

## Quick Sheet: Funding Memo Approval – DAO Role

**Audience:** Deputy Authorizing Official (DAO) Role

### PURPOSE

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

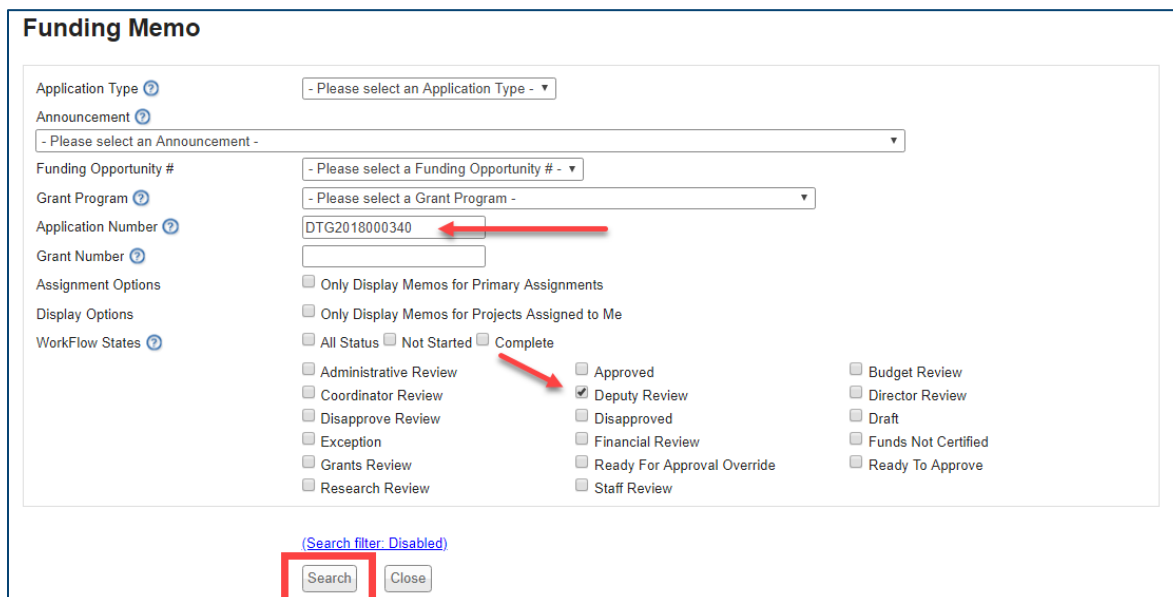
### CONCUR FUNDING MEMO

When the DAO 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 Deputy Review*.



**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 ☐ Draft

☐ 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 **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)

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	Deputy Review Federal: \$400,000.00 Non-Federal: \$0.00  <a href="#">Next Workflow Actions</a>		<a href="#">History</a> <a href="#">View</a> <a href="#">View Full Review</a> <a href="#">Application Notes</a> <a href="#">Manage Project Abstract</a> <a href="#">Project Assignments</a> <a href="#">Budget Worksheet</a> <a href="#">Business Review</a> <div>Concur</div> <a href="#">Non-Concur</a> <a href="#">Reject</a>

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

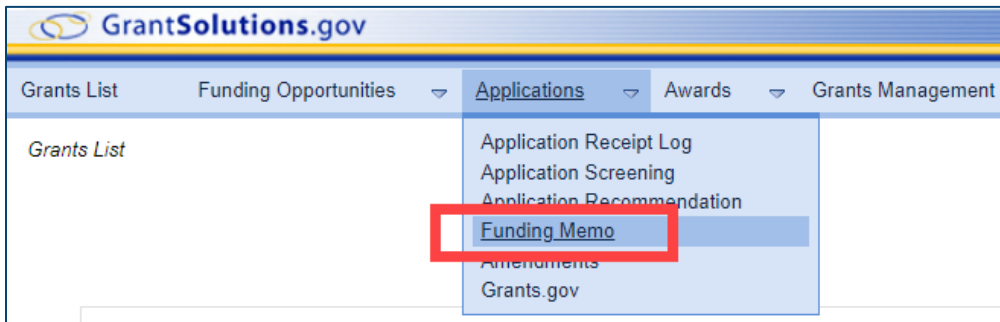
Cancel

*Note: Comments are optional.*

## REJECT FUNDING MEMO

A DAO 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 Deputy 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	Deputy Review Federal: \$400,000.00 Non-Federal: \$0.00 <a href="#">Next Workflow Actions</a>		<a href="#">History</a> <a href="#">View</a> <a href="#">View Full Review</a> <a href="#">Application Notes</a> <a href="#">Manage Project Abstract</a> <a href="#">Project Assignments</a> <a href="#">Budget Worksheet</a> <a href="#">Business Review</a>  <a href="#">Concur</a> <a href="#">Non Concur</a> <a href="#">Reject</a>

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**.

### Action Requested: Reject

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

Comments \*

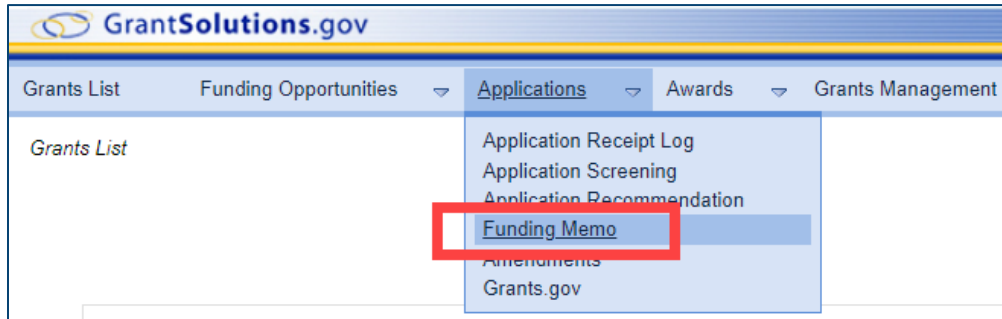
OK

Cancel

## NON CONCUR

A DAO 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 Deputy Review*.

**Funding Memo**

Application Type <sup>?</sup>

Announcement <sup>?</sup>

Funding Opportunity #

Grant Program <sup>?</sup>

Application Number <sup>?</sup>  →

Grant Number <sup>?</sup>

Assignment Options ☐ Only Display Memos for Primary Assignments

Display Options ☐ Only Display Memos for Projects Assigned to Me

Workflow States <sup>?</sup>

☐ 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)

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)

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	Deputy Review Federal: \$400,000.00 Non-Federal: \$0.00  <a href="#">Next Workflow Actions</a>		<a href="#">History View</a> <a href="#">View Full Review</a> <a href="#">Application Notes</a> <a href="#">Manage Project Abstract</a> <a href="#">Project Assignments</a> <a href="#">Budget Worksheet</a> <a href="#">Business Review</a> <a href="#">Concur</a> <a href="#">Non Concur</a> <a href="#">Reject</a>

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

DTG2018000340

Grant Number

Applicant/Grantee

GS Training Center

Application Type

New

Comments \*

OK

Cancel