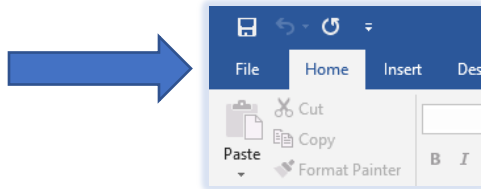
Sponsor Type: Private Profit

Sponsor Deadline:

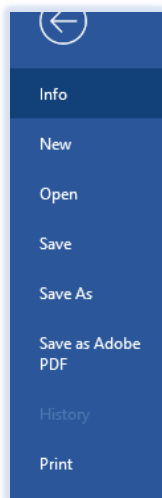
Prime Sponsor (if subaward):

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.




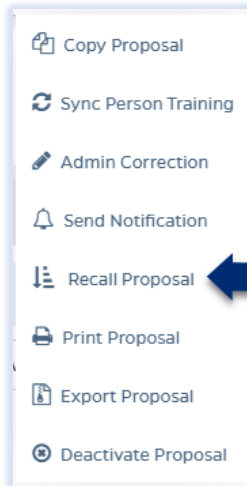
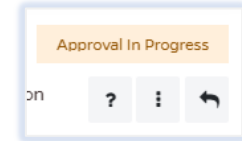
- Click on **Save**, **Save As** or **Print** as needed.



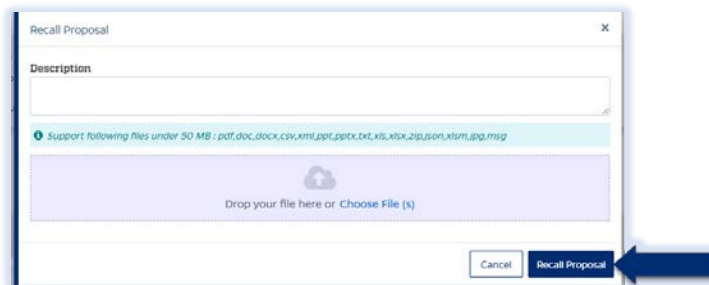
Recall

If you have submitted a proposal record for review and want to make changes to it, you need to recall the proposal. When a Proposal Development record has been routed for approval, it can be recalled for further edits. If the status shows as **Approval in Progress**, complete the following steps:


- ❑ Click on the **More Actions** button  in the upper right corner.
- ❑ Choose **Recall Proposal** from the dropdown menu.

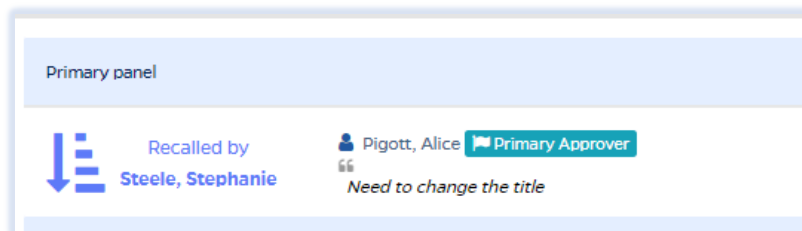


- ❑ Enter the reason the record needs to be recalled and click on the **Recall Proposal** button.



The status will change to **Recalled**, the user can make edits and submit again when ready.

- ❑ Click on the **Route Log** tab  to see who recalled the Proposal Record.



Creating a Service Request

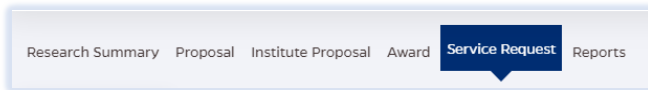
Some proposal types previously in Coeus have been converted to Service Requests in Fibi. Service Requests streamline the effort required for input and review of these actions. Service Requests are linked to Records so only limited information needs to be entered in order to complete requests.

The following items are Service Requests:

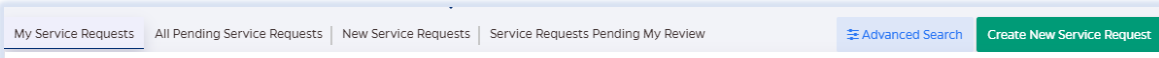
- ❖ Progress Reports/Continuation/Modification to a Grant or Subgrant (previously Continuation)
- ❖ NCE – No Cost Extension (previously Administrative Action)
- ❖ Prior Approvals (previously Administrative Actions)
 - Carryover – Prior Approval
 - PI Change – Prior Approval
 - Foreign Component – Prior Approval
 - Prior Approval – Other (excludes Carryover, PI Change, and Adding Foreign Component)
- ❖ SOM only (previously Negotiation Only)
 - Materials Transfer Agreement (MTA)
 - Unfunded Collaboration
 - Modification to a Funded Contract
 - Modification to an Unfunded Contract
- ❖ New Sponsor Request (previously in Webforms)
- ❖ Pre-award Request (previously in Webforms)

To create a Service Request:

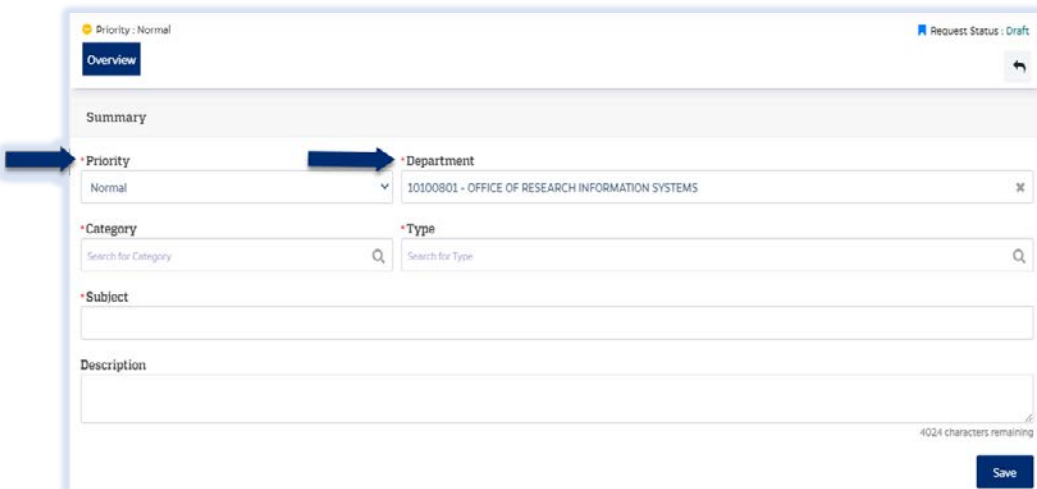
- ❑ From the Landing Page/Dashboard, click on **Service Request** in the top row.



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



The following screen will open:

A screenshot of the 'Create New Service Request' form. The form has a header with 'Priority: Normal' and 'Request Status: Draft'. Below the header is an 'Overview' tab. The main form area is titled 'Summary' and contains 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). A 'Save' button is at the bottom right. A character count '4024 characters remaining' is visible at the bottom right of the description field. 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 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 a **Category** and **Type** from the dropdown menus based on the following charts:

Choose the **Category – Award** for the following types Service Requests; these have the ability to link to an award:

Category: Award Service Request Type:	Previously known in Coeus as
Carryover (Prior Approval)	Administrative Action
Foreign Component (Prior Approval)	Administrative Action
Modification of a Funded Contract	Revision
No Cost Extension (NCE)	Administrative Action
PI Change (Prior Approval)	Administrative Action
Prior Approvals – Other	Administrative Action
Progress Report / Continuation (SOM only) / Modification to a Grant or Subgrant (SOM only)	Continuation

Choose the **Category – Service Request** for the following types of Service Requests:

Category: Service Request Service Request Type:	Previously known in Coeus or Webforms as
Materials Transfer Agreement (MTA) – SOM Only	Negotiation Only
Modification of an Unfunded Contract (SOM only)	Revision
New Sponsor Request	Request a New Sponsor
Unfunded Collaboration (SOM only)	Negotiation Only

Choose the **Category – Institute Proposal** for the following types of Service Requests:

Category: Institute Proposal Service Request Type:	Previously known in Webforms as
Pre-award Request	Request a Pre-award Account

- ❑ For Service Request Types that have a category of Award, 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 the title

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


- ❑ Complete the Subject line in the **Subject** field. Subject fields will vary based on the type of Service Request. The first section of the Subject will be the type of Service Request followed by other identifying information that the user will need to input.

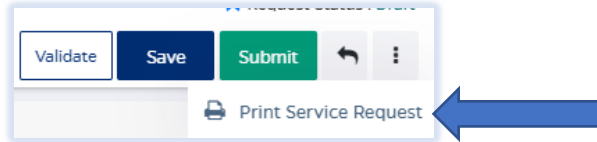
For this example, enter the due date, department, and PI.

- ❑ 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.

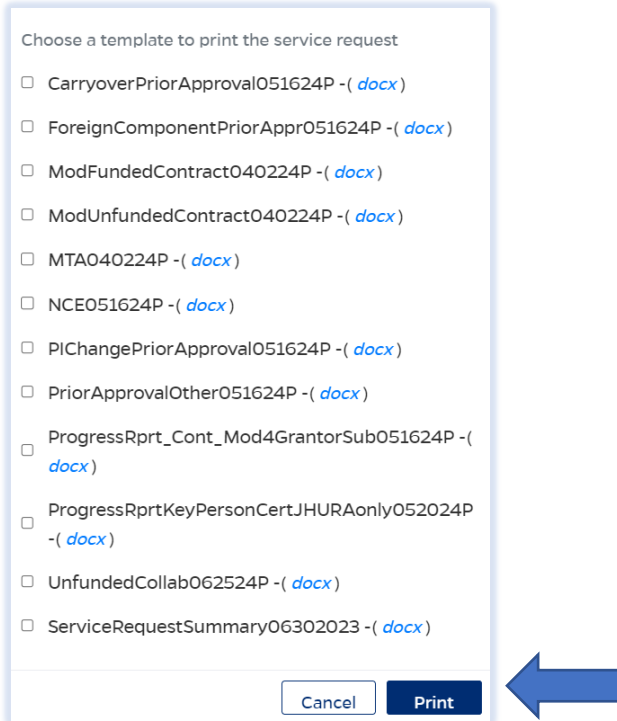
After the questionnaire is complete, the tab will change to **green**.

For Service Request Types which require Questionnaires and/or Certifications,

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



- ❑ Choose the appropriate fillable form from the list in the dropdown and then click on **Print**.

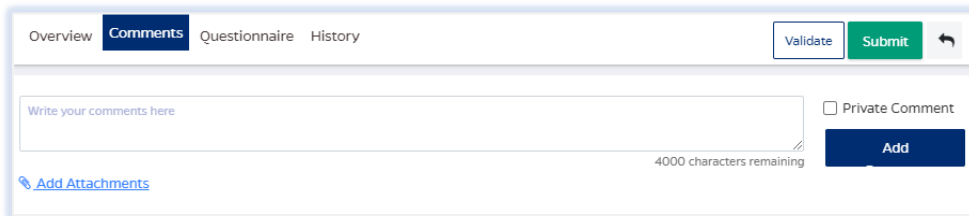


- ❑ Send the fillable form to the PI to be completed and signed.
- ❑ Complete all Questionnaire tabs according to the PIs provided answers.
- ❑ Upload the signed fillable form to the Service Request where the PI Certification is requested.

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, xlsx, xlsx, xlsx, 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.



Service Requests can also be:

- Recalled
- Deactivated
- Copied

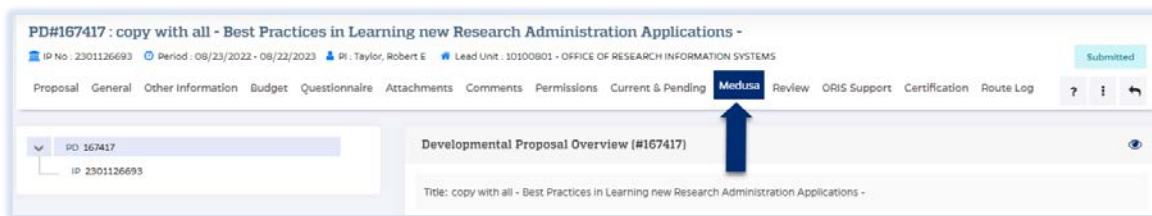
- ❑ Go to the **More Actions** icon to find these options.

Medusa

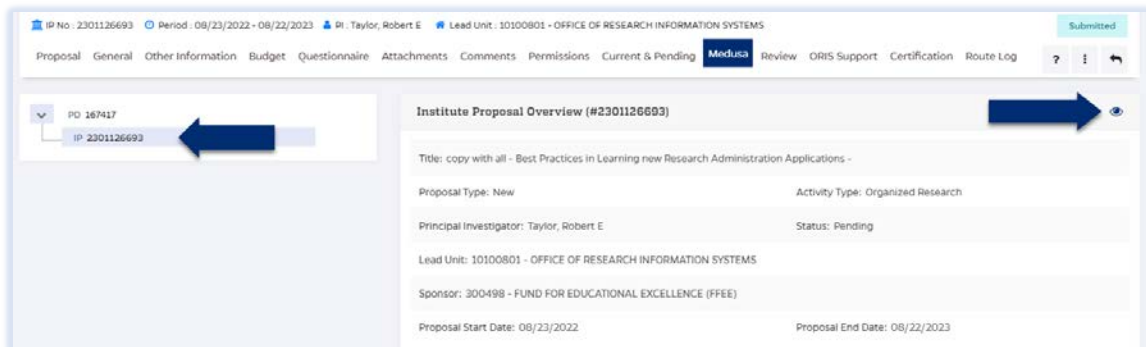
Medusa is the tab that can be used to see all the connections between Proposal, Institute Proposal, and Award numbers. It can be accessed in various modules.

From a PD with a Submitted status:

- ❑ Click on the **Medusa** tab.



- ❑ Click on the **IP#** and then the **View** icon to view the Institute Proposal record.

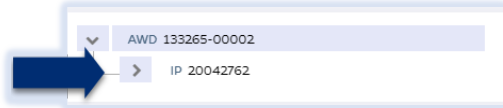


- ❑ To navigate back to the PD, click on the **Development Proposal Number** link.



The process works the same when opening Medusa from the IP and Award module.

Note: Arrows pointing to the right can be clicked to open more linked information.



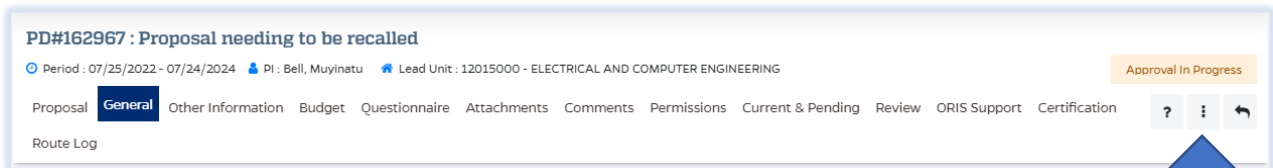
Opens to:



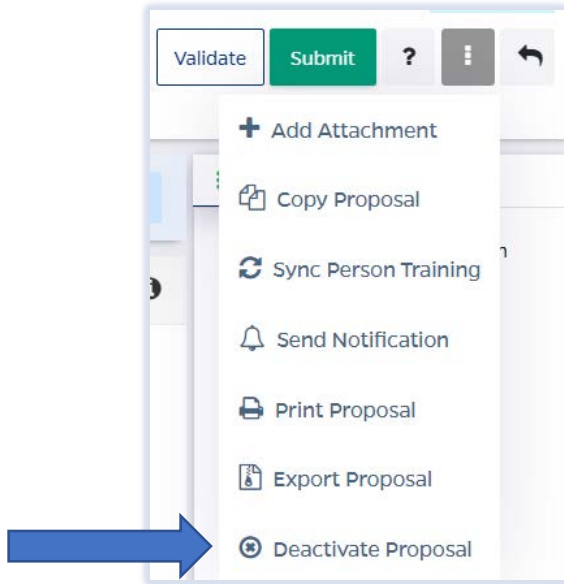
Deactivate a Proposal Development Record

Proposals cannot be deleted, but deactivating the proposal will remove it from the general search. If you keep the number of the PD, you can look it up in the Proposal Search by its PD#.

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



- ❑ Choose **Deactivate Proposal** from the dropdown menu.



The user will receive a notification email that states the PD record has been deactivated.

Appendix A - Proposal Type Chart

Proposal Type	Description
New	Application submitted for funding for the first time. This also includes multiple submission attempts within the same round.
Renewal	Project for which previous years of funding have elapsed. Renewals request additional funding to continue previously awarded projects through either an announced open competition or closed competition with no guarantee of funding. Proposals of this type generally receive a new SAP Grant record.
Supplement	Administrative and Competitive supplements are proposals that request additional funding, equipment, time, etc. to expand the scope of work for a current award. NIH calls this a "Revision." Applicants should contact the awarding agency for advice on submitting applications that request additional funding. Area of Research - Administrative Supplement or Competitive Supplement is required.
Resubmission	The second or third attempt at getting a project funded. The first attempt was submitted as "NEW." All subsequent attempts are resubmissions of the same application perhaps addressing concerns raised by a sponsor during their review.
Task Order	Proposal requesting funds for work or services conducted under an existing Master Agreement (a type of contract that does not procure or specify a firm quantity of services except through the issuance of individual Task Orders).
Master Agreement	Starting a new Master Agreement contract. This proposal contains no budget amounts; its purpose is to request Research Administration to create an Institute Proposal record for entire MA, under which future Task Orders will be created & linked.

Appendix B - Activity Type Chart

Activity Type	Description
Organized Research	<p>Research activities include rigorous inquiry, experimentation or investigation to increase scholarly understanding in the involved discipline. Examples include awards:</p> <ul style="list-style-type: none"> • to support research activities • to maintain facilities, equipment and/or operation of a facility that will be used for research • for the writing of books, when the purpose is to publish research results • for data collection, evaluation, analysis and/or reporting
Instruction	<p>Instruction activities include any project where the purpose is to instruct any student at any location. Recipients of instruction may be JHU students or staff, teachers or students in elementary or secondary schools, or the general public. Examples include:</p> <ul style="list-style-type: none"> • Curriculum development projects, including projects which involve evaluation of curriculum or teaching methods. Note that such evaluation may be considered “research” when the preponderance of activity is data collection, evaluation and reporting • Projects involving JHU students in community service activities for which they are receiving academic credit • Activities funded by awards to departments or schools for the support of students • Fellowship support for pre-doctoral and post-doctoral training activities, including grants funding dissertation work and related travel • Support for writing textbooks or reference books, or creating video or software to be used as instructional materials
Other Sponsored Activity	<p>Other sponsored activities include programs involving work other than instruction and organized research. Most projects in this category do not directly involve students and gain little benefit from libraries, therefore the F&A rate applicable to this category is less than for Research or Instruction.</p> <p>Examples of Other Sponsored Activities include:</p> <p>Travel grants, Support for conferences, seminars or workshops, Support for University public events, Publications by JHU Press, Support for student participation in community service projects which do not result in academic credit, Support for projects pertaining to library collections, acquisitions, bibliographies or cataloging, Programs to enhance institutional resources (including computer enhancements), Health services projects</p>
Clinical Research	<p>Clinical Research includes all for profit corporation sponsored research (sponsor or prime sponsor, domestic or foreign) that involves patients or protected health information (PHI), or clinical testing or procedures, or drug/device diagnostic testing in humans or any planning/lab/clinical service in support of such clinical research.</p>