

Quick Sheet: Funding Memo Approval – AO Role

Audience: Authorizing Official (AO) Role

PURPOSE

The purpose of this Quick Sheet is to provide instructions on how a user with the Authorizing Official (AO) role can approve, reject, or disapprove the Funding Memo.

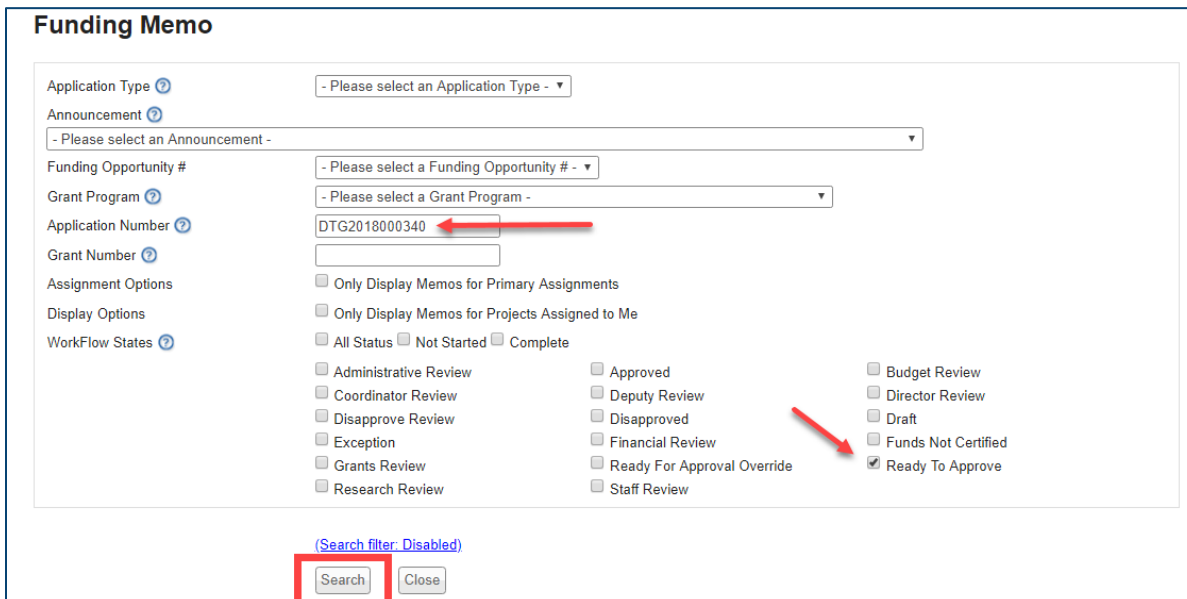
APPROVE FUNDING MEMO

When the AO is ready to indicate approval of the Funding Memo, they select the Approve 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 Ready To Approve*.





Funding Memo


Application Type 

Announcement 

Funding Opportunity #


Grant Program 

Application Number 

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 ☐ Disapproved


☐ Exception ☐ Financial Review ☐ Funds Not Certified

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

☐ Research Review ☐ Staff Review

(Search filter: Disabled)

3. The results table displays. From the *Action* column, click the **Approve** 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 <input type="checkbox"/>	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	Ready To Approve Federal: \$400,000.00 Non-Federal: \$0.00		History View View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Business Review <div style="border: 2px solid red; padding: 2px; display: inline-block;">Approve</div> Exception Reject

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

4. A transition screen appears. Click **OK**.

Action Requested: Approve

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

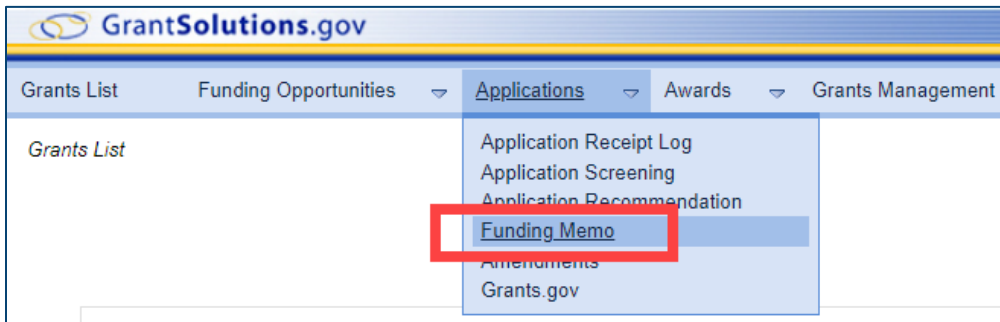
Comments

Note: Comments are optional.

REJECT FUNDING MEMO

An AO 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 Ready To Approve**.

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 ☐ 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)

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	Ready To Approve 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 Approve Disapprove 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**.

Action Requested: Reject

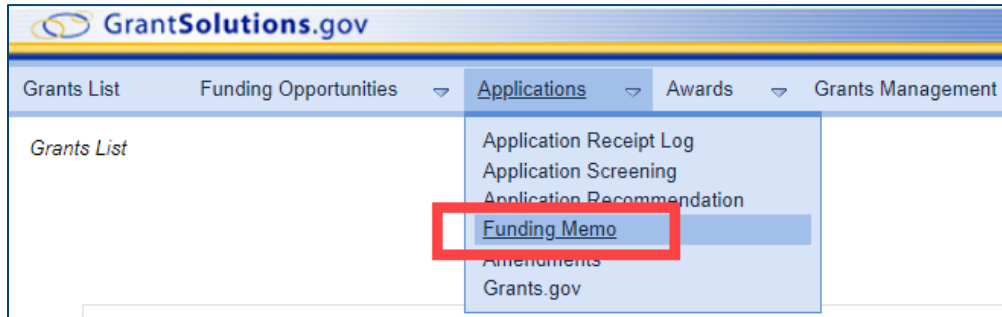
Application Number Application Type	Grant Number	Applicant/Grantee
DTG2018000340 New		GS Training Center

Comments *

DISAPPROVE

An Authorizing Official (AO) may disapprove the Funding Memo, thus stopping the Funding Memo from moving 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 Ready To Approve*.


Funding Memo

Application Type [?]

Announcement [?]

Funding Opportunity #

Grant Program [?]

Application Number [?] 

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

<input type="checkbox"/> Administrative Review	<input type="checkbox"/> Approved	<input type="checkbox"/> Budget Review
<input type="checkbox"/> Coordinator Review	<input type="checkbox"/> Deputy Review	<input type="checkbox"/> Director Review
<input type="checkbox"/> Disapprove Review	<input type="checkbox"/> Disapproved	<input type="checkbox"/> Draft
<input type="checkbox"/> Exception	<input type="checkbox"/> Financial Review	<input type="checkbox"/> Funds Not Certified
<input type="checkbox"/> Grants Review	<input type="checkbox"/> Ready For Approval Override	<input checked="" type="checkbox"/> Ready To Approve
<input type="checkbox"/> Research Review	<input type="checkbox"/> Staff Review	

(Search filter: Disabled)

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

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

Total Records Count: 1

Select <input type="checkbox"/>	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	Ready To Approve 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 Approve Disapprove Reject

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

4. A confirmation screen appears. Click **OK**.

This Application will be disapproved and transferred to the original Service Area(Entire US). Do you wish to continue?