How to Approve an Award

Once an Opportunity Administrator has completed the task of selecting applicants, the Budget Approver is now required to approve the disbursements. The applicants chosen will be in the Ready for Approval category and Budget Approvers should have been notified by the Opportunity Administrator once their task was complete. Alternatively, you can create a dashboard card and login periodically to review any tasks in your queue. Please see the job aid on our website for more information on how to create a dashboard card. Budget Approvers must verify cash is available and can be used for the awards proposed and approve those students in the Ready for Approval category by moving them to the Budget Approved category.

If you are not utilizing the dashboard card feature, the quickest way to complete your task is to login and go directly to your dashboard. You can also access it from any screen by clicking on the Award Management button in the top-left corner. Once there, scroll to the very bottom until you see the following screen with Application Counts by Category. By default there are 4 subsections, but the Post-Acceptance and Renewal sections have been hidden for the purposes of this tutorial. Click on “Show More Categories” at the bottom of that section.
Review the “Ready for Approval” categories in both sections for how many applicants require approval. Click anywhere in that section to be sent to the applicant grid.

Filter the applications grid by selecting the drop down menu under “Category” and then select “Ready for Approval”. You will do this for both Auto-match and Apply-to applications.

Review the Fund Code, Portfolio Name, Award Period, Amount Offered and any other columns relevant to your decision making process. Subtotal the amount for each Fund Code to calculate how much is being requested and validate it against the available cash from one of your OMNI available balance reports.

You can also customize this view, save it and/or add it as a Dashboard Card by using the icons in the top-left corner of the grid.
Select the checkbox next to the applicant you are ready to categorize, or select the check box in the top-left corner to select all.

Scroll to the bottom of the page and click on “Act on Selected”. Select “Categorize” from the drop down menu.

A Categorize Selected box will appear. Change the “Choose a Category” to “Budget Approved” and click “Categorize”. The amount and term should be blank to indicate no changes.

You can also choose “Budget Pending” if you need to put the applicant into a holding category for discussion with the Opportunity Administrator. You can return to it later and choose “Budget Approved” then.

You may update the amount or term at this time as well; however, if you do so, this will affect every applicant selected, which is important to note if you clicked on the select-all box earlier in the tutorial.
This will send the applicant to Foundation Accounting for validation against the fund criteria. If approved, the applicant will be categorized as “Offered” and be sent an email notification to accept.