

## Quick Sheet: Funding Memo Approval – PC Role

**Audience:** Program Coordinator (PC) Role

### PURPOSE

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

### CONCUR FUNDING MEMO


When the PC 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 Coordinator 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
 ☐ 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	Coordinator 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> <b>Concur</b> <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

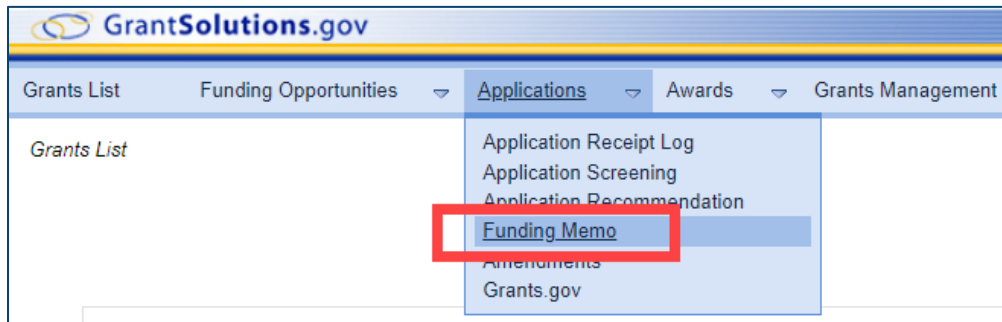
OK Cancel

*Note: Comments are optional.*

## REJECT FUNDING MEMO

A PC 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 Coordinator 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 ☐ 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	<a href="#">Application Number / Application Type</a>	<a href="#">Grant Number</a>	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
<input type="checkbox"/>	<a href="#">DTG2018000340</a> New		GS Training Center	Entire US	Federal: \$400,000.00 Non-Federal: \$0.00	Coordinator 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>

*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**

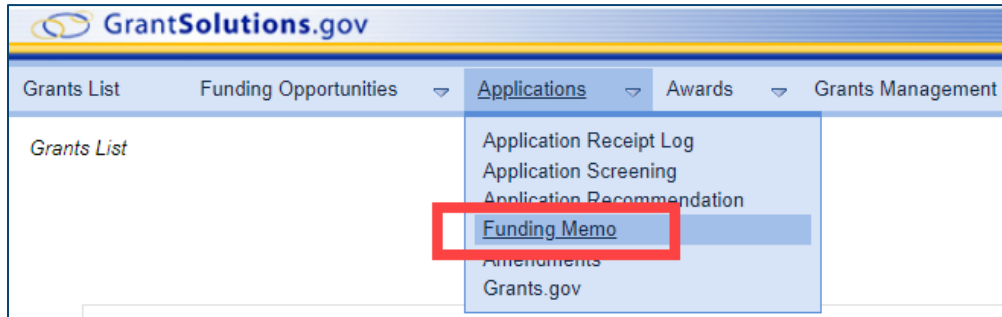
Application Number Application Type	Grant Number	Applicant/Grantee
DTG2018000340 New		GS Training Center

Comments \*

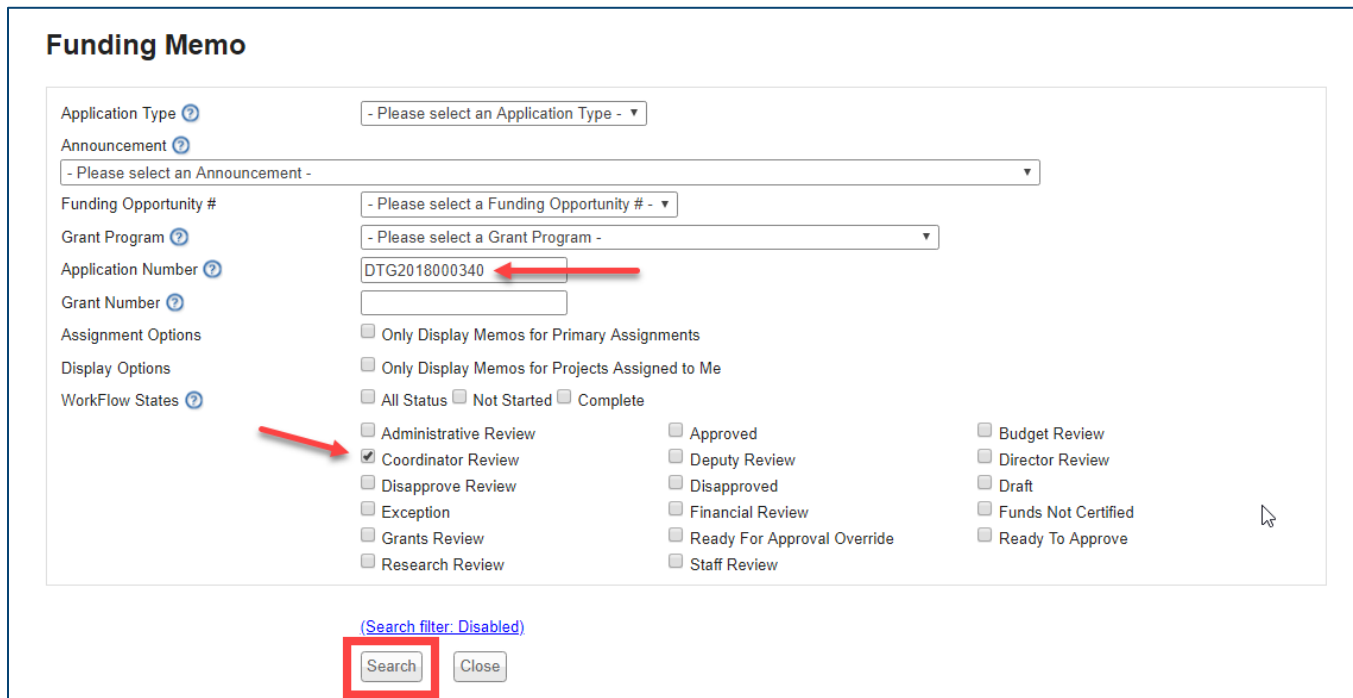
## NON CONCUR

A PC 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 Coordinator 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

Display Options

Workflow States <sup>?</sup>

☐ 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.

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"/>	<a href="#">DTG2018000340</a> New		GS Training Center	Entire US	Federal: \$400,000.00 Non-Federal: \$0.00	Coordinator 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="#">Non Concur</a> <a href="#">Reject</a>

*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**.

**Action Requested: Non Concur**

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

Comments \*