



Create a Service Request Pre-award Request

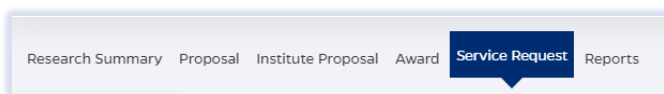
How do I create a Service Request for a requesting a Pre-award?

IMPORTANT NOTE:

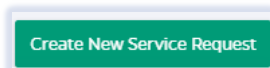
Before a Pre-award Request can be made a proposal development record must created and approved in Fibi, so that an Institute Proposal Number can be referenced in the Service Request.

Pre-award Request was previously completed in Webforms. Sponsored Projects Shared Services reviews and processes all requests.

- ❑ 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 – Institute Proposal** from the dropdown menu.

A screenshot of a form with two dropdown menus. The first dropdown is labeled 'Category' and has 'Institute Proposal' selected. The second dropdown is labeled 'Type' and has 'Pre-award Request' selected. Both dropdowns have a small 'x' icon to the right of the selected text.

- ❑ Choose the **Type – Pre-award Request** from 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.

A screenshot of a text input field labeled 'Subject'. The text inside the field is 'PRE-AWARD REQUEST/ SAP Responsible CC - /Dept. - / PI-'. The field has a light blue border and a small asterisk icon to the left of the label.

Enter the **SAP Responsible CC, department, and PI.**

- ❑ Enter the **Link Institute Proposal (IP)** that requires the Pre-award authorization. This field is an elastic search so the user can enter words from the title of the proposal, the PI's last name, the status of the IP, the IPN, as well as other criteria in order to find the IP.
- ❑ 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. In the case of Revisions, the PI must complete a Certification as well.

A screenshot of a 'Questionnaire' tab. The tab is labeled 'Questionnaire' and has a yellow background. Below the label, it says 'Pre-award Request' with a yellow warning icon.

After the questionnaire is completed the tab will change to **green**.

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.

A screenshot of the 'Comments' tab in a service request interface. The tab is highlighted in blue. At the top, there are tabs for 'Overview', 'Comments', 'Questionnaire', and 'History'. On the right, there are 'Validate' and 'Submit' buttons, and a back arrow. Below the tabs is a text area with the placeholder 'Write your comments here' and a character count '4000 characters remaining'. To the right of the text area is a 'Private Comment' checkbox and an 'Add' button. At the bottom left, there is an 'Add Attachments' link.

- ❑ 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. The record will be routed to Sponsored Projects Shared Services (SPSS) for review and approval.



UPON APPROVAL

Once Sponsored Projects Shared Services approves the Service Request, the user will receive an email notification that announces the status change.

The Pre-award # can be found in the **Comments** of the record.