

**About the Internal Form:**

The Internal Form workflow process is designed to meet the needs of USF's academic environment (signatory process follows the PI → Chair → Dean structure). While these positions are not used in every situation, the design (roles) must be assigned to someone. If your college, center, or system institution does not follow this structure, please submit a service request and the Sponsored Research will work with you to determine and setup the workflow for your area.

<http://www.research.usf.edu/requests/>

**Roles:**

**Principal Investigator (PI):** By default, all Internal Form system accounts start out as PI accounts. This access allows you to create an Internal Form for yourself, as the Principal Investigator, or as a Co-PI on someone else's Internal Form.

The following roles are available by [request](#):

**Administrator:** This level of access provides PI access functionality and allows you to sign Internal Forms as the Authorized Official (chair, dean, chancellor, VP, etc.)

**CRAN:** This level of access allows you to view all Internal Forms within your department and create Internal Forms for PIs within your department (you cannot make Internal Forms for yourself, as the PI with the CRAN role).

**College CRAN:** This level of access is similar to the CRAN role, but allows you to view and make Internal Forms for your entire college.

**General Information FAQs:**

[The password that was sent to me after registering doesn't work.](#)

- The four digit number that is e-mailed to you when you register is not used to log into the Internal Form system. This is your PIN and will only be used to sign the Internal Form.
- If you use your account to make Internal Forms for other people (CRAN) you will likely never use your PIN.

[I have lost my PIN or I never received a PIN.](#)

- Once you are logged into your Internal Form account, the last link in the middle of your screen is the "Retrieve PIN" link. Clicking this link will display your PIN.

I've forgotten my password or username.

- Above their respective fields on the sign in page each will have a link above them that will direct you to a recovery page.
- Once you have filled out the required fields and hit the submit button, you will receive an e-mail with your username or password.

The Internal Form system does not recognize my e-mail address.

- The Internal Form system does not tie into any other USF system. If any of your information changes (e-mail address, phone number, last name, etc.) you will need to manually update your Internal Form profile.

I need to update my Internal Form user profile.

- Once you have logged into your Internal Form account, the "Update User Profile" link is the third from the bottom in the center of the page.
- Once you have updated your information, make sure you click the "Update Profile" button at the bottom of the page. This will save your changes.

How do I delete an Internal Form?

- Currently you cannot delete an Internal Form on your own.
- Please change the title of the Internal Form to "**Delete.**" Once you have changed the title, please submit a [service request](#) asking that it be deleted.

My department is not listed when I am registering.

- Please submit a [service request](#) to have a new department added.

## PI Access FAQs:

When I log in I receive a "Page cannot be displayed error".

- It is likely that you have entered a character that is not recognized in the SQL (Internal Form) database. Examples include, using apostrophizes in a name or using parenthesis in your phone number.
- Because you cannot log into your account to correct this problem, you will have to submit a [service request](#) describing your problem.

#### Can I exit the Internal Form and finish it at a later date?

- Yes, at the bottom of each page of the Internal Form there is a “Save and continue” button.
- An Internal Form that is partially filled out or unsigned by the PI is considered an “Incomplete Existing Internal Form.”

#### I need to edit an Internal Form that I have signed.

- To edit a signed (locked) Internal Form, click the “Unlock a Form” link from your user console.
- **Unlocking a form will delete all signatures.**
- Once you have opened the new page, check the box next to the Internal Form you want to unlock and then click the “Unlock Form” link.
- Your unlocked form will now be in the “Incomplete Existing Forms” area.

#### The Internal Form has the wrong “department receiving credit”

- You will need to update your user profile to reflect the correct department.
- Once an Internal Form is created the PI and Co-PI’s information in the Internal Form will not update. You will need to either create a new Internal Form, have a CRAN/College CRAN update the PI on the Internal Form, or submit a service request, to have the department updated.

### CRAN Access FAQs:

#### When I create an Internal Form for the PI my information is pre-populated and un-editable.

- Your Internal Form account does not have CRAN access. Please submit a [service request](#) for CRAN access.

#### When adding a PI to the Internal Form I receive a “Page cannot be displayed” error.

- It is likely that they have entered a character that is not recognized in the SQL (Internal Form) database. Examples include, using apostrophizes in a name or using parenthesis in your phone number.
- Please submit a [service request](#) describing the error.

#### After adding a PI to the Internal Form the form disappeared.

- As a CRAN member you are able to see all Internal Forms for your department. If you add a PI to an Internal Form that is not in your department, the form will “disappear.”
- To find the form you will need to update your profile to reflect the new department.
- If you do not know what department the PI is in, please submit a [service request](#) with a description of the problem and the PI’s name.

I need to edit a signed Internal Form.

- A signed Internal Form must be unlocked before it can be edited.
- **Unlocking a form will delete all signatures.**

**“Authorized Official” (Chair, Dean, VP, Chancellor, etc.) Access FAQs:**

Multi-Role Signature Issues:

- If you are signing in a combination of roles (PI and Chair, Co-PI and Dean, Chair and Dean, etc.) you'll need to be mindful of each role within the workflow process.
- On the last page of the signatory process you will have a drop down menu, labeled “Signing as”. Make sure to select the appropriate role.
- If you are signing as the Co-PI and you accidentally select “Chair” you will put your signature in the Chair slot and possibly break signatory process.
- If you receive a “This form has already been signed and the original decision will not be overwritten” screen, double check that you have the correct role selected. If you are signing as the “Chair,” but you have selected the Co-PI role, you will receive that error.

I have signed the Internal Form and received the screen saying my decision was cast successfully, but it is still in my queue.

- Please submit a [service request](#) describing your issue. Please include the PI's name and the title of the Internal Form and/or the Form ID.

There is an Internal Form in my queue that I shouldn't be signing.

- It's possible that after the form was created the PI or Co-PI moved departments.
- Once an Internal Form is created the PI and Co-PI's information in the Internal Form will not update.
- Please submit a [service request](#) describing your issue. Please include the PI's name and the title of the Internal Form and/or the Form ID.