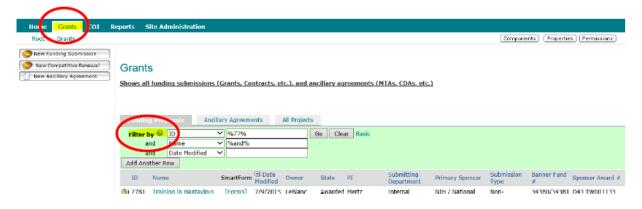
Request to Spend Funds – Study Staff

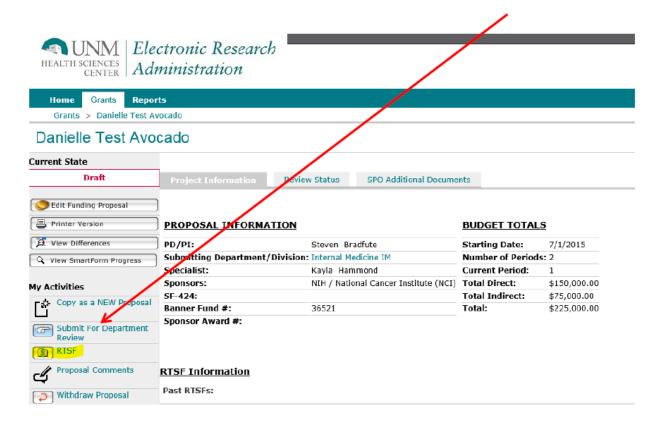
The RTSF process is now fully electronic. Approvals will route through Click workflow as identified by you but preapproved by your Chair or Department Administrator. You will only have to enter minimal information in order to process your RTSF. All responses will be sent from Click including your Index set-up. Let's begin:

Just as in the current process, you must first have an open record in Click. This means a record that is in one of the following states Draft, Department Review, SPO Review, Final SPO Review, Pending Sponsor Review, Prepare for Award, or Award QC. Note: If you are processing a No-Cost Extension RTSF, you will find your current Awarded record.

If you don't have an open non-awarded record, you will create on in order to initiate the RTSF process. To look for your current record, log in to Click and click on the "Grants" Tab and query by the information you have:



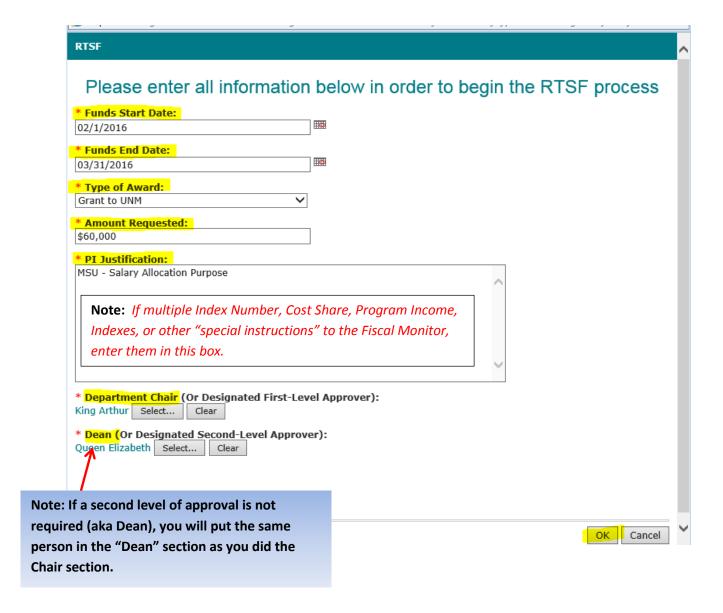
After you find your open record or create a record for your RTSF, you will click on the "RTSF" Activity:



A pop-up screen will appear where you will enter the project information:

- 1) Funds Start Date: This is the anticipated date the funds will start
- 2) Funds End Date: This is the anticipated end date that you will require the stated funds
- 3) Type of Award: This indicates whether it is a grant or type of contract
- 4) Amount Requested: This is the estimated amount you will require during the period stated
- 5) PI Justification: This is the reason for the RTSF Request if a MSU or NCE you will indicate that here
- 6) Department Chair (or Designated First Level Approver): You will enter the first level approver here. Some Departments have delegated the Chair authority to the Department Administrator this decision will be up to your Chair. Please keep in mind, the person indicated here will need to log in and approve the RTSF after the PI Approves.
- 7) <u>DEAN (or Designated Second Level Approver):</u> You will enter your Dean in this section. If the Chair Approves but doesn't have the funding, the decision will move to the next level of approval, which is the Dean. In most cases, the approval does not reach this point.

Note: In rare cases, your Chair & Dean may be the same person.



Once you have completed the information, click "ok" – this will send the PI a notification to log in and approve the request – notification below:

Dear Dr. Bradfute,

Marisa Sanchez has initiated a Request to Spend Funds on your behalf. Please log in to here (Danielle Test Avocado) 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 (Kayla Hammond).

Thank you

At this point, your part of the process is complete.