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.
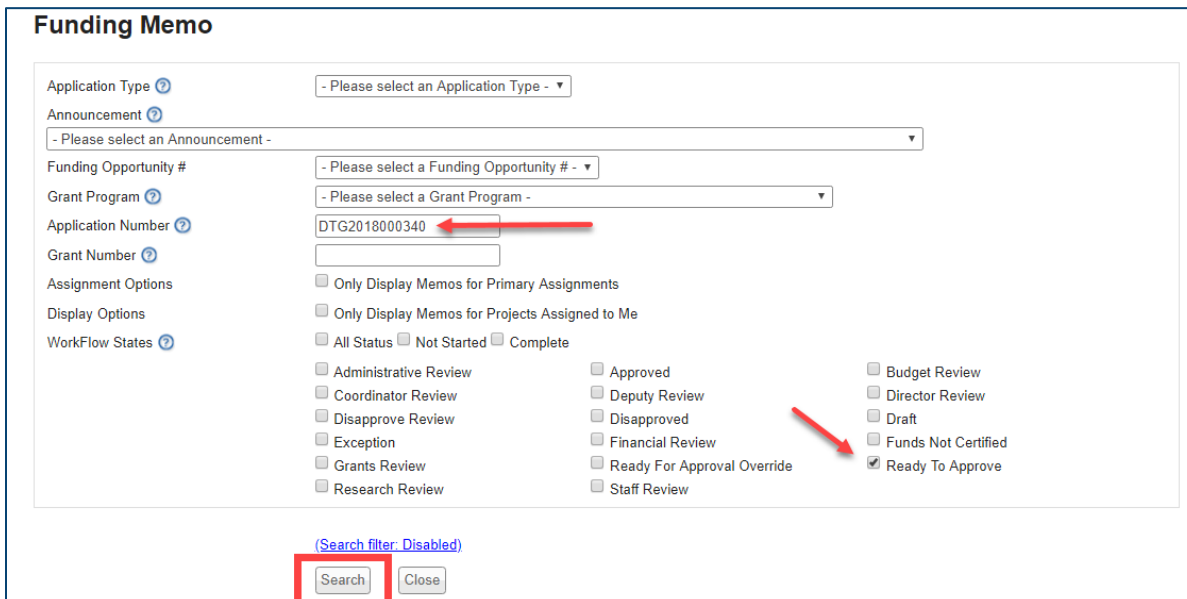
APPROVE FUNDING MEMO

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**.

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

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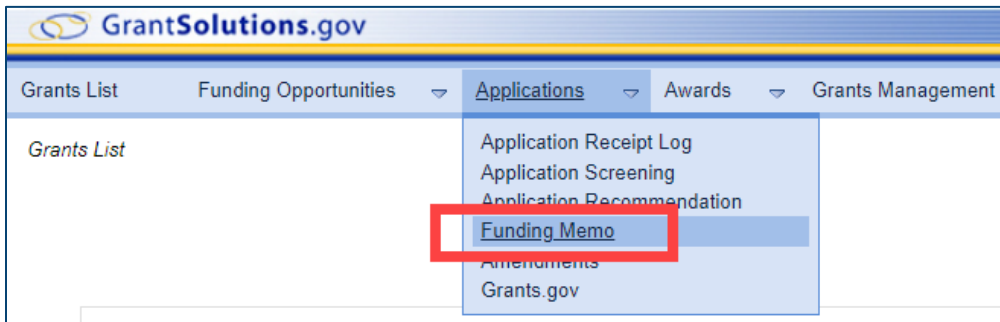
4. A transition screen appears. Click **OK**.

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***.*

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.*

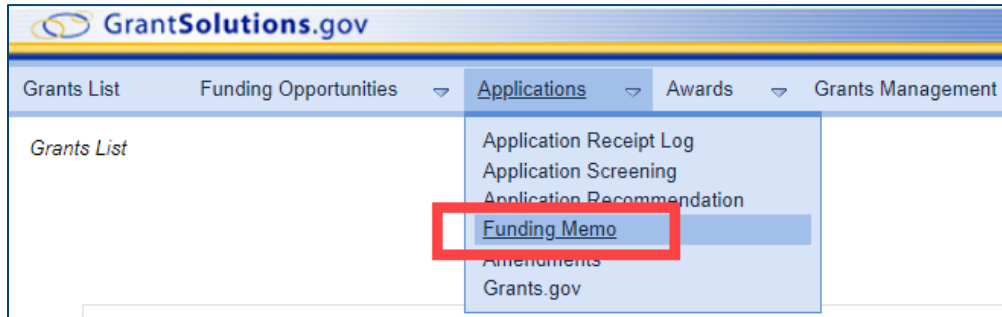4. A transition screen appears. Enter a comment (required) and then click **OK**.

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**.

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

*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**.