Request to Spend Funds – PI Approval

The RTSF process is now fully electronic. Approvals will route through workflow. Most will be initiated by the study staff, however, if you are the initiator, then please also refer to the Request to Spend Funds-Study Staff instructions found on our website (http://hsc.unm.edu/financialservices/preaward/click-era/index.html). If your study staff has initiated the RTSF, you will not have to enter any information in this step, just review and approve/disapprove. All responses will be sent from Click including your Index set-up. Let's begin:

You will receive the following notification once the RTSF has been approved by the PI:

Dear Dr. Test ,

Stacy Bigbie has initiated a Request to Spend Funds on your behalf. Please log in to here (Department Approval Sandy) to review the Request to Spend Funds information.

1. Select the RTSF – PI Approval Activity on the left hand menu.
2. Review the information carefully. If you approve, select "Yes" and click "OK" If you do not agree with the information provided, please select "No" to the certification question and the Request to Spend Funds request will return to the person who initiated it for changes.
3. After you certify the RTSF information is accurate, your Department Chair/Center Director will receive a notification to review/approve your request.
4. Once all approvals have been obtained, your Contract & Grant Accounting Fiscal Monitor will set-up your account in Banner and email your Index.

If you have any questions regarding the RTSF information, please contact your Department Assistant.

If you have any questions regarding the RTSF Electronic Process, please contact your assigned Sponsored Projects Officer (Sandy Sacher).

Thank you

The notification will ask you to log in and review/approve the request. You will be able to log in from the link in the notification.

Once logged in, you will click on "RTSF – PI Approval" Activity

A pop-up screen will appear where you will review the project information. This is all the same information that would be provided on the paper RTSF.

If all the information looks accurate, select "Yes" and "Ok" to Approve. Once you select OK, a notification will be sent to the Department Chair/Delegated Approver to log in and review/approve the project.

If any information looks inaccurate, select "No" and "Ok" and the request will be routed back to the study staff for re-work.

RTSF – PI Approval

Please Verify That All of the Information Below is Correct, and Check the Appropriate Radio Button to Indicate Approval

Proposal Information

PI Name: Steven Bradfute

Proposal Number: FP00000014

Department: Internal Medicine IM

PI's Org Code: 851H

Funding Agency: NIH / National Cancer Institute (NCI)

Project Title: Danielle Test Avocado

Current Banner Fund Number (If Applicable): 36521

Anticipated Award Information

Anticipated Project Start Date: 7/1/2015

Anticipated Project End Date: 6/30/2017

RTSF Information

Funds Start Date: 2/1/2016

Funds End Date: 3/31/2016

Funds Amount: $60,000.00

PI Justification:
MSU - Salary Allocation Purpose

* **I Certify That All Information Contained Above is True and Correct** ● Yes ◉ No   Clear

After you click "OK" the following notification will be sent to the Department Chair/Delegated Approver:

The Department Chair/Delegated Approver has 3 options:

1) To guarantee expenditure funding if the project is not received (this means the RTSF will be routed to PreAward for approval)

2) Approve the request but ask the Dean to fund expenditures if project funding is not received (this means the RTSF will be routed for Dean approval)

3) Disapprove the request (this means the project will be withdrawn from the system and the RTSF will have to be re-initiated)

Whichever decision is made, you will be notified of the action. You have now completed all tasks.

RTSF - Department Chair Review

Please Review Request to Spend Funds Below and Indicate Your Decision

Principal Investigator	Steven Bradfute
Proposal Number	FP00000014
Department	Internal Medicine IM
PI's Org Code	851H
Funding Agency	NIH / National Cancer Institute (NCI)
Project Title	Danielle Test Avocado
Type of Award	Grant to UNM
Award Cycle	Funding Submission
Fund/Index Number	36521
Anticipated Award Start Date	7/1/2015
Anticipated Award End Date	6/30/2017

Anticipated Funds:

Period Number	Start Date	Requested Amount
View 2	7/1/2016	$150,000.00
View 1	7/1/2015	$75,000.00

Requested Funds Start Date	2/1/2016
Requested Funds End Date	3/31/2016
Requested Funds Amount	$60,000.00
Admin Contact Name	Marisa Sanchez
Admin Contact Email	marsanchez@salud.unm.edu
PI Justification	MSU - Salary Allocation Purpose

Department Chair Decision:

● View In the event that the award above is not received, or does not coincide with the period of performance identified above, I will provide funding for any losses incurred as a consequence of the approval of this request

○ View I am unable to provide funding for losses incurred as a consequence of the approval of this request. However, I endorse the request and recommend its approval by the Dean.

○ View Request to Spend Funds is Disapproved

Clear