Quick Sheet: Funding Memo Approval – AD Role

Audience: Administrative Director (AD) Role

PURPOSE

The purpose of this Quick Sheet is to provide instructions on how a user with the Administrative Director (AD) role can concur, non concur, or reject the Funding Memo.
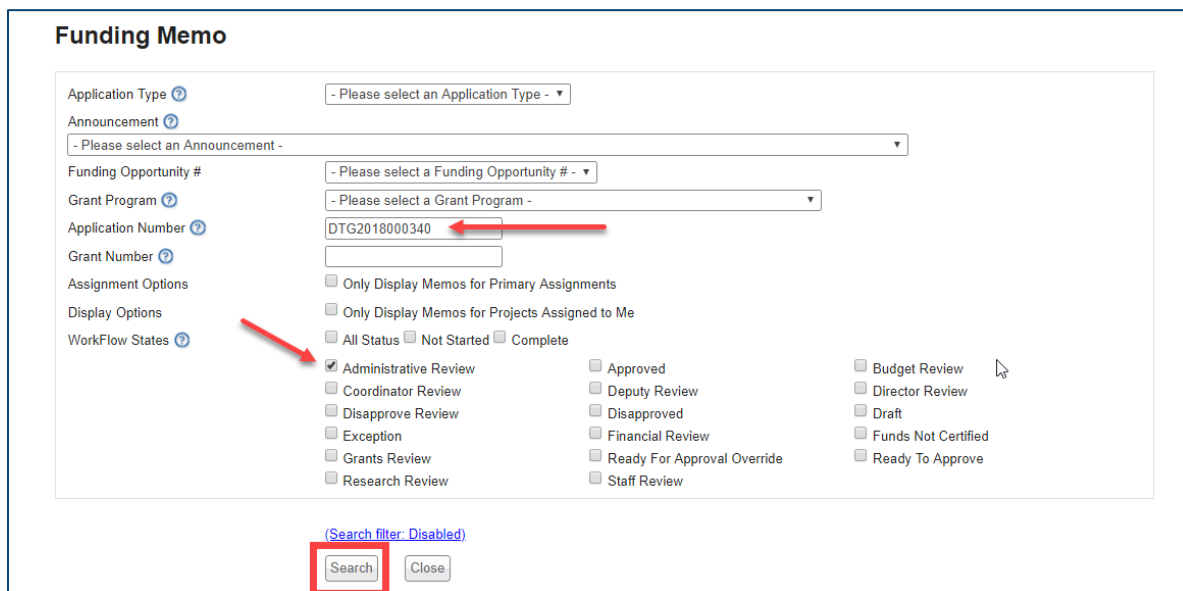
CONCUR FUNDING MEMO

When the AD is ready to indicate approval of the Funding Memo, they select the Concur link from the "Funding Memo" screen.

1. Select **Applications → Funding Memo** from the Menu bar.


2. The "Funding Memo" screen appears. Search for a single application by entering an **application number,** or search for multiple applications by using the *Workflow State* **Administrative Review**.

3. The results table displays. From the *Action* column, click the **Concur** link for each individual grant.

*Note: To concur more than one application at a time, click the checkbox next to each desired application and then click the **Concur** button at the bottom of the screen.*
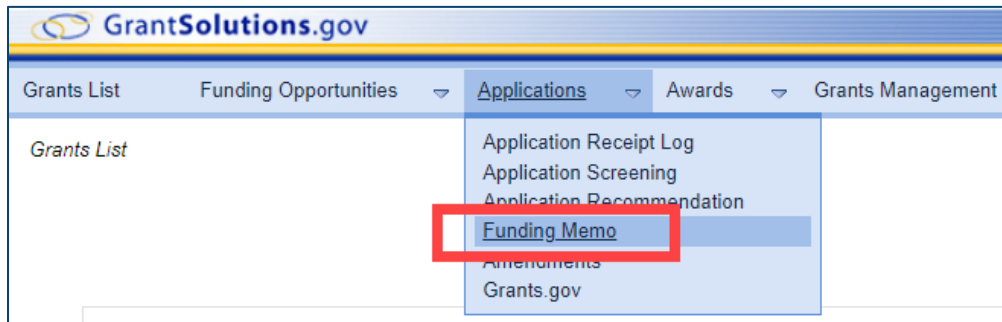
4. A transition screen appears. Click **OK**.

Note: Comments are optional.

REJECT FUNDING MEMO

An AD may return the Funding Memo to the Program Officer (role) for edits.

1. Select **Applications → Funding Memo** from the Menu bar.

2. The "Funding Memo" screen appears. Search for a single application by entering an **application number,** or search for multiple applications by using the *Workflow State* **Administrative Review**.

3. The results table displays. From the *Action* column, click the **Reject** link.

*Note: To return more than one application at a time, click the checkbox next to each desired application and then click the **Reject** button at the bottom of the screen.*

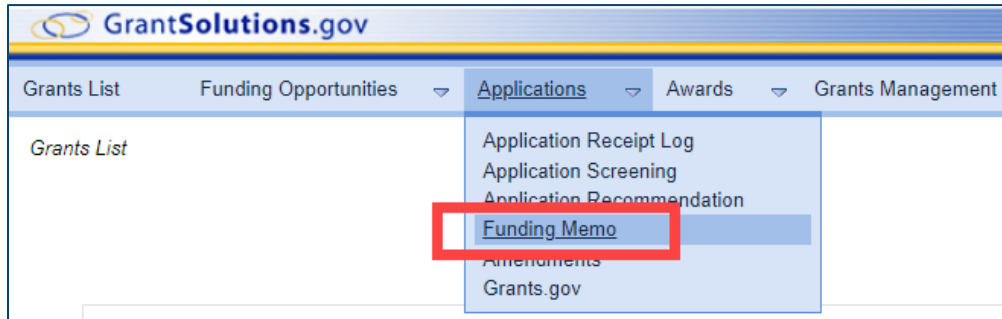4. A transition screen appears. Enter a comment (required) and then click **OK**.

NON CONCUR

An AD may not concur with the Funding Memo if they do not agree but still want the Funding Memo to move forward in the process.

1. Select **Applications** → **Funding Memo** from the Menu bar.

2. The "Funding Memo" screen appears. Search for a single application by entering an **application number,** or search for multiple applications by using the *Workflow State* **Administrative Review**.

3. The results table displays. From the *Action* column, click the **Non Concur** link for each individual grant.

*Note: To non concur more than one application at a time, click the checkbox next to each desired application and then click the **Non Concur** button at the bottom of the screen.*

4. A transition screen appears. Enter a comment (required) and click **OK**.