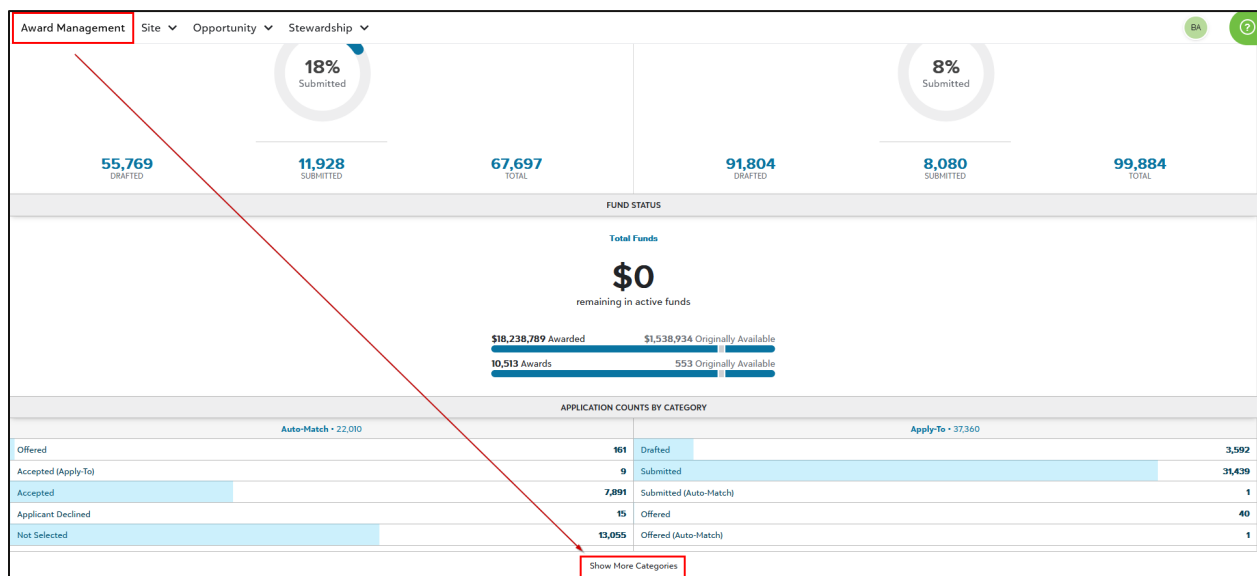


## How to Approve an Award

Once an Opportunity Administrator has completed the task of selecting recipients, the Budget Approver is now required to approve the disbursements. The selected recipients 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. For assistance in adding your own dashboard cards, please see the [How to Create a Dashboard Card](#) job aid on our website. Budget Approvers must verify cash is available to cover the entirety of the award(s) and that qualifications of the intended recipients meet the restrictions of the appropriate Foundation fund. These awards are then moved from the **Ready for Approval** category to the **Budget Approved** category. This job aid covers the process to accomplish that task.

The quickest way to complete your task is to login and go directly to your dashboard. You can access the dashboard from anywhere in FS4U it from any screen by clicking on the Award Management text in the top-left corner of the website. From the dashboard, 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 to expand the selection to show all categories.



Review the **Ready for Approval** categories in both the Auto-Match and Apply-To sections for a complete listing of all awards requiring budget approval. Clicking anywhere in the respective sections will direct you to an unfiltered grid view of the Auto-Match or Apply-To applications. This will include all categories of encumbered applications.

APPLICATION COUNTS BY CATEGORY			
Auto-Match • 22,010		Apply-To • 37,360	
Offered	161	Drafted	3,592
Accepted (Apply-To)	9	Submitted	31,439
Accepted	7,891	Submitted (Auto-Match)	1
Applicant Declined	15	Offered	40
Not Selected	13,055	Offered (Auto-Match)	1
Budget Approved	4	Accepted	1,696
Budget Pending	49	Accepted (Auto-Match)	100
Validation Pending	1	Applicant Declined	2
Ready for Approval	182	Enrollment Pending	18
Enrollment Pending	324	Budget Pending	1
Foundation Declined	319	Ready for Approval	60
Defunct Category	0	Validation Pending	1

From the grid view, you can filter the applications by selecting the drop-down menu under the *Category* column and then select **Ready for Approval**. This works identically in the Auto-match and Apply-to queues.

Complete View											
1-50 of 34335		Page 1									
View	Award Mode	ID	Category	Category...	Qualifica...	Name	Primary Email	Email Aliases	UID	Award Per	
<input type="checkbox"/>			All							All	
<input type="checkbox"/>	View	Award Mode	1...	System	24	1					Summer 20
<input type="checkbox"/>	View	Award Mode	1...	Submitted	24	1					Fall 2024/S
<input type="checkbox"/>	View	Award Mode	1...	Offered	24	1					Fall 2024/S
<input type="checkbox"/>	View	Award Mode	1...	Accepted	24	1					Fall 2024/S
<input type="checkbox"/>	View	Award Mode	1...	Drafted	24	1					Fall 2024/S
<input type="checkbox"/>	View	Award Mode	1...	Applicant Declined	24	1					Fall 2024/S
<input type="checkbox"/>	View	Award Mode	1...	Drafted (Apply-To)	24	0					Summer 20
<input type="checkbox"/>	View	Award Mode	1...	Accepted (Apply-To)	24	1					Fall 2024/S
<input type="checkbox"/>	View	Award Mode	1...	Custom	24	1					Fall 2024/S
<input type="checkbox"/>	View	Award Mode	1...	Not Selected	24	1					Fall 2024/S
<input type="checkbox"/>	View	Award Mode	1...	Budget Approved	24	1					Fall 2024/S
<input type="checkbox"/>	View	Award Mode	1...	Budget Pending	24	1					Fall 2024
<input type="checkbox"/>	View	Award Mode	1...	Validation Pending	24	1					Fall 2024
<input type="checkbox"/>	View	Award Mode	1...	Ready for Approval	24	1					
<input type="checkbox"/>	View	Award Mode	1...	Enrollment Pending	24	1					
<input type="checkbox"/>	View	Award Mode	1...	Foundation Declined	24	1					Fall 2024/S

Review the *Fund Code*, *Portfolio Name*, *Award Period*, *Amount Offered*, and any other columns relevant to your decision-making process. By default, awards will be sorted by *Fund Code*, then *ID* (unique award identifier) to allow you to more easily subtotal the amount for each *Fund Code* to calculate how much is being requested to validate against the available cash from one of your OMNI available balance reports.

Dashboard Card										
1-50 of 182	Page 1									
<input type="checkbox"/>	View	ID	Category	Categorized At	Fund Code ▲	Portfolio Name	Award Period	Amount Offered	UID	Name
<input type="checkbox"/>	View	1...	Ready for Appr...	04/10/2024	F00187	Department of R...	Spring 2024	\$2,000.00		
<input type="checkbox"/>	View	1...	Ready for Appr...	07/01/2024	F00352	Evelyn R. & John...	Summer 2024	\$260.00		
<input type="checkbox"/>	View	1...	Ready for Appr...	07/01/2024	F00352	Evelyn R. & John...	Summer 2024	\$260.00		
<input type="checkbox"/>	View	1...	Ready for Appr...	04/11/2024	F00933	Davis H. A. Stud...	Fall 2024	\$1,000.00		
<input type="checkbox"/>	View	1...	Ready for Appr...	04/11/2024	F00942	James Bruce W...	Fall 2024	\$1,000.00		

You can 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. This is detailed in the aforementioned [How to Create a Dashboard Card](#) job aid as well as [How to Use the Grid System](#).

Once you are ready to budget approve an award, you will select the checkbox next to the appropriate applicant(s), or if you intend to approve all awards listed, you can select the check box in the top-left corner of the grid to "Select All".

At the bottom-left of the grid is a dropdown menu that now reads **Act on Selected**. Click on that and select **Categorize** from the drop-down menu.

<input checked="" type="checkbox"/>	View	1...	Ready for Appr...	04/16/2024	F00990	Dedman Colleg...	Fall 2024	\$1,000.00		
<input type="checkbox"/>	View	1...	Ready for Appr...	04/16/2024	F00990	Dedman Colleg...	Fall 2024	\$1,500.00		
<input type="checkbox"/>	View	1...	Ready for Appr...	04/16/2024	F00990	Dedman Colleg...	Fall 2024	\$1,000.00		
<input type="checkbox"/>	View	1...	Ready for Appr...	04/16/2024	F00990	Dedman Colleg...	Fall 2024	\$1,500.00		
<input type="checkbox"/>	View	1...	Ready for Appr...	05/21/2024	F01008	Herb Morgan Pr...	Fall 2024/Spri...	\$1,000.00		

You should now see an overlaid box titled **Categorize Selected**. Change the **Choose a Category** dropdown to **Budget Approved** and click **Categorize**. The Update Amount and Award Period fields should be left blank if you intend to approve the award(s) as-is. Please note that if you make selections for either of these fields, all awards that you have selected will be overwritten with the chosen value(s). This is important to note if you clicked on the “Select All” box earlier in the tutorial.

Categorize Selected

Choose a Category

Budget Approved

Update Amount

Encumber per applicant

Award Period

Choose an Award Period

Categorize

Once you have clicked **Categorize**, this will send the award to Foundation Accounting for additional validation of available cash, donor intent, and student enrollment in the appropriate Award Period(s). If approved, the applicant will be categorized as **Offered** and be sent an email notification to accept.