IAF Approvals

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Requiring Additional Approvals

The IAF offers additional approval options from the "Approvals" tab for an individual record. If these additional approvals are set, they will be required before the IAF can be submitted to the central processing office. A submitting AOR or DRA has the ability to modify these approval options.

- **Research Dean Approval Options** (A) – This option allows for the requirement of "All Associated College Research Deans", "PI College Research Dean", or "No Research Deans (default)".
- **Require all approvals prior to proposal submission?** (B) – This option adds the following red text to all approval emails: "The college research office has required your approval".
- **Additional "Other" approvers** (C) – This allows the option to add additional approvers outside of the workflow approval process. The "Other" approver must have a person profile.

If a person has multiple pending approvals on a workflow, only one (1) approval is required.

Adding/deleting an “Other” approver

When adding an “Other” approver, enter the approver’s name or PSU user id and select from dropdown list. If the approver is not found, a "Request Add Person" will need to be made to create a person profile. Once the name is selected, click the "Add" button. Once released to workflow, the IAF must be recalled to add an “Other” approver. An added “Other” approver can be cleared and then deleted by clicking the delete button from the approval row when an IAF is recalled.

Clearing an approval

An approval can be cleared by a submitting AOR or DRA clicking the clear button from the approval row. The IAF must be recalled to clear an approval.

Re-sending an approval notice

When the IAF is in workflow, a submitting AOR or DRA can send a reminder to an approver who has not yet approved the IAF by clicking the reminder button from the approval row.

Approvers will receive a "Thank You" confirmation message after each successful approval.

Deleting Change Rule Other Approval (effective 01/12/2021)

In the case of Other Approvals that are added through change rules, AOR/DRA can delete the approval, if not applicable (e.g. user no longer with Penn State). AOR/DRA must enter a comment giving reason why the approval is being removed. Comment for the change rule approval being deleted is recorded in the IAF Summary Log.
Primary PI Approval Messaging (effective 09/15/2021)

If a General Ledger budget (GL) is linked to an IAF and the Fabricated Equipment answer is not in sync with the GL budget, a message ("Please contact your research administration office. General Ledger budget and fabricated equipment answer are not in sync.") will display not allowing the PI to approve the IAF.