

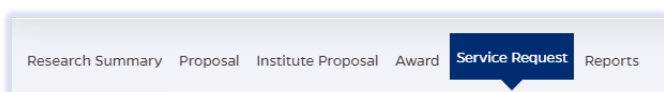


Create a Service Request Material Transfer Agreement (MTA)

How do I create a Service Request for an MTA?

- ❖ Material Transfer Agreement (MTA) was previously known as Negotiation Only in Coeus. This type of Service Request is only applicable for School of Medicine contracts. These requests should never involve funding.

- ❑ 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:

Priority : Normal Request Status : Draft

Overview

Summary

*Priority Normal

*Department 10100801 - OFFICE OF RESEARCH INFORMATION SYSTEMS

*Category Search for Category

*Type Search for Type

*Subject

Description

4024 characters remaining

Save

- ❑ 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 the **Category** – **Service Request** or **Award** from the dropdown menu.
 - Choose **Award** if this MTA should be linked to a previous award. Otherwise, choose **Service Request**.

- ❑ Choose the **Type – Material Transfer Agreement (MTA)** from the dropdown menu.


- ❑ Complete the **Link Award** field as appropriate. This field will not show if the user chooses the Service Request Type.

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.

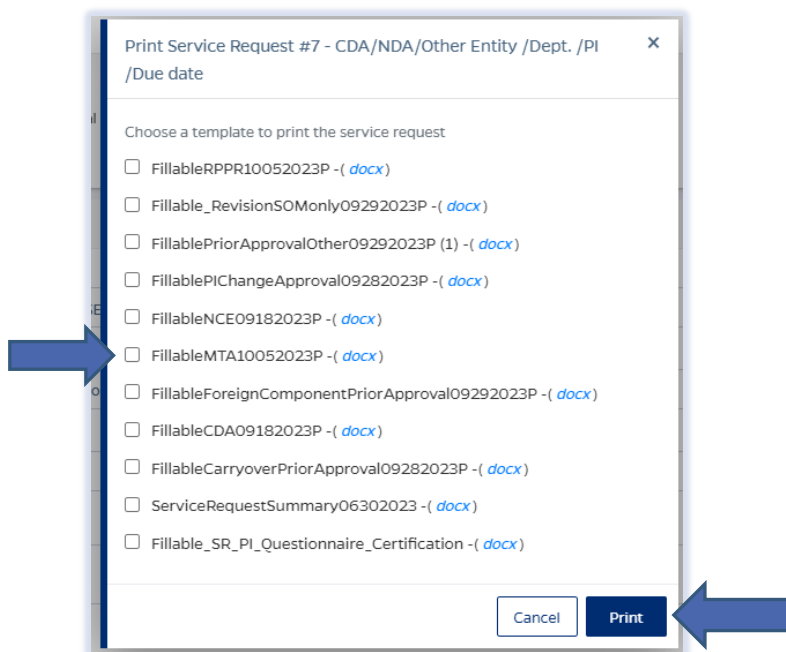
Enter the **due date, department, and PI.**

- ❑ 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 hand corner. 
- ❑ Click on **Print Service Request**.

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

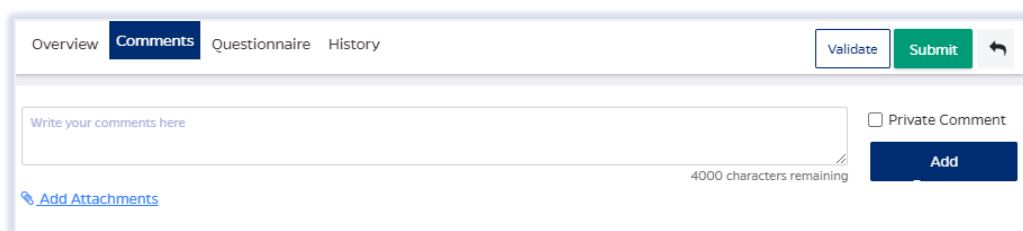


- ❑ Send the fillable form to the PI to be completed and signed.
- ❑ Complete all Questionnaire tabs according to the PIs provided answers.
- ❑ Upload the signed fillable form to the Service Request where the PI Certification is requested.

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.

