

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.

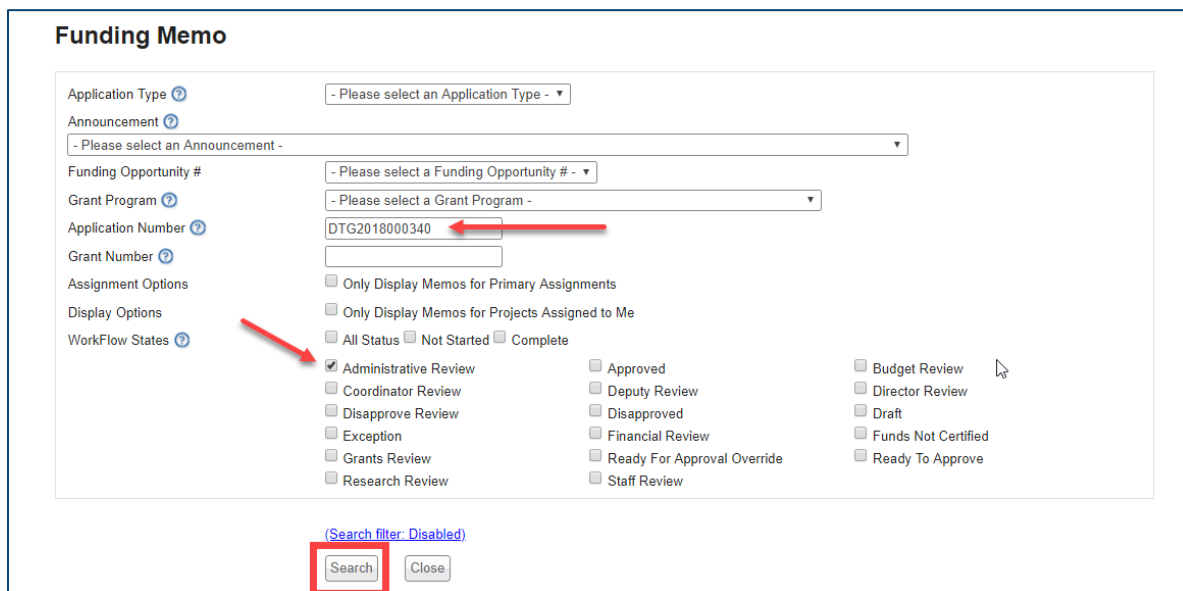
CONCUR FUNDING MEMO

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**.





Funding Memo


Application Type 

Announcement 

Funding Opportunity #


Grant Program 

Application Number 

Grant Number 

Assignment Options

Display Options

Workflow States 

☐ Only Display Memos for Primary Assignments

☐ Only Display Memos for Projects Assigned to Me

☐ All Status ☐ Not Started ☐ Complete

☒ Administrative Review

☐ Coordinator Review

☐ Disapprove Review

☐ Exception

☐ Grants Review

☐ Research Review

☐ Approved

☐ Deputy Review

☐ Disapproved

☐ Financial Review

☐ Ready For Approval Override

☐ Staff Review

☐ Budget Review

☐ Director Review

☐ Draft

☐ Funds Not Certified

☐ Ready To Approve

(Search filter: Disabled)

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

Workflow States ?

☐ All Status
☐ Not Started
☐ Complete

☒ Administrative Review
☐ Approved
☐ Budget Review

☐ Coordinator Review
☐ Deputy Review
☐ Director Review

☐ Disapprove Review
☐ Disapproved
☐ Draft

☐ Exception
☐ Financial Review
☐ Funds Not Certified

☐ Grants Review
☐ Ready For Approval Override
☐ Ready To Approve

☐ Research Review
☐ Staff Review

(Search filter: Disabled)

Search Close

Total Records Count: 1

Select	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
<input type="checkbox"/>	DTG2018000340 New		GS Training Center	Entire US	Federal: \$400,000.00 Non-Federal: \$0.00	Administrative Review Federal: \$400,000.00 Non-Federal: \$0.00 Next Workflow Actions		History View View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Business Review Concur Disapprove Reject

Concur Non Concur Reject

*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**.

Action Requested: Concur

Application Number Application Type	Grant Number	Applicant/Grantee
DTG2018000340 New		GS Training Center

Comments

OK

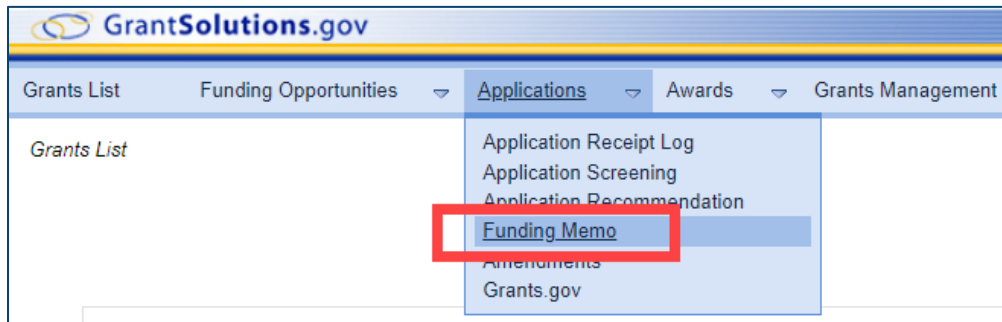
Cancel

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**.

Funding Memo

Application Type ?

- Please select an Application Type - ▾

Announcement ?

- Please select an Announcement - ▾

Funding Opportunity #

- Please select a Funding Opportunity # - ▾

Grant Program ?

- Please select a Grant Program - ▾

Application Number ?

DTG2018000340

Grant Number ?

Assignment Options

☐ Only Display Memos for Primary Assignments

Display Options

☐ Only Display Memos for Projects Assigned to Me

Workflow States ?

☐ All Status
 ☐ Not Started
 ☐ Complete

☒ Administrative Review
 ☐ Approved
 ☐ Budget Review
 ☐ Coordinator Review
 ☐ Deputy Review
 ☐ Director Review
 ☐ Disapprove Review
 ☐ Disapproved
 ☐ Draft
 ☐ Exception
 ☐ Financial Review
 ☐ Funds Not Certified
 ☐ Grants Review
 ☐ Ready For Approval Override
 ☐ Ready To Approve
 ☐ Research Review
 ☐ Staff Review

[\(Search filter: Disabled\)](#)

Search

Close

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

Workflow States ?

☐ All Status
☐ Not Started
☐ Complete

☒ Administrative Review
☐ Coordinator Review
☐ Disapprove Review
☐ Exception
☐ Grants Review
☐ Research Review

☐ Approved
☐ Deputy Review
☐ Disapproved
☐ Financial Review
☐ Ready For Approval Override
☐ Staff Review

☐ Budget Review
☐ Director Review
☐ Draft
☐ Funds Not Certified
☐ Ready To Approve

(Search filter: Disabled)

Search
Close

Total Records Count: 1

Select	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
<input type="checkbox"/>	DTG2018000340 New		GS Training Center	Entire US	Federal: \$400,000.00 Non-Federal: \$0.00	Administrative Review Federal: \$400,000.00 Non-Federal: \$0.00 Next Workflow Actions		History View View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Business Review Concur Non Concur Reject

Concur
Non Concur
Reject

*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**.

Application Number
Application Type

Grant Number

Applicant/Grantee

DTG2018000340
New

GS Training Center

Comments *

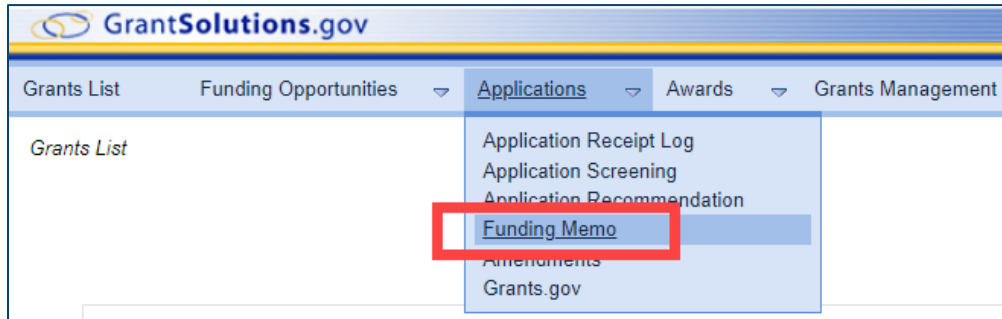
OK

Cancel

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*.

Funding Memo

Application Type ?

- Please select an Application Type - ▾

Announcement ?

- Please select an Announcement - ▾

Funding Opportunity #

- Please select a Funding Opportunity # - ▾

Grant Program ?

- Please select a Grant Program - ▾

Application Number ?

DTG2018000340

Grant Number ?

Assignment Options

☐ Only Display Memos for Primary Assignments

Display Options

☐ Only Display Memos for Projects Assigned to Me

Workflow States ?

☐ All Status
 ☐ Not Started
 ☐ Complete
 ☒ Administrative Review
 ☐ Approved
 ☐ Budget Review
 ☐ Coordinator Review
 ☐ Deputy Review
 ☐ Director Review
 ☐ Disapprove Review
 ☐ Disapproved
 ☐ Draft
 ☐ Exception
 ☐ Financial Review
 ☐ Funds Not Certified
 ☐ Grants Review
 ☐ Ready For Approval Override
 ☐ Ready To Approve
 ☐ Research Review
 ☐ Staff Review

(Search filter: Disabled)

Search

Close

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

Workflow States [?](#)

☐ All Status
☐ Not Started
☐ Complete

☒ Administrative Review
☐ Coordinator Review
☐ Disapprove Review
☐ Exception
☐ Grants Review
☐ Research Review

☐ Approved
☐ Deputy Review
☐ Disapproved
☐ Financial Review
☐ Ready For Approval Override
☐ Staff Review

☐ Budget Review
☐ Director Review
☐ Draft
☐ Funds Not Certified
☐ Ready To Approve

(Search filter: Disabled)

Total Records Count: 1

Select	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
<input type="checkbox"/>	DTG2018000340 New		GS Training Center	Entire US	Federal: \$400,000.00 Non-Federal: \$0.00	Administrative Review Federal: \$400,000.00 Non-Federal: \$0.00 Next Workflow Actions		History View View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Business Review Concur Non Concur Reject

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**.

Application Number

Application Type

DTG2018000340

New

Grant Number

Applicant/Grantee

GS Training Center

Comments *