

Quick Sheet: Funding Memo Approval – PBO Role

Audience: Program Budget Officer (PBO) Role

PURPOSE

The purpose of this Quick Sheet is to provide instructions on how a user with the Program Budget Officer (PBO) role can concur, non concur, or reject the Funding Memo.

CONCUR FUNDING MEMO

When the PBO 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 Budget 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
 ☐ Deputy Review
 ☐ Disapproved
 ☐ Financial Review
 ☐ Ready For Approval Override
 ☐ Staff Review

Coordinator Review

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

Disapprove Review

Exception

Grants Review

Research Review

(Search filter Disabled)

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

☐ Disapprove Review
☐ Exception
☐ Grants Review
☐ Research Review

☐ Disapproved
☐ Financial Review
☐ Ready For Approval Override
☐ Staff 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	Budget 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 <div style="border: 2px solid red; padding: 2px; display: inline-block;">Concur</div> 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

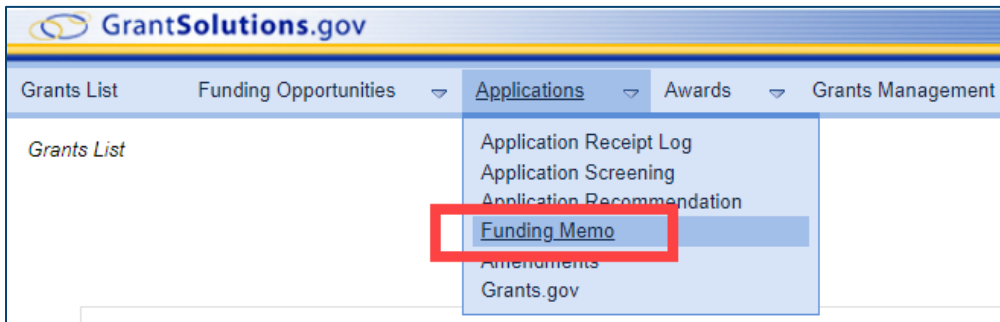
Comments

Note: Comments are optional.

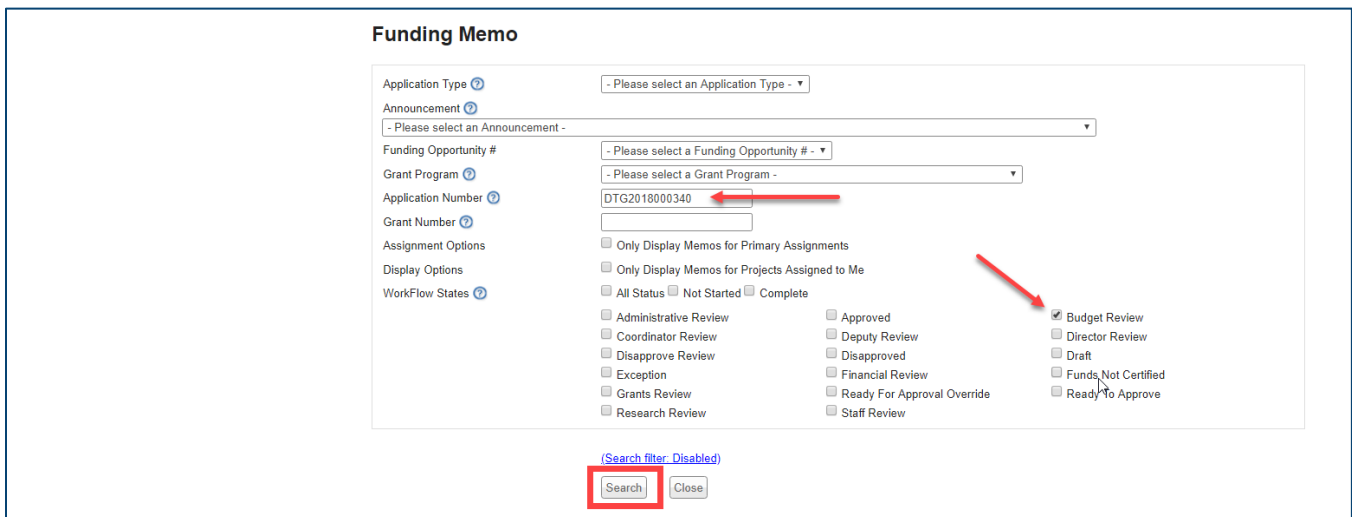
REJECT FUNDING MEMO

A PBO 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 Budget 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 ☐ 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 **Reject** link.

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

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	Budget 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**.

Action Requested: Reject

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

Comments *

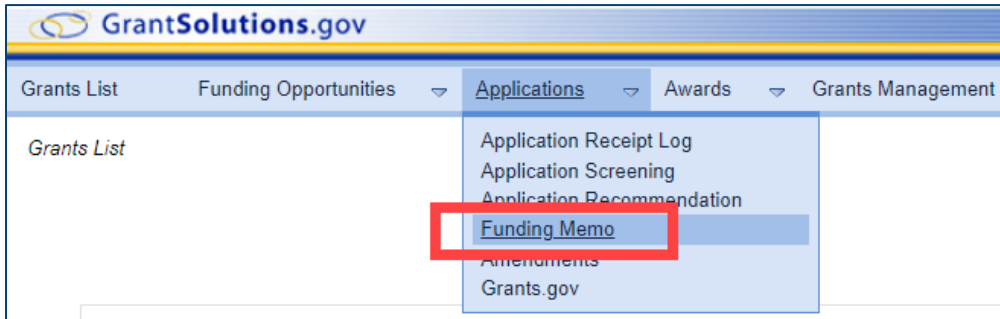
OK

Cancel

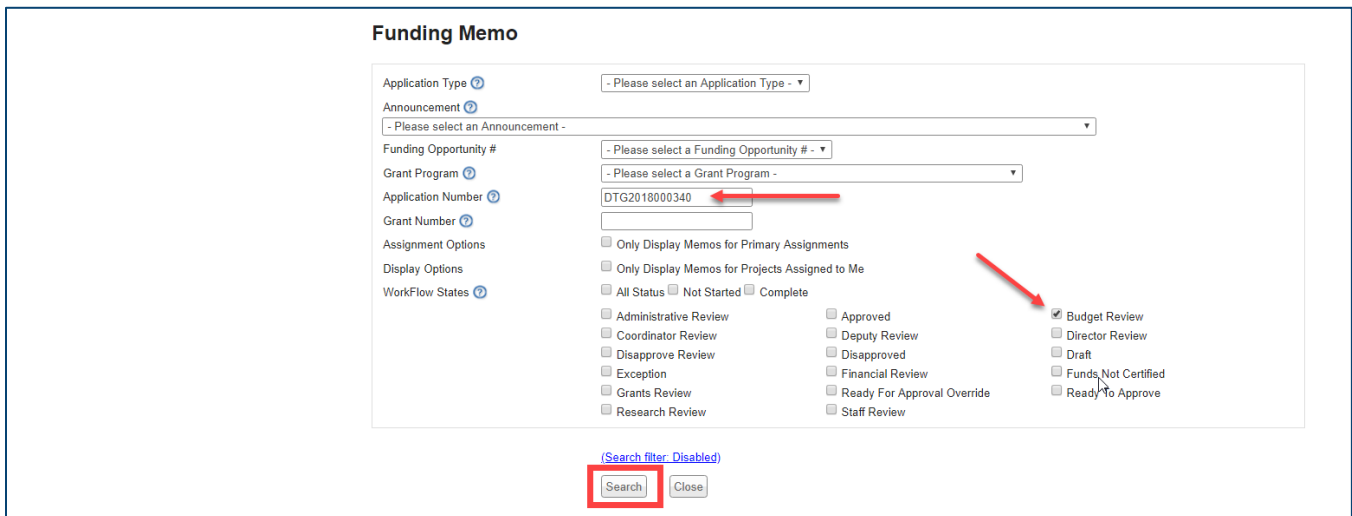
NON CONCUR

A PBO 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 Budget 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 **Non Concur** link for each individual grant.

Display Options
WorkFlow States [?](#)

☐ 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)

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	Budget 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 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 ★

OK

Cancel