Pre-Approval Request

A Pre-Approval Request allows you to submit a request to participate in certain outside activities (such as board service, outside academic appointment, expert witness, etc.), which is then reviewed by the appropriate individuals.

The Pre-Approval Request is proactive in nature, wherein you create requests in CAMS before you participate in those activities. The Pre-Approval Request is then sent for review by the appropriate reviewers, as determined by FSU. Based on the details of the Pre-Approval Request submitted, the reviewer makes an appropriate determination.

Pre-Approval Request Process

The discloser submits a Pre-Approval Request. The discloser will be notified if their Pre-Approval Request is approved or disapproved. The approved Pre-Approval Requests appear on the Approved requests section in your Disclosure Profile automatically. Once you complete the activity mentioned in this Pre-Approval Request, you can click the Mark Complete button. The Pre-Approval Requests marked as completed will be removed from the Approved requests section in your Disclosure Profile when your Disclosure Profile update is completed.

Note: These requests are still available for reference in the Disclosure Profile workspace, under the Pre-Approval Requests tab.

Submit a Pre-Approval Request

A Pre-Approval Request allows you to submit a request to participate in certain activities, which is then reviewed by designated individuals before making a determination. You can only select one activity in a Pre-Approval Request. If you have more than one activity that you need to request permission for, submit a Pre-Approval Request for each activity.

To create a Pre-Approval Request

1. From the Disclosure Profile workspace, click **Request Pre-Approval**.
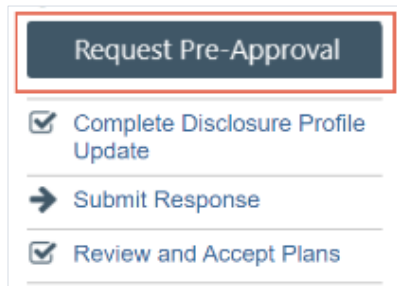
2. Enter a name for this Pre-Approval Request (e.g., "Board service for the Johnson Foundation", "Consulting for Acme Company", etc.).

3. Select the type of Pre-Approval Request that you want to submit. The type of request that you select here drives the questions that you have to complete for this Pre-Approval Request. Click **Continue** to move to the next page.

   Note: You can only select one type of request at a time. If you need to submit requests for more than one type, complete the details of the first type and then create additional Pre-Approval Requests.

4. Complete the page and click **Continue**.

5. On the final page, click **Finish**.
   You are taken to the Requests workspace.

   Note: You can continue to edit the Pre-Approval Request (Edit Pre-Approval Request button) until you submit it.

   > **Important!** Clicking Finish does not send the Pre-Approval Request for review. It remains in the Pre-Submission state. You can continue to edit the Pre-Approval Request until you submit it for review. When the study is ready for COI review, <u>you must submit it</u> using the steps that follow.

To submit a Pre-Approval Request from the Requests workspace

1. From the Top Navigator, click **COI** and then click **Requests**. The Requests page appears.
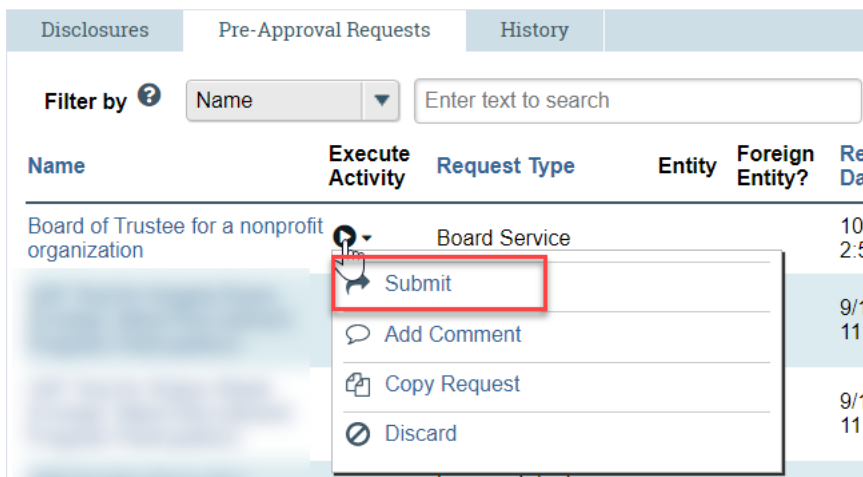
2. Click the **All Requests** tab.

3. Select the Pre-Approval Request that you wish to submit.

4. From the Requests workspace, click **Submit**.

Next Steps

Edit Pre-Approval Request

→ Submit

💬 Add Comment

📋 Copy Request

⊘ Discard
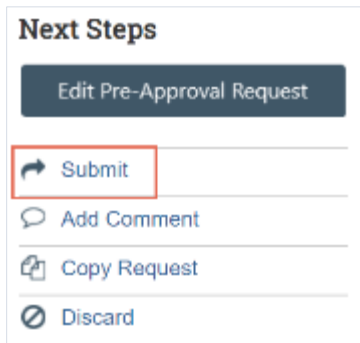
5. Click **OK** to agree to the terms.

To submit a Pre-Approval Request from your Disclosure Profile

1. From the Top Navigator, click **COI** and then click **Disclosures**. The Disclosure workspace appears.

2. On the Pre-Approval Requests tab, select the drop-down menu in the **Execute Activity** column of the Pre-Approval Request you wish to submit.

Disclosures	Pre-Approval Requests	History	

Filter by ❓ Name ▼ Enter text to search

Name	Execute Activity	Request Type	Entity	Foreign Entity?	Rec Dat
Board of Trustee for a nonprofit organization	◉ ▾	Board Service			10/2 2:53
	→ Submit				9/10 11:4
	💬 Add Comment				
	📋 Copy Request				
	⊘ Discard				9/10 11:4

3. Click **Submit** to submit this Pre-Approval Request for review.

4. Click **OK** to agree to the terms.
The Requests workspace appears. The Pre-Approval Request is submitted and moves to the Review state.
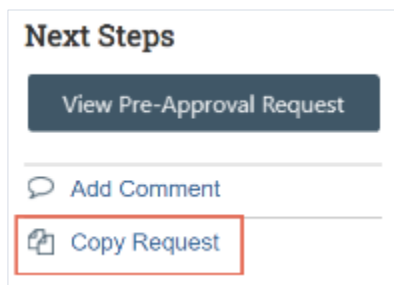
Copy a Pre-Approval Request

CAMS allows you to copy a Pre-Approval Request that you previously submitted. Copying a Pre-Approval Request is helpful when the Pre-Approval Requests are similar, but the start and end dates of the activity are different.

When you copy a Pre-Approval Request, all details, including the type of request and activity information are copied along with it. Once the Pre-Approval Request is copied, the new Pre-Approval Request can be edited before the new Pre-Approval Request is submitted for review. You remain the discloser for the new Pre-Approval Request, and it appears in your inbox.

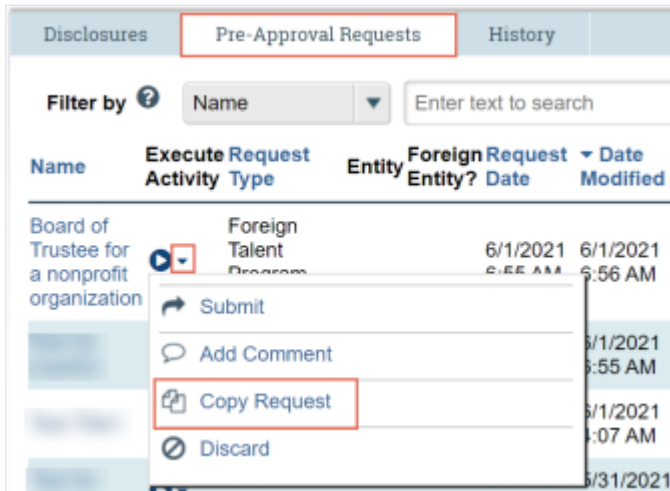### To copy a Pre-Approval Request from the Pre-Approval Request workspace

1. From the Top Navigator, click **COI** and then click **Requests**.
   The Requests page appears.

2. From the Requests page, select the Pre-Approval Request you wish to copy.

3. From the Pre-Approval Request workspace, click **Copy Request**.

4. Type a name for the new Pre-Approval Request in the New request name box.

5. Click **OK**.
   You are taken back to the Pre-Approval Request workspace.

6. On the History tab, click the new Pre-Approval Request ID link.
   The new Pre-Approval Request workspace appears.

To copy a Pre-Approval Request from your Disclosure Profile

1. From the Top Navigator, click **COI** and then click **Disclosures**.
   The Disclosure workspace appears.

2. On the Pre-Approval Requests tab, select the drop-down menu in the **Execute Activity** column of the Pre-Approval Request you wish to copy.

3. Type a name for the new Pre-Approval Request in the New request name box.

4. Click **OK**.
   You are taken back to the Disclosure Profile workspace.

5. The new Pre-Approval Request workspace appears on the Pre-Approval Requests tab. Click the new Pre-Approval Request to open it.

   Note: You can continue to edit the Pre-Approval Request until you submit it for review.

Add Comment to a Pre-Approval Request

You may want to add comments for reviewers to see when they review the Pre-Approval Request. When you add a comment, it appears in the Pre-Approval Request's history. Comments are viewable by any CAMS user who can view the Pre-Approval Request.

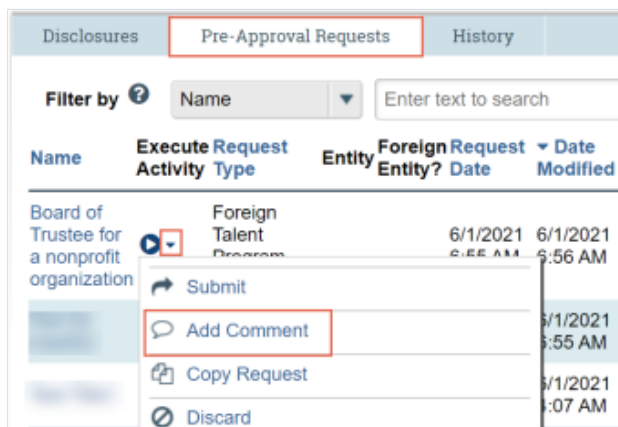**To add comment to a Pre-Approval Request**

1. From the Top Navigator, click **COI** and then click **Requests**.
   The Requests page appears.

2. From the Requests page, select the Pre-Approval Request to which you wish to add the comment.

3. From the Pre-Approval Request workspace, click **Add Comment** to add a comment that is visible to anyone with access to this Pre-Approval Request.
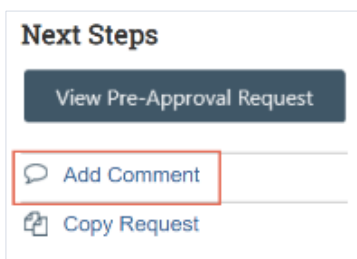
4. Type your comments.

5. If required, add supporting documents.

6. Select any roles related to this Pre-Approval Request that should receive an e-mail notification.

    Note: No one will receive duplicate e-mail notifications about your comment.

7. Click **OK**.

To add comment to a Pre-Approval from your Disclosure Profile

1. From the Top Navigator, click **COI** and then click **Disclosures**.
    The Disclosure workspace appears.

2. On the Pre-Approval Requests tab, select the drop-down menu in the **Execute Activity** column of the Pre-Approval Request you wish to copy.

3. Click **Add Comment** to add a comment that is visible to anyone with access to this Pre-Approval Request.

4. Type your comments.

5. If required, add supporting documents.

6. Select any roles related to this Pre-Approval Request that should receive an e-mail notification.

    Note: No one will receive duplicate e-mail notifications about your comment.

7. Click **OK**.
    You are taken back to the Disclosure Profile workspace.