

G&P SSA Fiscal Agent Management - Approve Grant Requests

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This guide covers the necessary steps to assist SSA fiscal agents in approving grant requests submitted from the Grant Maintenance page in Grants and Projects or submitted by member LEAs via the MemberPortal.

If the Document Attachments feature exists on a page/pop-up window, depending on your access, you may have the ability to upload or view supporting documentation by clicking the **Documents** button or the paper icon.

Some of the images and examples provided in this document are for informational purposes and may not completely represent your LEA's process.

This guide assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.

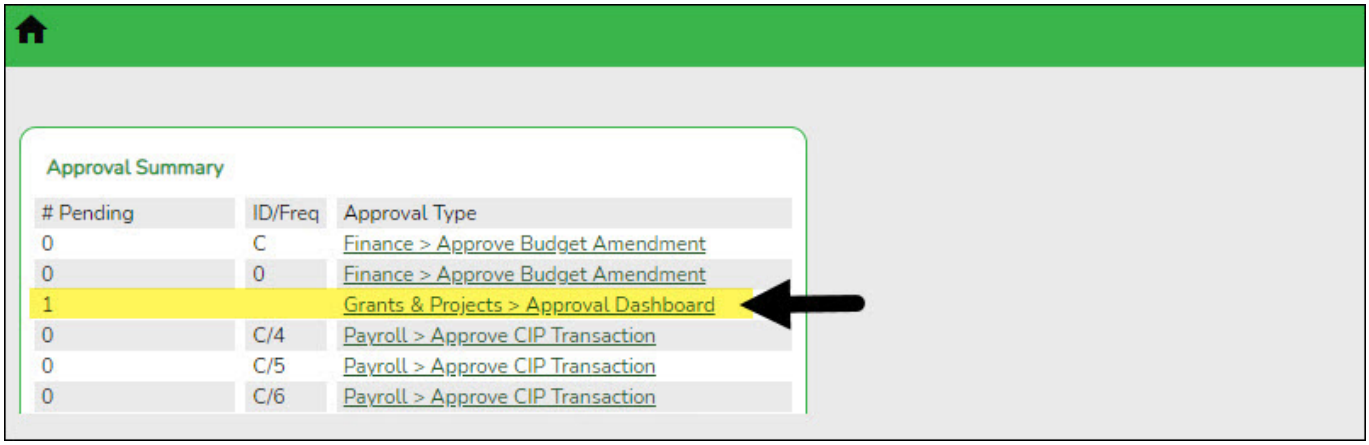
Prerequisites

❑ Review the SSA Fiscal Management Setup guide.

Approve Grant Requests

The following steps allow fiscal agents to review submitted grant requests and determine eligibility for approval as outlined in the grant.

If you are an approver, you will see the number of requests pending your approval under **Approval Summary** on the ASCENDER homepage. Click the link to go directly to the Grants and Projects Approval Dashboard to take action on the pending request(s).



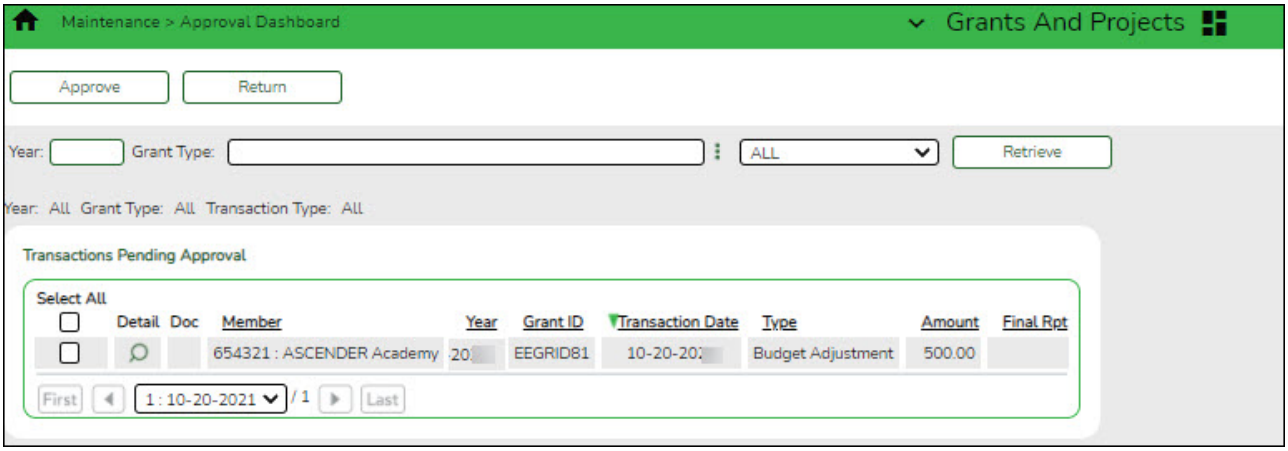
1. Approve grant requests.

Approve grant requests

Grants and Projects > Maintenance > Approval Dashboard

Upon retrieving the page, a list of all budget adjustment, budget revision, and reimbursement requests awaiting your approval is displayed regardless of the year and grant type.

You can elect to approve all requests, individual requests, or return all requests or individual requests. Additionally, you can update the details for an individual request prior to approving or returning the request. And, if you have Document Attachment permission, the **Documents** button is displayed allowing you to view/upload documents.



Use the following fields to narrow your search of pending approvals:

Year	Type a four-digit grant year.
Grant Type	Begin typing the grant type or description. As you type the data, a drop-down list of corresponding data is displayed. Select a grant. If the grant type or description is not known, click ⋮ to select a grant from the Grant Types lookup or press the Spacebar to view a list of grant types.

❑ Click ⌄ to select the request type (*ALL*, *Budget Adj & Rev*, *Reimbursement*).

❑ Click **Retrieve**. A list of pending requests matching your search criteria is displayed if any.

Under **Transactions Pending Approval**:

❑ Select the top-level check box to select/unselect all transactions. Or, select individual check boxes to only select specific transactions.

Detail	Click ⌕ to view the corresponding details for the transaction and any documents attached to the transaction (if applicable). You can edit, save, and submit budget adjustment requests, budget revision requests, and reimbursement requests. Depending on the transaction type and status, either the Budget Adjustment Request, Budget Revision Request, or the Reimbursement Request pop-up window opens. **Note**: After the final transaction is submitted for a grant year and ID, no other requests can be submitted.

Doc	If documents exist for the transaction,  is displayed. Click to open the Document Attachments pop-up and view the existing uploaded documents. The Document Attachments feature in this view is read-only.
Member	The member county district number and name tied to the transaction are displayed.
Year	The grant year for the transaction is displayed.
Grant ID	The grant ID for the transaction is displayed.
Transaction Date	The transaction date is displayed.
Type	The transaction type is displayed.
Amount	The transaction amount is displayed. This amount includes the sum of all object class amounts for the grant year and ID.
Final Rpt	For reimbursement requests only: If selected, the originator has indicated that the request is the final transaction for the grant year and ID. This field is display-only.

❑ Click **Approve** to approve the request.

- If there are subsequent approvers in the workflow, the transaction will continue to the next approver.
- If you are the last approver in the approval workflow and you approve the transaction, a final approval message is displayed, click **OK**. The transaction status is updated to *Posted* on the Grant Maintenance tab.
- If **Final Report** is selected for a reimbursement request, the **Final Report Processed Indicator** is automatically selected for the **Grant Year** and **Grant ID** on the Grant Maintenance tab.
- The approved requests are removed from the list.

❑ Click **Return** to return the request to the originator. The returned requests are removed from the list.