

## QUICK SHEET: FUNDING MEMO APPROVAL – AO ROLE

AUDIENCE: PROGRAM AUTHORIZING OFFICIAL (AO) ROLE

### PURPOSE

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

**Note:** For Login information and instructions, please review the GrantSolutions Login Quick Sheet.

### 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. Follow the steps below to approve the Funding Memo as the AO role:

1. From the GMM menu bar, click the **Applications** drop-down and select the **Funding Memo** option.



2. The “Funding Memo” screen appears. Choose a method to search:

a. Search for a single application by entering an **Application Number**

### 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 ?

Grant Number ?

Assignment Options

☐ Only Display Memos for Primary Assignments  
☐ Only Display Memos for Projects Assigned to Me

Display Options


☐ 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

Workflow States ?


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

b. 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 


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. Click the Search button.

### 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 ?

40

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

4. 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 click the *Approve* button at the bottom of the screen.

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"/>	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 <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>Approve</div> <a href="#">Disapprove</a> <a href="#">Reject</a>

Approve

Disapprove

Reject

- The “Action Requested: Approve” screen appears. Click the **OK** button.

**Note:** Comments are optional.

### Action Requested: Approve

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

Comments

OK

Cancel

## REJECT FUNDING MEMO

An AO may return the Funding Memo to the Program Office role that originally modified it to make edits.

- From the GMM menu bar, click the **Applications** drop-down and select the **Funding Memo** option.



2. The “Funding Memo” screen appears. Choose a method to search:

a. Search for a single application by entering an **Application Number**.

### 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 ?

Grant Number ?

Assignment Options

☐ Only Display Memos for Primary Assignments  
☐ Only Display Memos for Projects Assigned to Me

Display Options

☐ All Status
 ☐ Not Started
 ☐ Complete

Workflow States ?

☐ 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

b. 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 


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
 ☒ Ready To Approve
 ☐ Grants Review
 ☐ Ready For Approval Override
 ☐ Research Review
 ☐ Staff Review

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

3. Click the Search button.

**Funding Memo**

Application Type ?  
Announcement ?  
Funding Opportunity #  
Grant Program ?  
Application Number ?  
Grant Number ?  
Assignment Options  
Display Options  
WorkFlow States ?

- Please select an Application Type - ▼

- Please select an Announcement - ▼

- Please select a Funding Opportunity # - ▼

- Please select a Grant Program - ▼

☐ 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)


Search

Close



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

**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.

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"/>	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		<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="#">Approve</a> <a href="#">Disapprove</a> <a href="#">Reject</a>

Approve Disapprove Reject

- The “Action Requested: Reject” screen appears. Enter required **comments** in the *Comments* field and click the **OK** button.

**Action Requested: Reject**

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

Comments \*

OK Cancel

## DISAPPROVE

An Authorizing Official (AO) may disapprove the Funding Memo, thus stopping the Funding Memo from moving forward in the process.

1. From the “Grant List” screen menu bar, click the **Applications** drop-down and select the **Funding Memo** option.



2. The “Funding Memo” screen appears. Choose a method to search:
  - a. Search for a single application by entering an **Application Number**

### 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 ?

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

b. 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 ?

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
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 ☐ Financial Review
 ☐ Funds Not Certified

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

☐ Research Review
 ☐ Staff Review

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

Search

Close

3. Click the Search button.

Funding Memo screen with the Search button highlighted.

**Funding Memo**

Application Type ?  
Announcement ?  
Funding Opportunity #  
Grant Program ?  
Application Number ?  
Grant Number ?  
Assignment Options  
Display Options  
WorkFlow States ?

- Please select an Application Type - ▾

- Please select an Announcement - ▾

- Please select a Funding Opportunity # - ▾

- Please select a Grant Program - ▾

☐ 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)

Search

Close

1. 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.

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"/>	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 <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="#">Approve</a> <a href="#">Disapprove</a> <a href="#">Reject</a>

Approve
Disapprove
Reject

2. A confirmation screen appears. Click the **OK** button.

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

OK
Cancel