



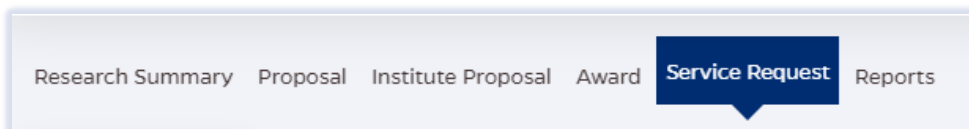
# Create a Service Request

## Data Use Agreement (DUA)

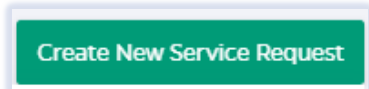
### *How do I create a Service Request for a DUA?*

❖ This type of Service Request is only applicable for School of Medicine departments.

❑ 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: Type here for Department

\* Category: Search for Category

\* Type: Search for Type

\* Subject: ?

Fill in missing information after each hyphen above.

Description

Paragraph

Save

- ❑ The **Priority** dropdown menu can be changed if needed to *low* or *high*.
- ❑ Begin typing the unit name or first eight digits of the cost center for the **Department** field and a dropdown menu with options will open. Choose the desired unit.
- ❑ Choose the **Category – Service Request** from the dropdown menu.
- ❑ Choose the **Type – Data Use Agreement (DUA) (SOM only)** 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.

**\* Subject ?**

DUA / Dept. / PI / Due Date


**i** Fill in missing information after each hyphen above.

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

- ❑ Click on the **Save** button in the bottom right corner.  The Service Request has now been started and assigned a system number.

- ❑ **DO NOT Add an Association.**

\*\*\*If the DUA relates to an award,

- ❑ Add the Award # or IP # in the **Summary Comments**. 

- ❑ Scroll down to the Key personnel section and click on **Add Key Personnel**. The following pop-up box will open.

Enter the PI in the Employee field and enter their Role. Click on **Add Key personnel**.

**Add Key Personnel** ✕

#9063 :

Reporter :  Priority : Normal

Department :

☒ Employee ? ☐ Non-Employee ?


Hopkins, John ✕ Role : Principal Investigator


Name	Designation	Home Unit	E-Mail	Phone
Hopkins, John	No data	000001 - JOHNS HOPKINS ENTERPRISE	jhopki13@johnshopkins.edu	No data


Department ? Search here to add more Departments Q % of Effort ? eg: 100, 99.99, 10.22, 25 etc



000001 - JOHNS HOPKINS ENTERPRISE ✕

Cancel Add Key Personnel

- ❑ Click on the **Certification** tab and click on the **bell icon**  next to the PI's name to send an email notification to them for completion of the Certification, Simplified Compliance and International Questionnaires.

**Key Personnel** 

 Hopkins, John

Principal Investigator  

- ❑ Click on the **Questionnaire** tab and complete all questions on the Data Use Agreement (SOM only) questionnaire. The PI can complete this questionnaire if preferred. Each questionnaire will begin as a **yellow** tab.

- ❑ DUA's require a SOW attachment which can be found under the **More Actions** : Menu.


- ❑ Click on the **More Actions** : button in the upper right hand corner.
- ❑ Click on **Print Service Request**.
- ❑ Choose **DUA SOW Attachment FDP** from the list in the dropdown and then click on **Print**. Save to your desktop.
- ❑ Edit the fillable form as appropriate and then upload to the **Attachment** tab.
- ❑ Upload the completed document to the last question in the Data Use Agreement Questionnaire.

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

Alternatively, if the PI will not complete the Questionnaires and Certification directly in Fibi:

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

- ❑ Choose **DUA** 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.

❑ Click on the **Comments** icon  located in various places throughout the record. Attachments can be added to comments if needed. 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.

If the Submit button does not show, the user will need to contact ORIS by emailing [oris@jhu.edu](mailto:oris@jhu.edu) to request access to the lead unit input on the General tab.