Budget Upload - CGA Analyst Review

1. Grants WorkCenter. Depending on the purpose of the budget RAs selected, the budget will go into different queues.

2. Since our example is a budget for new award, then the budget will be in the ‘Department Budget for New Awards’ queue. Click on the award number.
3. Once the award number is clicked, the budget accept/reject page will become available. It is the same page CGA analysts have been using.
4. Optional: CGA analysts can click on ‘Related Content’ to open the award funding page. This may be useful when CGA analysts have an award modification or budget reallocation where there are existing budget rows on the budget page.
5. Once the page is opened, first click on 'Funding' tab and then 'budget period' icon.
6. For a new award, the CGA analyst will come to this page and complete the rest of the budget information, such as Fund Code, Department, Program Code, and Amount. Once these fields have been populated, click the ‘Save’ button.

7. Before the CGA analyst clicks on the ‘Approve’ button, be sure to verify that all projects are mapped correctly. If all projects have been mapped properly and once the CGA analyst has determined that the budget is correct, click on the ‘Approve’ button. Once the ‘Approve’ button has been selected, the budget will be routed to the appropriate CGA supervisor for their approval. **NOTE** All PC Mapping will still need to be done by the CGA Analyst. There is not a process in place that automates this business process at this time.**
8. If the budget is incorrect, click on ‘Reject’ button. This action will send the budget back to the department for the RA to review, edit/correct and resubmit. The CGA analyst can also add rejection comments and select multiple reasons.

9. Once the department has corrected the budget and resubmitted, simply click on the ‘Accept’ button to send the budget to the appropriate CGA supervisor for approval.

NOTES:

- For Award Mods, CGA will no longer need to add a line on the budget page in order to load budget.
- For Training Grants or Multi funds awards, CGA will no longer need to change fund codes on the award attribute page.
- CGA analysts cannot change the budget. CGA can send the budget back to the department to add and edit, but cannot change the budget amount or any chartfield values.
- The department RAs have the option to use an excel spreadsheet to load the budget, but CGA will not have the access to load budget via excel.
- For Award Mods, CGA analysts will still need to approve the award mod on the WorkCenter. This portion is to approve and load budgets only.