A Guide for Research Administration Offices

Proposal and Service Request Review

For up-to-date information and other resources, please visit the ORIS website.

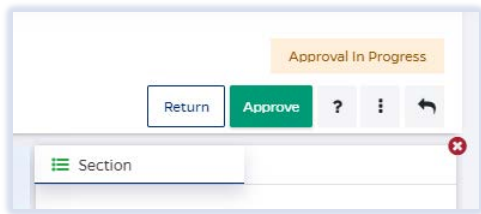Last Updated: 9/26/2023

Table of Contents

APPROVAL AND BYPASS APPROVAL

- ☐ Open a proposal with a status = Approval in Progress.
- ☐ Review all tabs and print a PD Summary (see instructions on the next page).

  Note: The Proposal tab is a summary of all information contained within the record.

- ☐ Either **Return** or **Approve** the record as desired.

- ☐ Include **Comments** as needed and confirm **Return** or **Approve**.
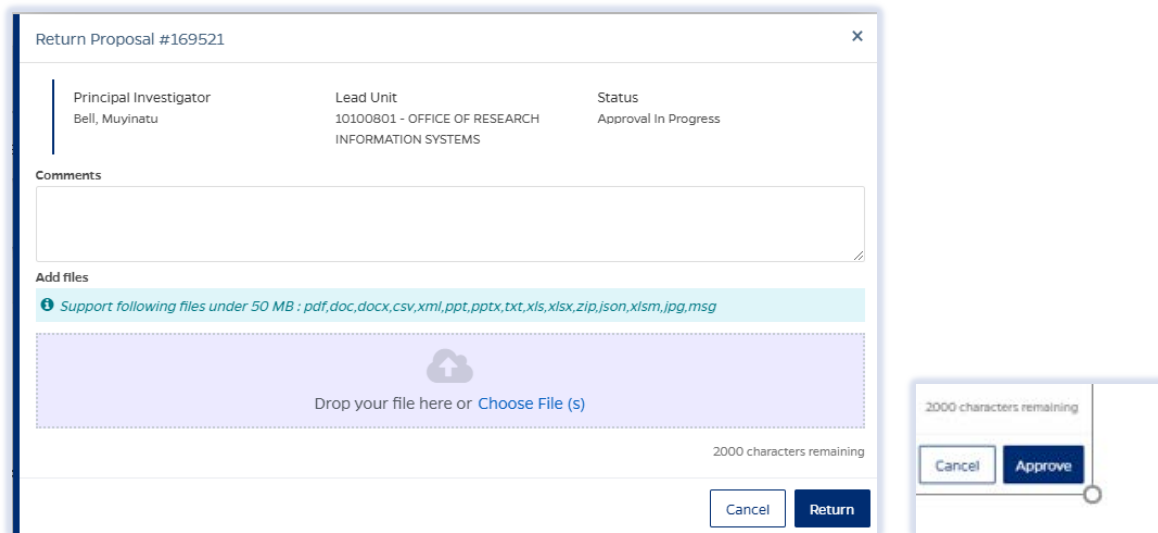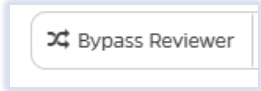

To Bypass an approver:

- ☐ Click on **Route Log** tab.
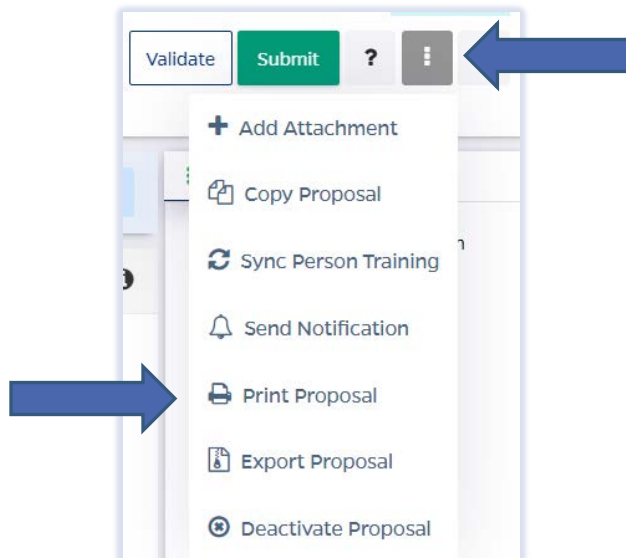

- ☐ Click on **Bypass Reviewer**.

⤫ Bypass Reviewer

☐ Input **Comments** and click on **Bypass** button.

Bypass Proposal #170078   ✕

Principal Investigator	Lead Unit	Status
Bell, Muyinatu	ELECT & COMP ENG - BELL	Approval In Progress

* Comments

2000 characters remaining

No   **Bypass**

To Print or View the PD Summary:

☐ Click on the **More Actions** icon ⋮ and then click on **Print Proposal** in the dropdown menu.

Validate	**Submit**	?	⋮

➕ Add Attachment

🗐 Copy Proposal

🔁 Sync Person Training

🔔 Send Notification

🖨 Print Proposal

🗎 Export Proposal

⊗ Deactivate Proposal

☐ Click on the box next to **Proposal Summary Form** and then click the **Print** button.
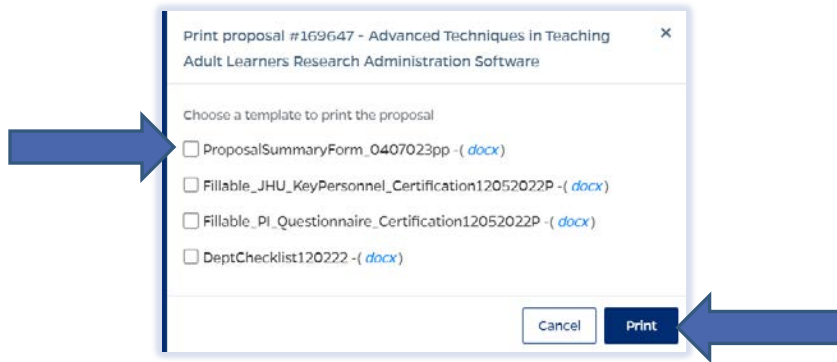
NOTE: **If the PD Summary will not open, turn off the Pop-up Blocker for the browser in use.**

The PD Summary is a Microsoft Word document and can be saved or printed as any other Microsoft Word document.

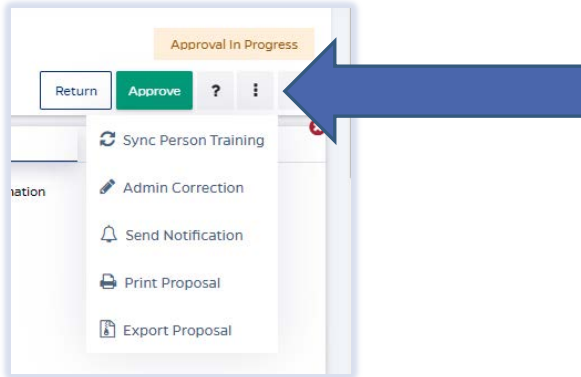☐ Click on **File** and choose the desired action from the menu.
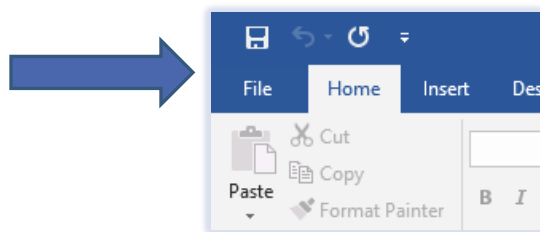
☐ Click on **Save**, **Save As** or **Print** as needed.

ADMIN CORRECTION TO A PROPOSAL

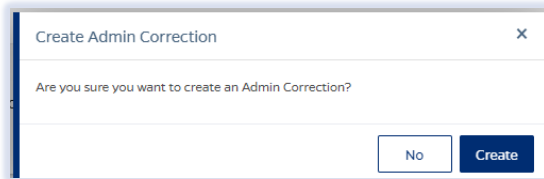☐ Open a proposal with a status = Approval in Progress.

☐ Click on the **More Actions** icon.

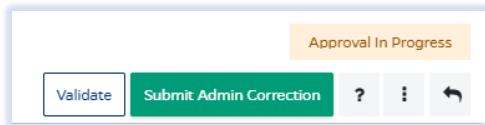☐ Choose **Admin Correction** from the dropdown menu.
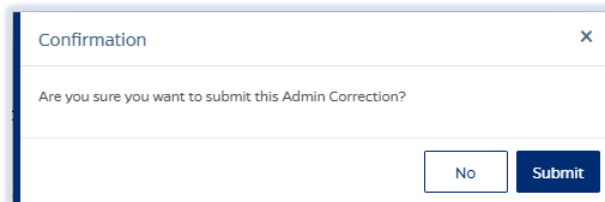

☐ Click on **Create** button.

☐ Make desired changes in the record.
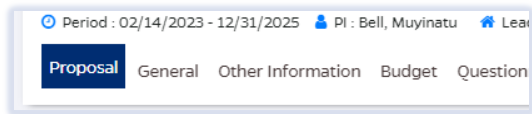☐ Click on **Submit Admin** Correction.
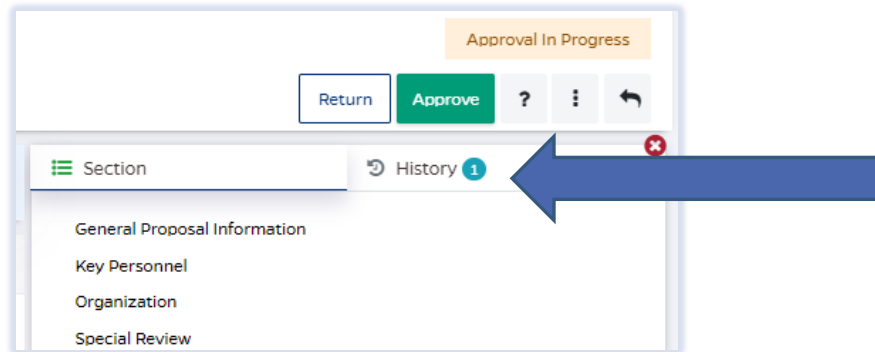

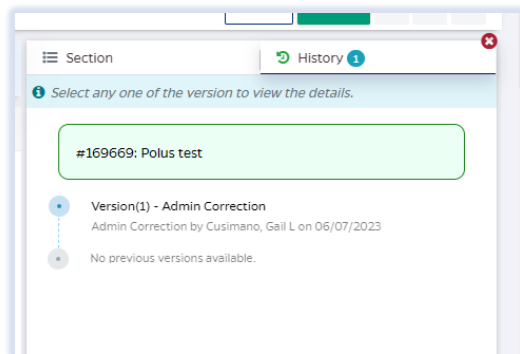☐ Click on the **Submit** button to confirm.

To review Admin Corrections:

☐ Click on **Proposal** tab.
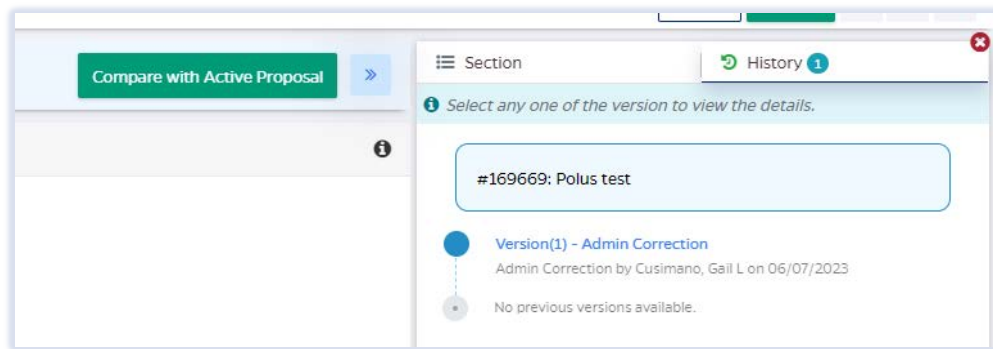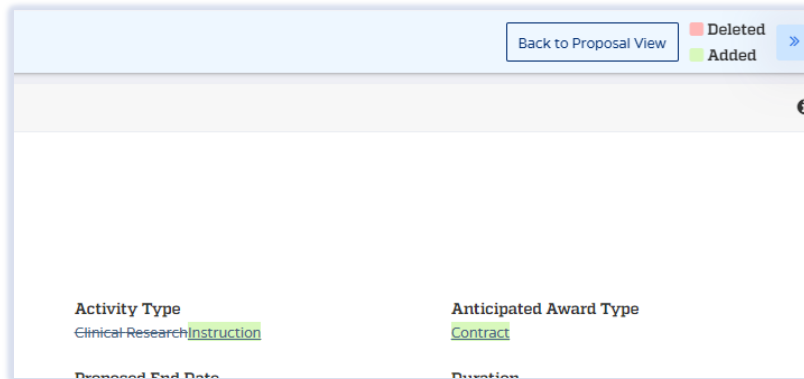

☐ Click on **History** in upper right corner.

The **Version History** will open:

☐ Click on the **Version** you want to review and the following will open:

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□ Click on **Compare with Active Proposal** to see changes. Deleted changes
show in red and Added changes show in green.

To cancel an Admin Correction without saving:

□ Click on the More Actions icon [⋮] and choose **Cancel Admin Correction** from
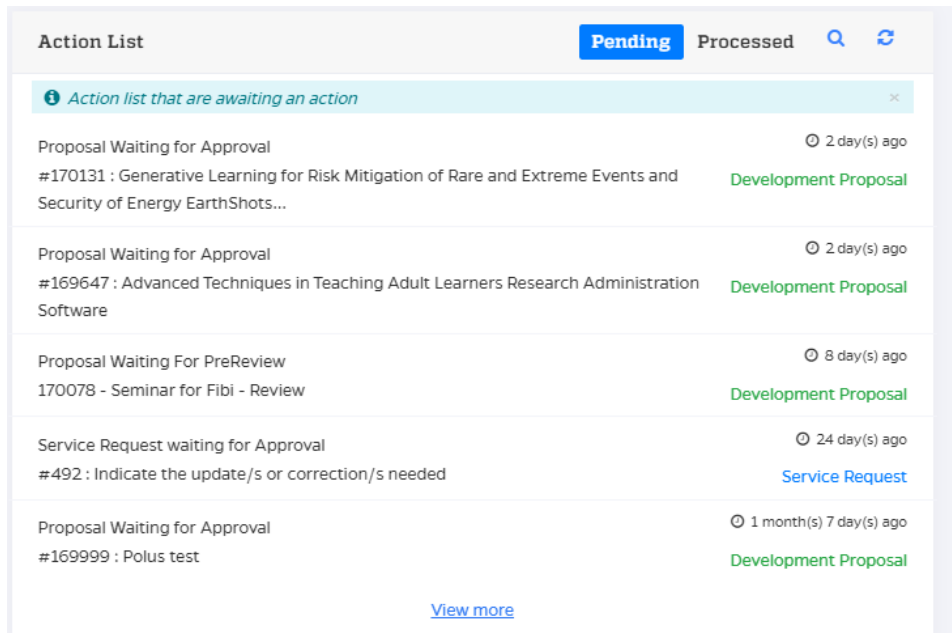the dropdown menu.

ORIS
JOHNS HOPKINS UNIVERSITY
OFFICE OF RESEARCH INFORMATION SYSTEMS
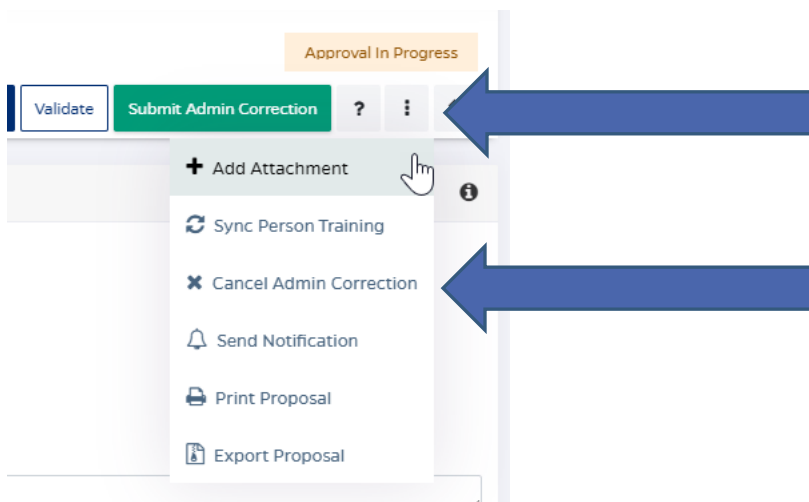
SERVICE REQUEST REVIEW

☐ Click on the **Service Request** (SR) tab and then click on the **Service Requests Pending My Review** tab.
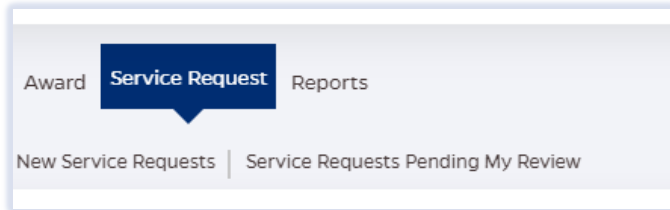
OR

☐ Click on the SR from the **Action List** widget on the Dashboard.

☐ Click on the desired SR to review.

☐ Review all tabs in the Service Request and click on **Return** or **Approve** as desired.

☐ Enter any comments and confirm by clicking on **Return** or **Approve** as appropriate.

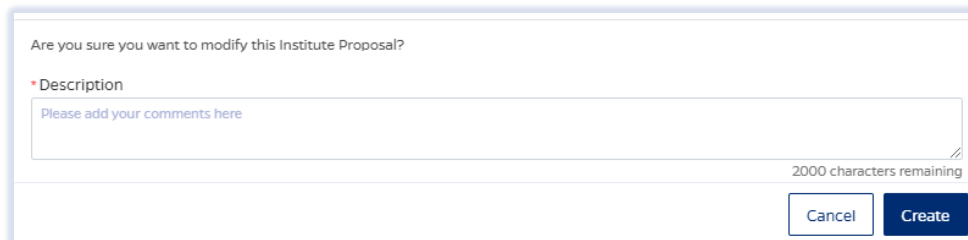☐ Status will change to **Approved.**

INSTITUTE PROPOSAL MODIFICATION

☐ Click on the Institute Proposal tab.

☐ Click on the **More Actions** icon [⋮] and choose **Modify Institute Proposal** from the dropdown menu.
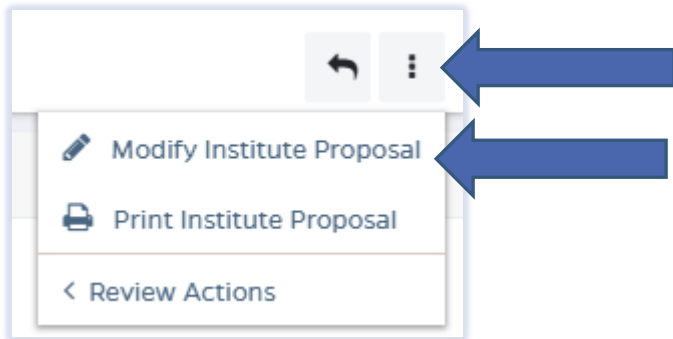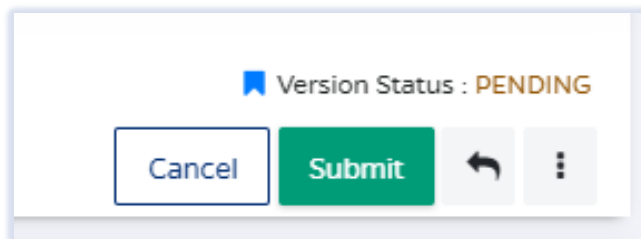

☐ Enter a description and click on **Create** button.
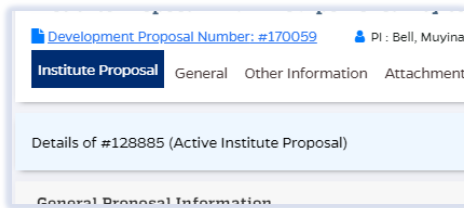

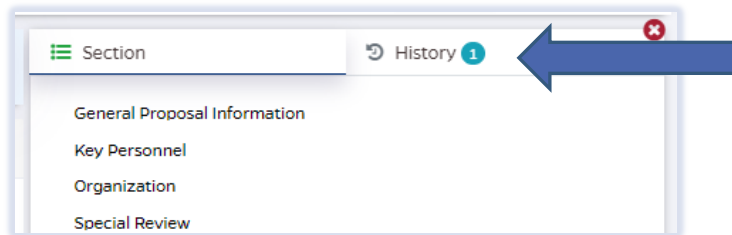☐ Make desired changes in the record.

☐ Click on **Submit**.

☐ Click on **Save & Submit** button to confirm.

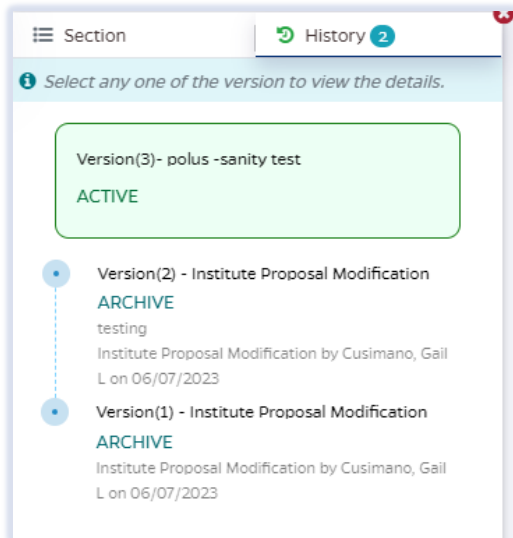# To review IP Modifications:

☐ Click on **Institute Proposal** tab.
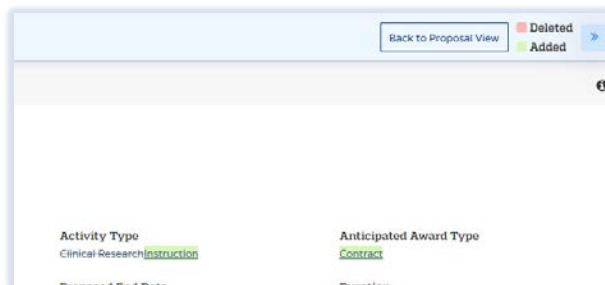

☐ Click on **History** in upper right corner.

The **Version History** will open:

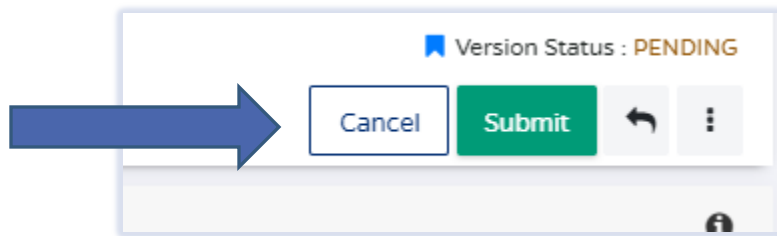☐ Click on the **Version** you want to review and the following will open:

☐ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.
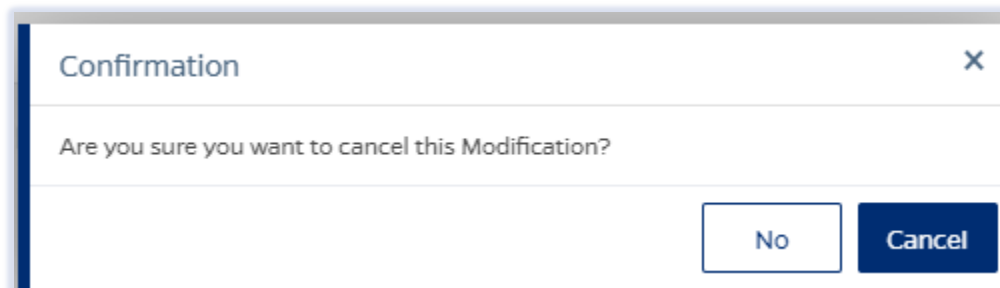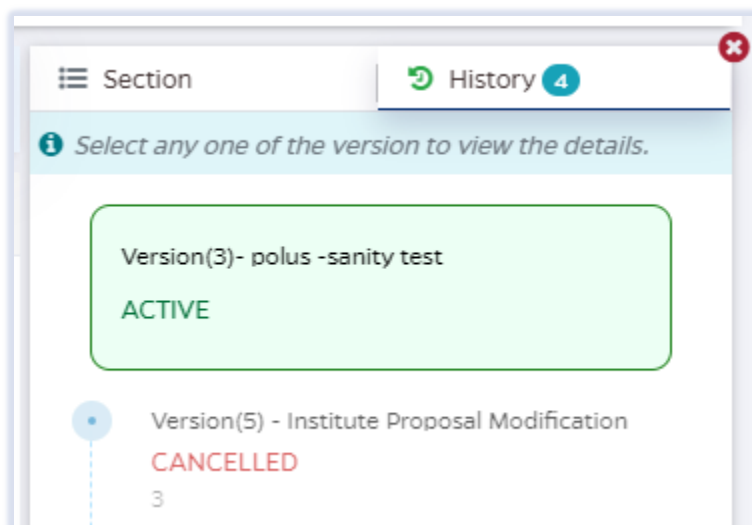
To cancel an IP Modification without saving:

☐ Click on the **Cancel** button.
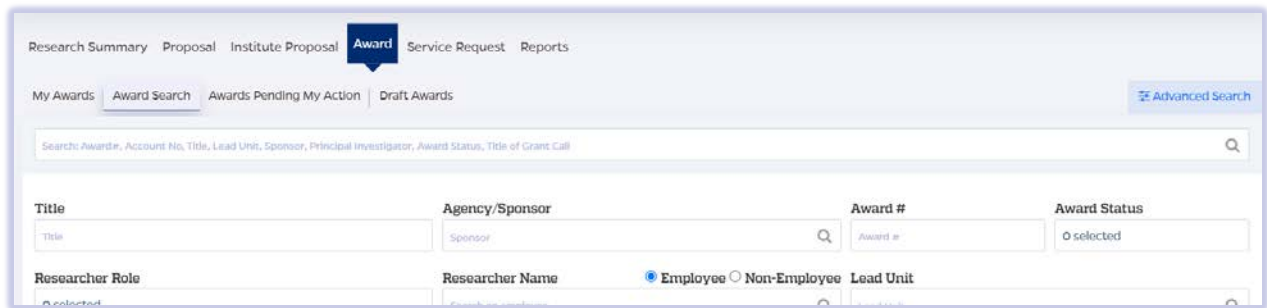

☐ Then click on Cancel to confirm.

The IP Modification will show as Cancelled in the **History**.
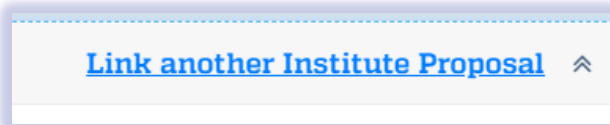
LINKING A SUPPLEMENT TO AN AWARD

From the Award Module:

- ☐ Find the **Award** under the **Award Search** and click on the link which opens the award.

- ☐ Click on the **More Actions** icon ⋮ and choose **Admin Correction** from the dropdown menu.

- ☐ Enter a description that says Link supplement and click on Create.

- ☐ Click on Link another Institute Proposal.

- ☐ Enter the IP information in the **Proposal Funding this Award** field.

☐ Click on **Link Proposal** button.

☐ Click on the **Submit Admin Correction** and choose **YES** to confirm.