

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

The screenshot displays the UNM Electronic Research Administration interface. The top navigation bar includes 'Home', 'Grants', and 'Reports'. Below this, the breadcrumb trail shows 'Grants > Danielle Test Avocado'. The main header for the user is 'Danielle Test Avocado'. On the left, a sidebar menu lists various activities, with 'RTSF - PI Approval' highlighted in yellow. A red arrow points from the text 'Once logged in, you will click on "RTSF – PI Approval" Activity' to this menu item. The main content area shows the 'Current State' as 'Draft' and includes tabs for 'Project Information', 'Review Status', and 'SPO Additional Documents'. Below these are sections for 'PROPOSAL INFORMATION' and 'BUDGET TOTALS'.

PROPOSAL INFORMATION		BUDGET TOTALS	
PD/PI:	Steven Bradfute	Starting Date:	7/1/2015
Submitting Department/Division:	Internal Medicine IM	Number of Periods:	2
Specialist:	Kayla Hammond	Current Period:	1
Sponsors:	NIH / National Cancer Institute (NCI)	Total Direct:	\$150,000.00
SF-424:		Total Indirect:	\$75,000.00
Banner Fund #:	36521	Total:	\$225,000.00
Sponsor Award #:			

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:

Dear Department Chair,

[Steven Bradfute](#) has approved a Request to Spend Funds. Please log in to here ([Danielle Test Avocado](#)) to review/approve the Request to Spend Funds.

1. Select the RTSF – Department Chair Review Activity on the left hand menu.
2. Review the information carefully. You will have three options to choose from:
 1. 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. **(This selection will send the request to the HSC Sponsored Projects / PreAward Office)**
 2. 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. **(this selection will send the request to the Dean for approval)**
 3. Request to Spend Funds is Disapproved. **(This request will withdraw the RTSF)**
3. After making your selection, the RTSF will be routed accordingly.

If you have any questions regarding the RTSF information, please contact the Principal Investigator ([Steven Bradfute](#)).

If you have any questions regarding the RTSF Electronic Process, please contact your assigned Sponsored Projects Officer ([Kayla Hammond](#)).

Thank you

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](#)