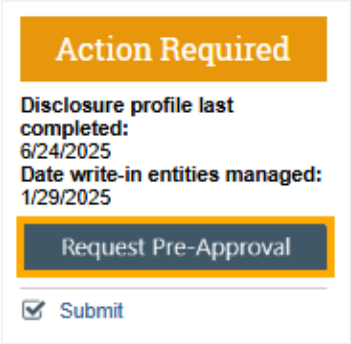
Quick Reference Guide

Submit a Pre-Approval Request (PAR)

PI's

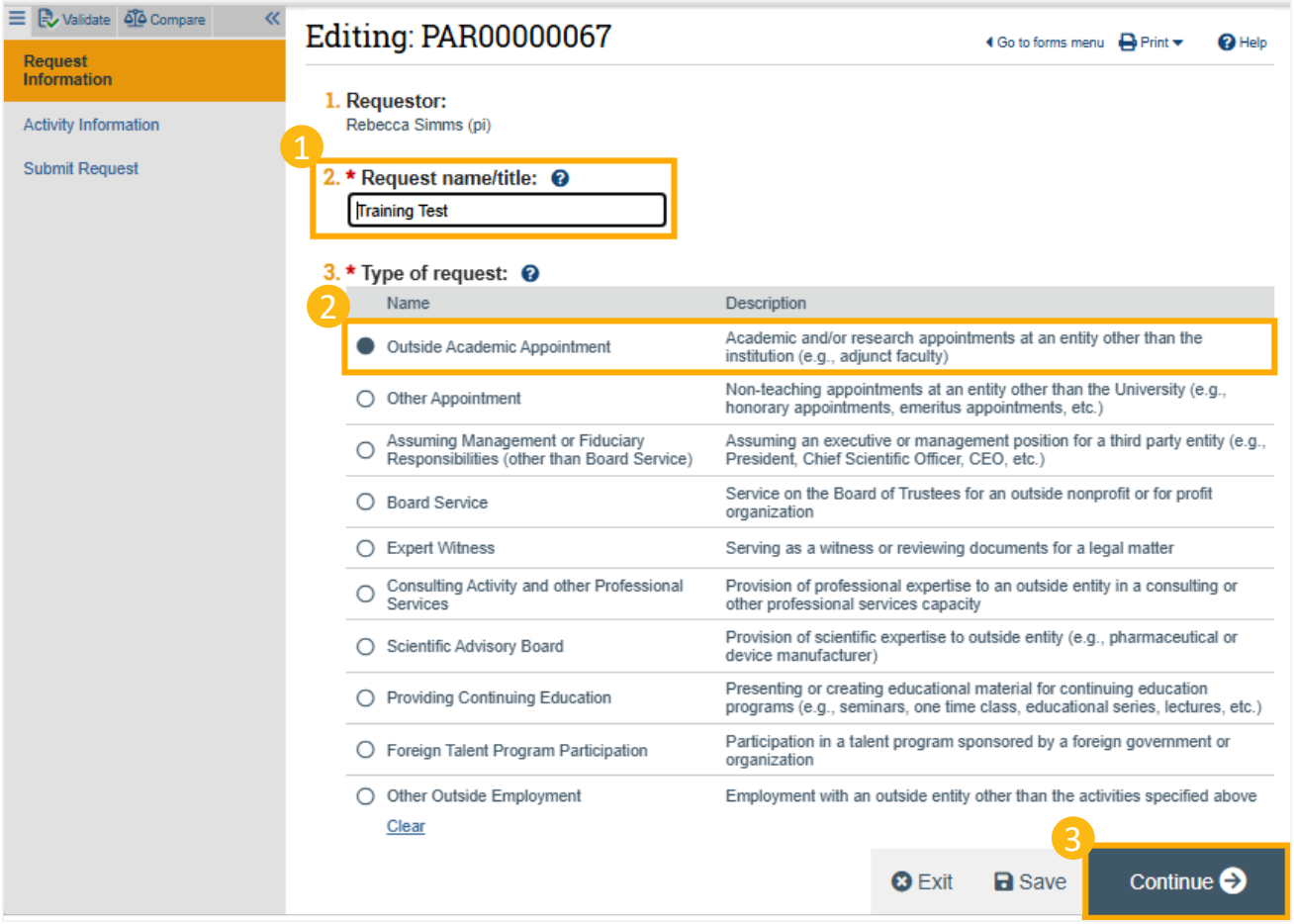
You may be required to request pre-approval before engaging in outside activities like outside academic appointment, board service, etc. This guide walks you through how to submit a Pre-Approval Request (PAR).

1. **Start on the disclosure profile workspace. To get pre-approval for an outside activity, click Request Pre-Approval. The pre-approval request smartform appears.**



2. **The requestor section is pre-filled by the system. Enter the request name/title and select the type of request. Then click Continue.**

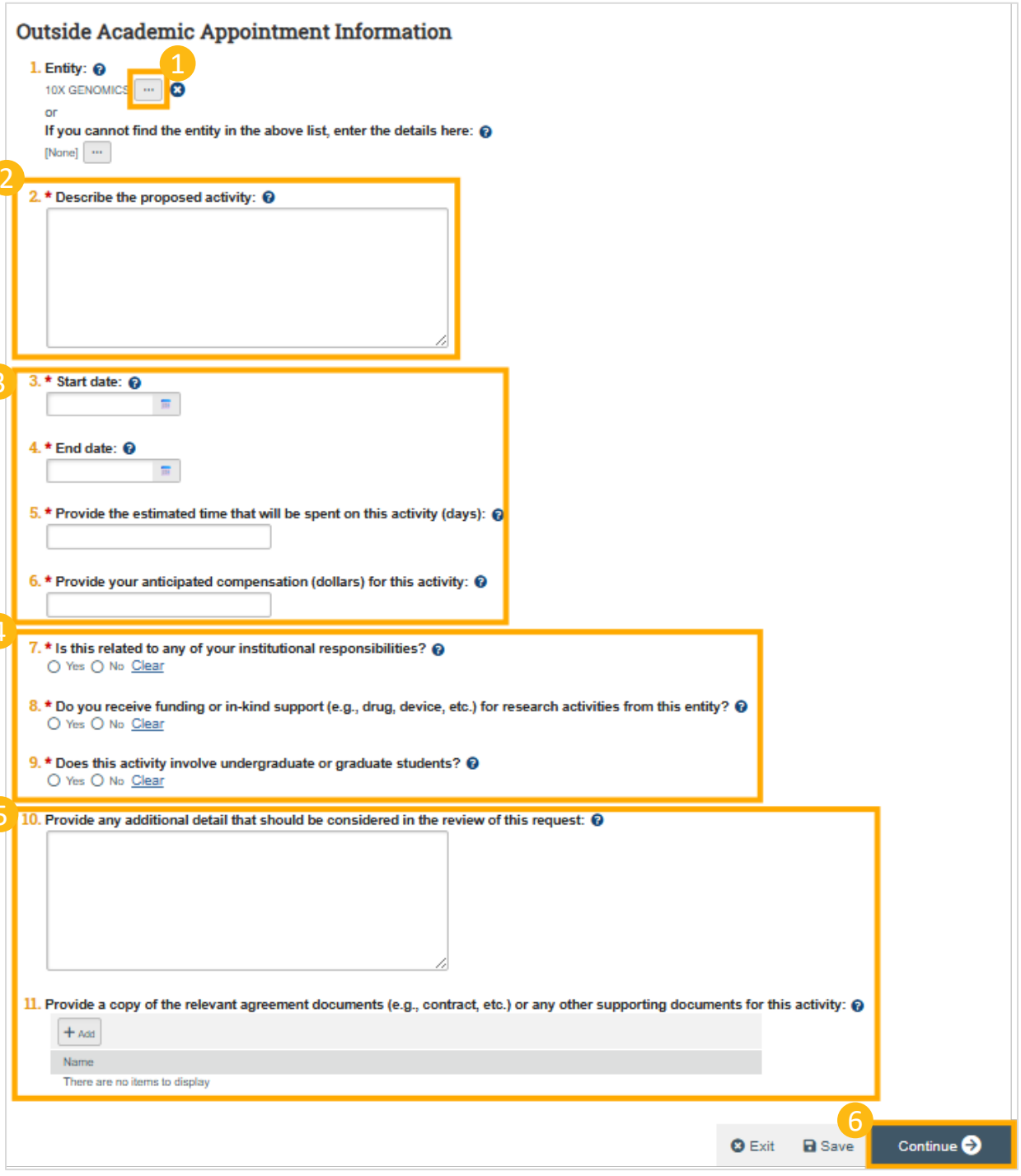
Note: you can only select one type of request per pre-approval request.



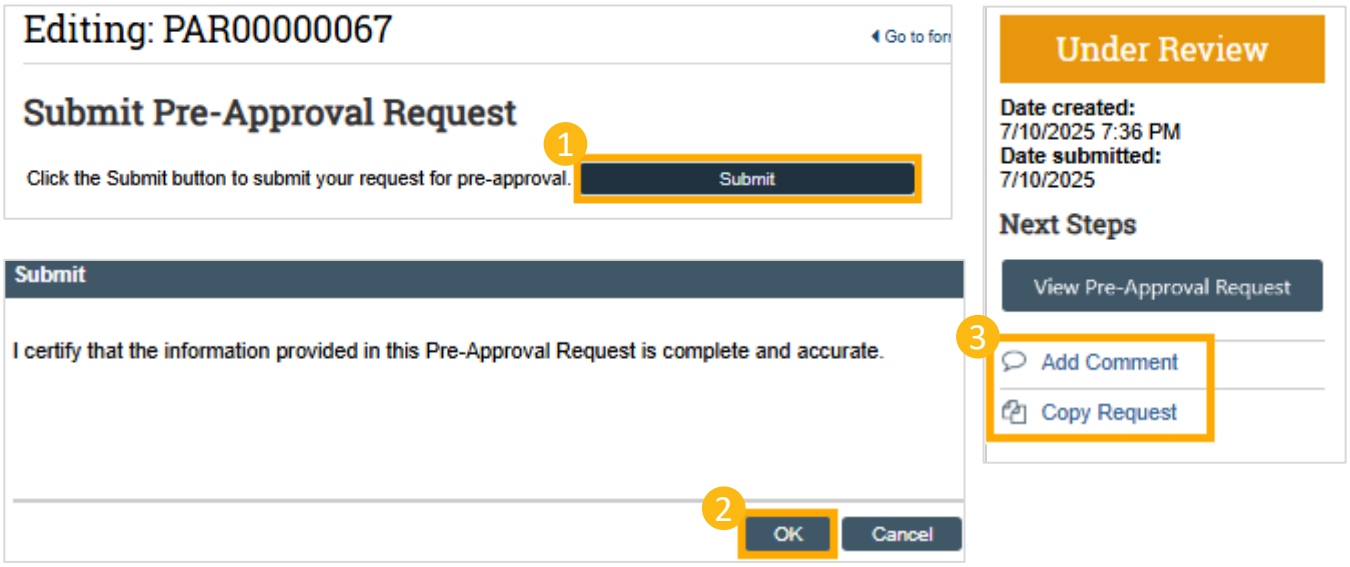
Submit a Pre-Approval Request (PAR)

3. **After clicking continue, instructions specific to the type of request you request appear. The below information provides an example of the "Outside Academic Appointment" selection. You may see a different page depending on the request type you chose on the Request Information page.**

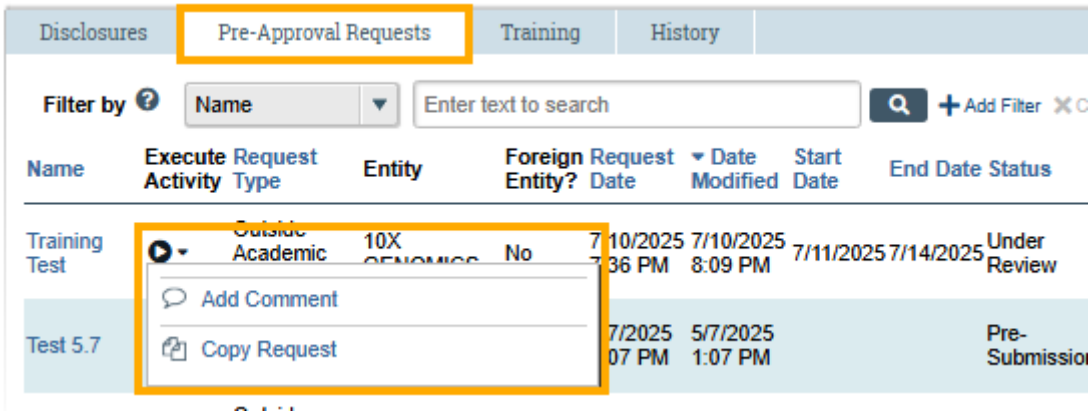
4. **On the form, select the entity by clicking on the three dots and choosing the entity from the list that appears. Describe the proposed activity, the start and end date, the amount of time you will spend on the activity, and your anticipated compensation. Additional questions may appear depending on your responses. If needed, provide any additional details or supporting documents, and click Continue.**



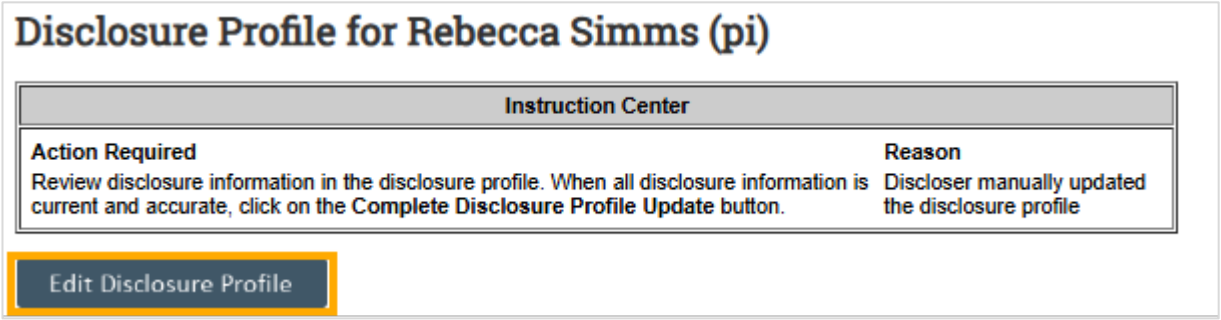
5. **The Submit Pre-Approval Request page appears. Click to send the pre-approval request for review, then click OK. The pre-approval request is now in the Under Review state. You can add a comment for the reviewer or COI administrator by clicking Add Comment. You also have the option to copy the request. This is handy if this particular request is reoccurring, or you need to start a pre-approval request similar to this one.**



6. **If you go back to the disclosure profile, you can see all the pre-approval requests under the Pre-Approval Request tab. The Execute Activity section shows all the activities you can perform on the request.**



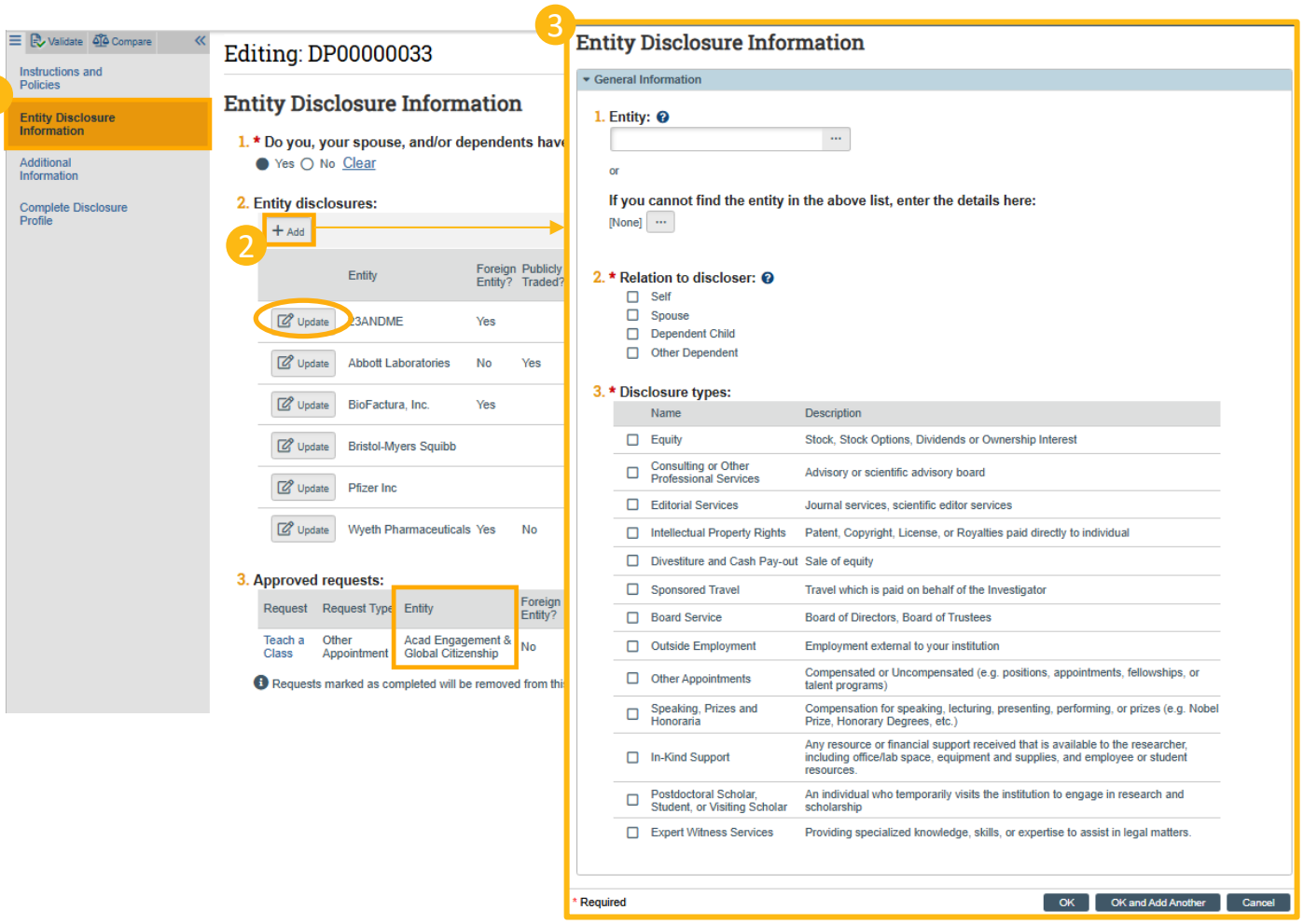
7. **There will be a period of time after your pre-approval request has been approved and when you'll need to enter the details as an interest in your Disclosure Profile. When it comes time to update your disclosure profile, you will open your disclosure profile and click Edit Disclosure Profile.**



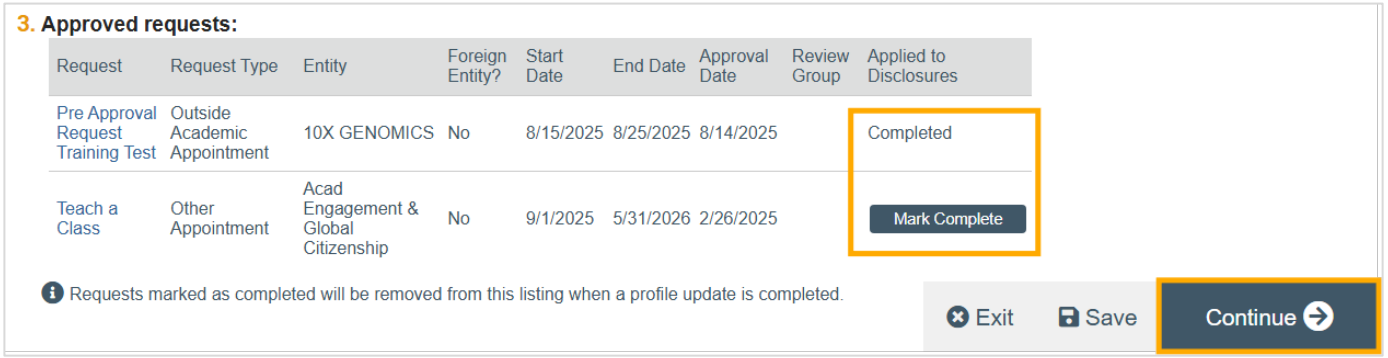
Submit a Pre-Approval Request (PAR)

8. **Navigate to the Entity Disclosure page the of the smartform. Add the entity from the pre-approval request to your entity disclosures. To do this, click Add, complete the form, then click OK.**

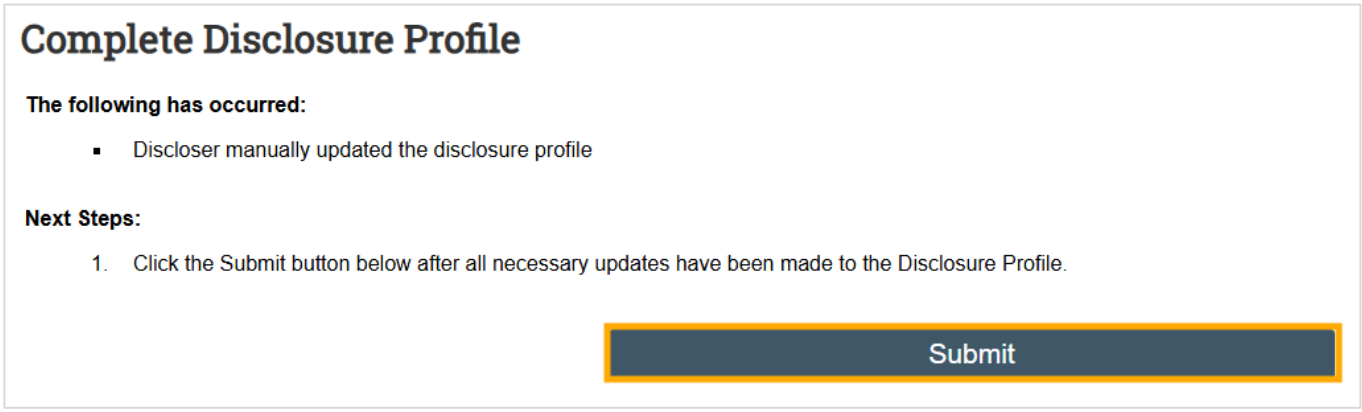
Note: if the entity from your request is already part of your entity disclosures, click Update, instead of Add.



9. **Once you've added the entity to your disclosures, click Mark Complete. After clicking Mark Complete, the button will turn grey and say Completed. Click Continue until you reach the Complete Disclosure Profile page.**



10. On the Complete Disclosure Profile page, click Submit to submit your Disclosure Profile updates.



11. Verify that the disclosure information you are submitting is accurate and current and click OK.

