



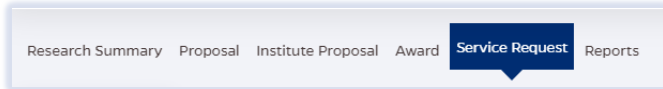
Create a Service Request

Carryover Prior Approval

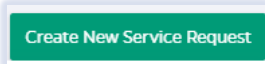
How do I create a Service Request for a Carryover Prior Approval?

❖ Carryover Prior Approval (previously known as Administrative Action in Coeus)

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



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



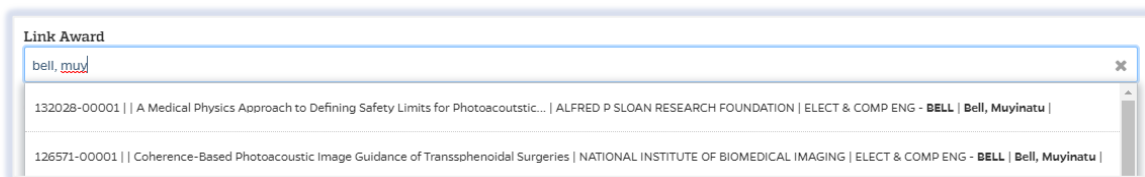
The following screen will open:

The **Priority** dropdown menu can be changed if needed to *low or high*.

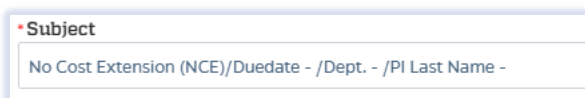
- ❑ The **Department** field is the lead unit or first 8-digits of the cost center. Begin typing the unit name and a dropdown menu with options will open.
- ❑ Choose the **Category** – **Award** from the dropdown menu; in order to link to the award.
- ❑ Choose the **Type** – **Carryover Prior Approval** from the dropdown menu.

- ❑ Complete the **Link Award** field as appropriate. This field is an elastic search.
To search the Link Award field, the user can input the sponsor, SAP award #, PI, or title.

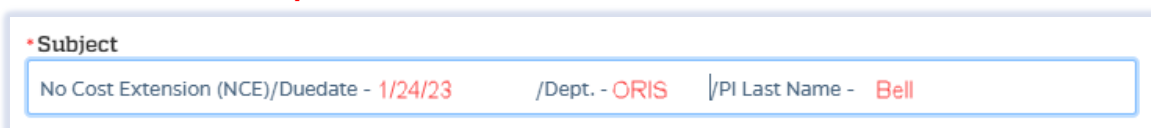
Once the appropriate award appears, click on the award in the dropdown menu.




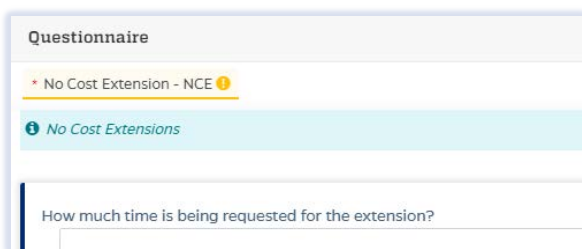
- ❑ Complete the Subject line in the **Subject** field. The first section of the Subject is the type of Service Request followed by other identifying information that the user will need to input.




Enter the **due date**, **department**, and **PI**.

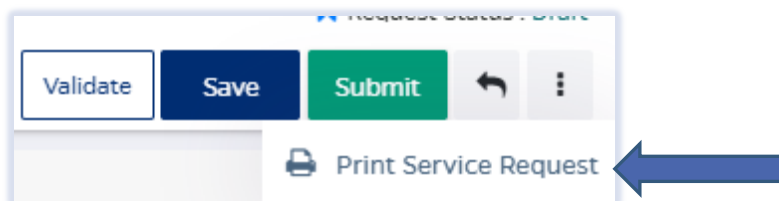


- ❑ Click on the **Save** button in the bottom right corner.  The Service Request has now been started and assigned a system number.
- ❑ Click on the **Questionnaire** tab and complete all questions on all questionnaires. Each questionnaire will begin as a **yellow** tab. There may be multiple questionnaires.

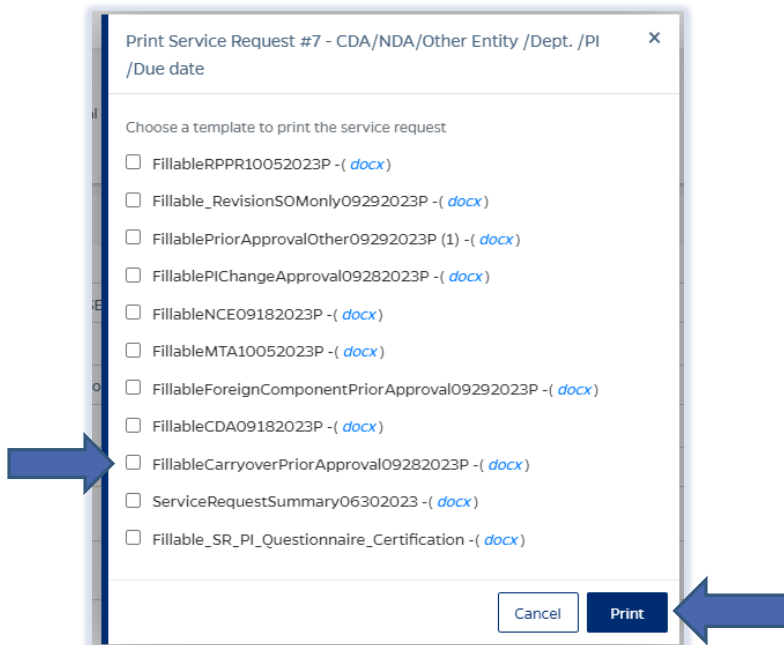


After the questionnaire is completed the tab will change to **green**.

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



- ❑ Choose **FillableCarryoverPriorApproval** from the list in the dropdown and then click on **Print**.

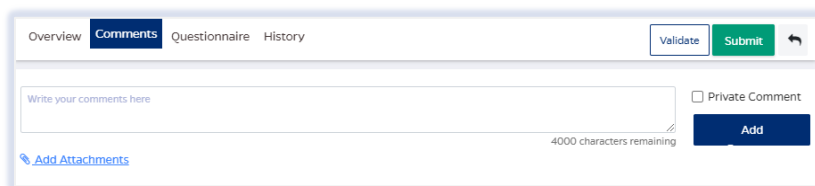


- ❑ Send the fillable form to the PI to be completed and signed.
- ❑ Complete all Questionnaire tabs according to the PIs provided answers.
- ❑ Upload the signed fillable form to the Service Request where the PI Certification is requested.

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, jpg, msg.



- ❑ Click on the **Validate** button in the upper right corner to determine if further action is required. Fix any errors and evaluate if any warnings require changes. A Service Request can be submitted with warnings, but all errors that display must be fixed before Fibi will be able to route the Service Request for approval.
- ❑ Click on the **Submit** button when ready to submit.

