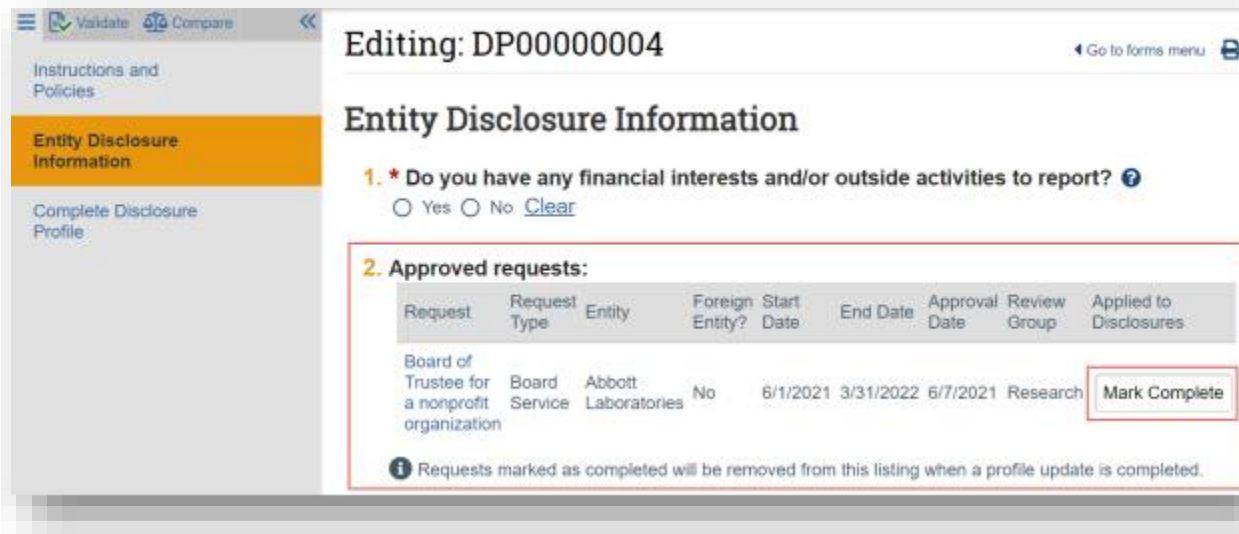## Pre-Approval Request

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 individual before making a determination.

The pre-approval request is pro-active in nature, wherein you create requests in RAMP COI before you participate in those activities. The pre-approval request is then sent for review by the appropriate reviewers, determined by the appropriate institutional officials in COI Settings. Based on the details of the pre-approval request submitted, the reviewer makes an appropriate determination.

Note: The pre-approval request feature depends on your institution's COI Settings.

Pre-Approval Request Process

When you submit a pre-approval request, you will be notified if it is approved or disapproved. Approved pre-approval requests appear on the Approved requests section in your disclosure profile. Once you complete the activity mentioned in this pre-approval request, you can select the Mark Complete button. 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.

Create and Submit a Pre-Approval Request

A pre-approval request allows you to submit a request to participate in certain activities, which is then reviewed 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
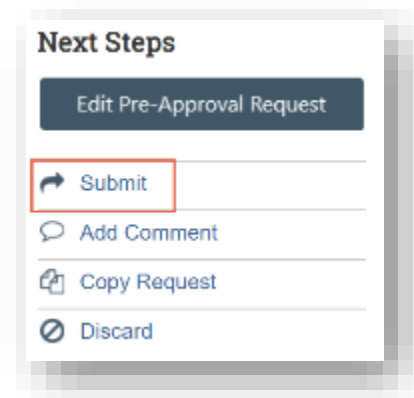1. From the disclosure profile workspace, click **Request Pre-Approval**.
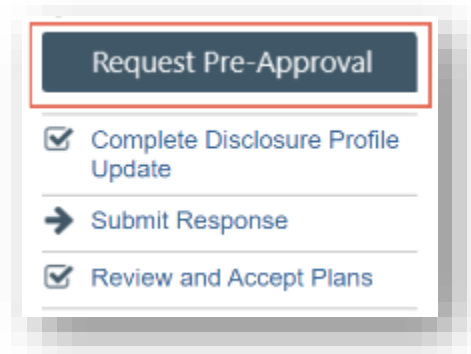
2. Enter a name for this pre-approval request.
3. Select the type of pre-approval request that you want to submit. The type of request that you select here drives the questions that you have to complete for this pre-approval request. Click **Continue** to move to the next page.
   Note: You can only 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 requests.
4. Complete the page and click **Continue**.
5. On the final page, click **Finish**.
   The newly created requests workspace appears.

> **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 (Edit Pre-Approval Request button) until you submit it for review. When the study is ready for COI review, you must submit it 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**.

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.
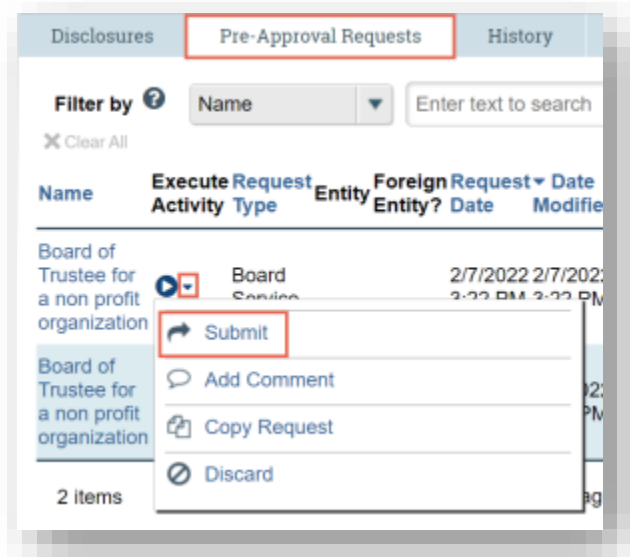
3. Click **Submit** to submit this pre-approval request for review.
4. Click **OK** to agree to the terms.
   The requests workspace appears. The pre-approval request is submitted and moves to the Review state.
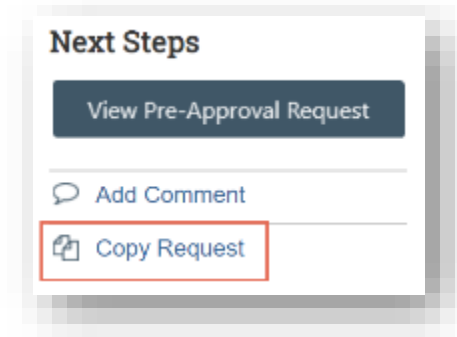
Copy a Pre-Approval Request

The COI system allows you to copy a pre-approval request that you previously submitted. Copying a pre-approval request is helpful if 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, open 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. Click the **Pre-Approval Requests** tab, select the drop-down menu in the **Execute Activity** column of the pre-approval request you wish to copy.
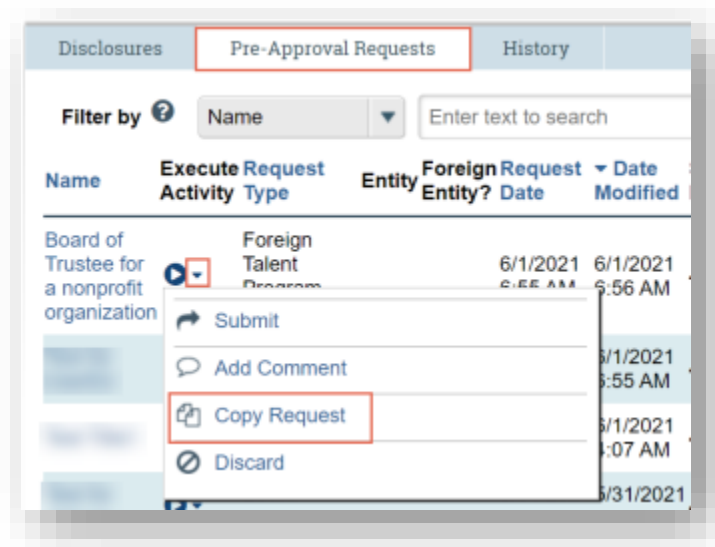

3. Type a name for the new pre-approval request in the **New request name** box.
4. Click **OK**.
   You are taken back to the disclosure profile workspace.
5. The new pre-approval request workspace appears on the pre-approval requests tab. Click the new pre-approval request to open it.
   Note: You 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 tab. Comments are viewable by any COI user who can view the pre-approval request.

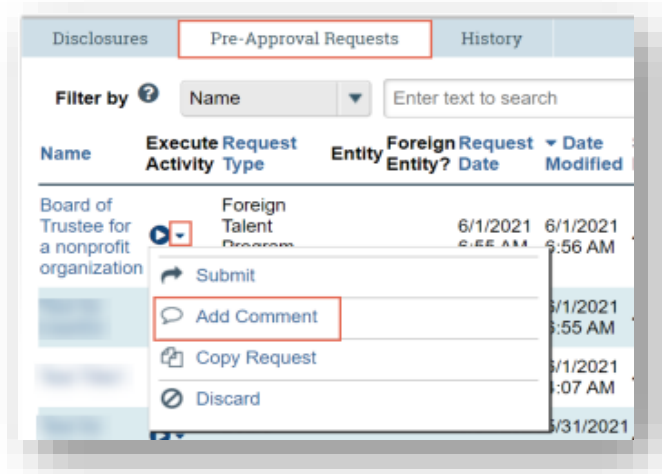**To add comment to a pre-approval request**
1. From the Top Navigator, click **COI** and then click **Requests**.
   The Requests page appears.
2. From the Requests page, select the pre-approval request to which you wish to add the comment.
3. From the pre-approval request workspace, click **Add Comment** to add a comment that is visible to anyone with access to this pre-approval request.
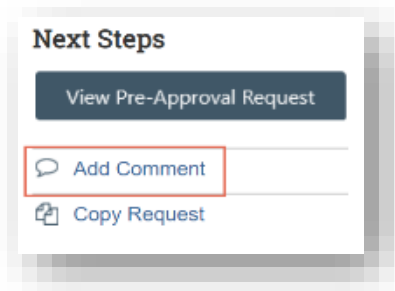
4. Type your comments.
5. If required, add supporting documents.
6. Select any roles related to this pre-approval request that should receive an e-mail notification.
   Note: No one will receive duplicate e-mail notifications about your comment.
7. Click **OK**.

To add a comment to a pre-approval request from your disclosure profile
1. From the Top Navigator, click **COI** and then click **Disclosures**.
   The Disclosure workspace appears.
2. Click the **Pre-Approval Requests** tab, select the drop-down menu in the **Execute Activity** column of the pre-approval request you wish to add comment to.

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.