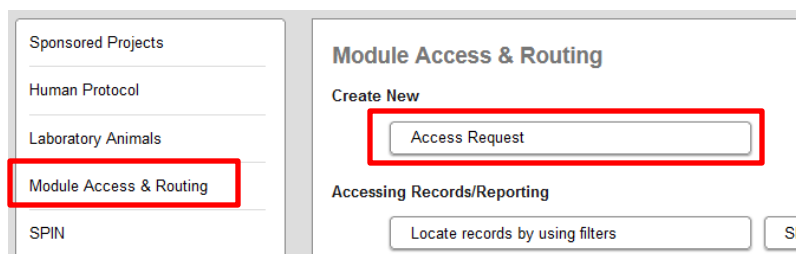


## Overview


By default, University research staff can access PennERA with their PennKey. This access, however, is limited to records for which a user is PI. Users needing expanded access/roles in the PennERA application can request this access via the **Module Access & Routing Assignment Request** form, available in PennERA.

## Creating and Submitting an Access & Routing Request Form

- After logging into PennERA with your PennKey, click “Module Access & Routing” from the sidebar menu.
- Click Create New > “Access Request”.



## Identification Information

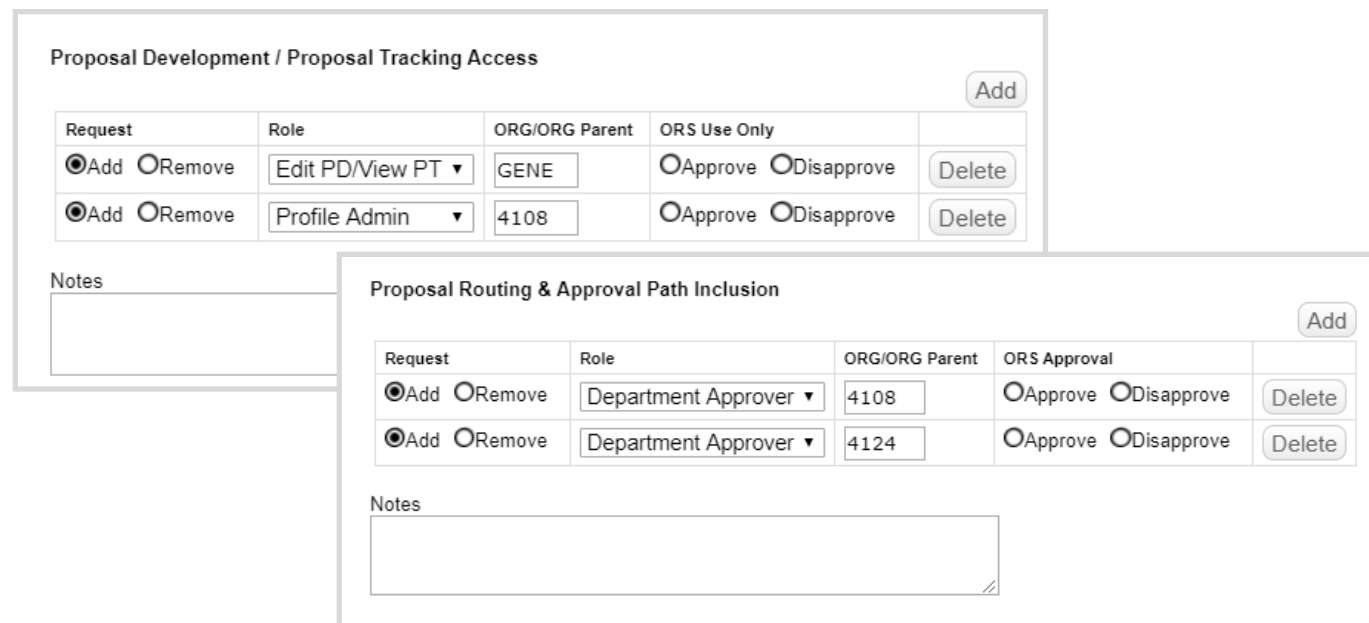
In this section, users will identify the assignee of the access as well as that individual’s supervisor. To select someone other than yourself for either role, answer “No” and use the  icon to select the appropriate person.

## Access Request

In this section, users will choose the type of request (Add, Update, Remove) and the module to be updated.

- In each Module section, users must click **Add** to create a request line, then choose the **Request**, **Role**, and **ORG/ORG Parent**. A **Notes** field is present if further explanation is needed.
- In *Proposal Development/Proposal Tracking*, *Human Subjects Management*, and *Lab Animals Management*, users will choose the desired access level.
- In *Proposal Routing & Approval Path Inclusion*, users will choose the desired approval role.

*Note: The Department Approver role must be assigned at the ORG level. Please specify individual ORGs.*



**Proposal Development / Proposal Tracking Access**

Request	Role	ORG/ORG Parent	ORS Use Only	
<input checked="" type="radio"/> Add <input type="radio"/> Remove	Edit PD/View PT ▼	GENE	<input type="radio"/> Approve <input type="radio"/> Disapprove	Delete
<input checked="" type="radio"/> Add <input type="radio"/> Remove	Profile Admin ▼	4108	<input type="radio"/> Approve <input type="radio"/> Disapprove	Delete

Notes

**Proposal Routing & Approval Path Inclusion**

Request	Role	ORG/ORG Parent	ORS Approval	
<input checked="" type="radio"/> Add <input type="radio"/> Remove	Department Approver ▼	4108	<input type="radio"/> Approve <input type="radio"/> Disapprove	Delete
<input checked="" type="radio"/> Add <input type="radio"/> Remove	Department Approver ▼	4124	<input type="radio"/> Approve <input type="radio"/> Disapprove	Delete

Notes

- Once the form is completed, users must click **Submit** to submit the form for review.
- The review consists of the assignee’s supervisor (identified on the form), the School/Center Access Administrator (identified by each School and maintained by the PennERA team), and the appropriate Module Administrator(s) based on the request (ORS, IRB, OAW).
- Once the review is complete and all approved roles have been assigned, the assignee and supervisor will receive an automated system message notifying them of the completed processing of the request.

For assistance, please contact PennERA Help [PennERAhelp@lists.upenn.edu](mailto:PennERAhelp@lists.upenn.edu).