

Request to Spend Funds – Study Staff

The RTSF process is now fully electronic. Approvals will route through Click workflow as identified by you but pre-approved 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 one 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:

Home **Grants** COI Reports Site Administration

Root Grants Components Properties Permissions

New Funding Submission
New Competitive Renewal
New Ancillary Agreement

Grants

Shows all funding submissions (Grants, Contracts, etc.) and ancillary agreements (MTAs, CDAs, etc.)

Filtering Protocols Ancillary Agreements All Projects

Filter by ID %77% Go Clear Basic
and Name %and%
and Date Modified %and%

Add Another Row

ID	Name	SmartForm	Date Modified	Owner	State	PI	Submitting Department	Primary Sponsor	Submission Type	Banner Fund #	Sponsor Award #
7781	Training in Hantavirus	[Forms]	7/9/2015	LEHARR	Awarded Ment	Internal	Internal	NIH / National	Non-	34380/14381	DA3 TW001177

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

UNM HEALTH SCIENCES CENTER | Electronic Research Administration

Home **Grants** Reports
Grants > Danielle Test Avocado

Danielle Test Avocado

Current State: **Draft**

Project Information | Review Status | SPO Additional Documents

Edit Funding Proposal
Printer Version
View Differences
View SmartForm Progress

My Activities

- Copy as a NEW Proposal
- Submit For Department Review
- RTSF**
- Proposal Comments
- Withdraw Proposal

PROPOSAL INFORMATION

PD/PI: Steven Bradfute
Submitting Department/Division: Internal Medicine IM
Specialist: Kayla Hammond
Sponsors: NIH / National Cancer Institute (NCI)
SF-424:
Banner Fund #: 36521
Sponsor Award #:

BUDGET TOTALS

Starting Date: 7/1/2015
Number of Periods: 2
Current Period: 1
Total Direct: \$150,000.00
Total Indirect: \$75,000.00
Total: \$225,000.00

RTSF Information

Past RTSFs:

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) **DEAN (or Designated Second Level Approver):** 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.

RTSF

Please enter all information below in order to begin the RTSF process

* **Funds Start Date:**
02/1/2016

* **Funds End Date:**
03/31/2016

* **Type of Award:**
Grant to UNM

* **Amount Requested:**
\$60,000

* **PI Justification:**
MSU - Salary Allocation Purpose

Note: *If multiple Index Number, Cost Share, Program Income, Indexes, or other "special instructions" to the Fiscal Monitor, enter them in this box.*

* **Department Chair (Or Designated First-Level Approver):**
King Arthur [Select...] [Clear]

* **Dean (Or Designated Second-Level Approver):**
Queen Elizabeth [Select...] [Clear]

OK Cancel

Note: If a second level of approval is not required (aka Dean), you will put the same person in the "Dean" section as you did the Chair section.

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 ([Kavla Hammond](#)).

Thank you

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