

Processing Applications in UFunds

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When an application is submitted, it will be listed for approvers under **Approve > Applications**. To act on a given application, click the Edit link next to it. This will display the application form and a number of additional details. Some relevant sections to pay attention to are:

Supplemental Files: You may use this as a place to store files related to the application or review process. If you check the box in the "Compile" column, then the document will be included in the compiled application PDF that UFunds generates.

Decision and Funding: Specific details in this section may vary depending on the grant period's workflow and specific settings. Fields you may see include:

- **Approved Amount:** If your grant period has a financial component and you are approving the application, you will put the amount to give the applicant here.
If you have any questions about what to put in the fields below, contact the grant period's financial administrator.
- **Source Account Split :** Once you have recorded an amount above, a single row will automatically be populated here. If the award is coming from a single account, just make sure the account number here is correct. If you want to take a portion of the award from multiple accounts, click the Add Account button and set the account numbers and amounts as appropriate. UFunds will require that the total from all accounts equals the total approved amount.
- **Payment Method :** Students will normally be paid either by check or cash, while faculty payments will be by account transfer.
- **Delivery Method :** You will only see this if the payment method is "check" above. Use this to indicate to your Financial Administrator who will be picking up the check and how it should be delivered.
- **Mailing Address :** You will only see this if the payment method is "check" and the delivery method is "mail to recipient."
- **Okay to Pay :** Contact your financial administrator to see whether or how you should use this field.
- **Comments :** The comments field is strictly for the approver's own use. Anything entered here should only be visible on this screen.
- **Status/Response :** This is where you will update the status of the application. As described in "The Default UFunds Workflow," there are more statuses here than what have meaning for UFunds. The key statuses are "Revisions Requested," "Approved,"

and “Not Selected.” The first of these kicks the application back to the applicant for further changes, and the latter two are end states for the application. Once an application is set to one of these statuses, no further action can be taken on it.

- **Visibility :** By default, all applications submitted in UFunds are visible to approvers in the “Applicant History” section of the approve screen. If you do not want this application to be seen by other UFunds users, then select this option.