

How to Submit a Prior Approval Request

Division of Early Learning Finance and Accounting Portal

240.05 Attachment I



DIVISION OF
Early Learning

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How to Submit a Prior Approval Request

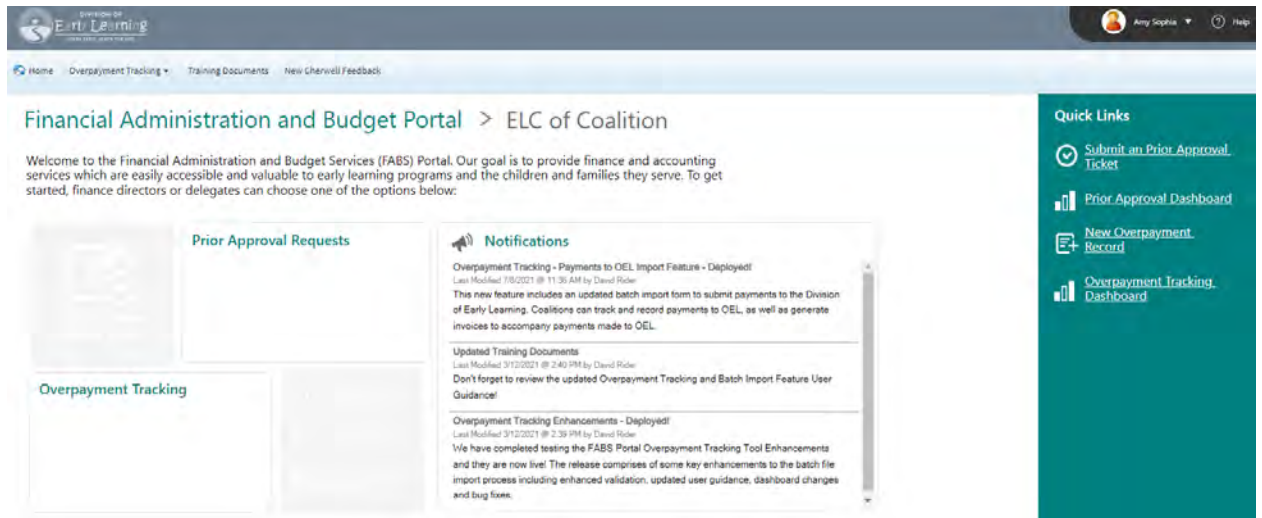
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How to Submit a Prior Approval Request

1. Creating a New Prior Approval Request



1.1.

From the Financial Administration and Budget Portal main page, click on the “Report a Prior Approval Request” link.

1.2. An FA Ticket template will appear on the screen containing a Prior Approval Request Form.

- The contact information of the end user who is logged into the Finance and Accounting Portal will auto-populate in the “Requested By” section of the ticket (**end user will appear as the ticket submitter**).

“Requested By” Section



How to Submit a Prior Approval Request

Requested By

Name: [submitter's name]
 Email: [submitter's email address]
 Phone: [submitter's office phone number]

- If the end user is submitting a ticket on behalf of another employee, click the **“Requested for Someone Else”** checkbox (located under the **“Requested By”** section), and the **“Requested For”** section will appear on the screen.

“Requested By” Section

Requested By

Name:

Email:

Phone:

Requested for Someone Else


“Requested For” Section

Requested For

Name:

Email:

Phone:

- Click the **“Search”** button  next to the **“Name”** field and locate the employee’s name within the search window. Double-click on the employee’s name and the employee’s contact information will populate in the fields listed under the **“Requested For”** section.

1.3. Fill out the **“Prior Approval Request Form”** accordingly.

Program Guidance 240 00
 Prior Approval Request

Prior Approval Request

Prior Approval Type:

Requesting Entity:

Requested Date:

Approval Period: From To

Is this a Request for someone approval?

Approval Requests

Prior Approval Item:

Reference Class:

Additional Information:

Estimated Total Cost:

Funding Source(s):

Certification Statement

Please note that transmission of this request from to OGL indicates your acknowledgment of applicable purchasing policies and/or procurement strategies from the OGL Uniform Grant Purchase and PMS requirements or other program guidelines. Transmission of this request from to OGL also indicates compliance with the above-referenced approvals.

I certify that the information provided is true and correct.

Name of Person Completing Form:

Date Signed:

Notes

Any approval submitted by OGL is only applicable to funding from OGL, it does not apply to other funding sources and other state sub-agencies.

OGL is providing a prior approval to identify the funding information associated with this request in the way that the grant application is or if approved? Failure to do so may result in the request being denied.

- Failure to provide documentation
- Failure to follow internal, state, or federal policies
- Expenditure is not necessary, allowable, and reasonable in
- Failure to comply with applicable federal and state laws or regulations.

Please Note:

- Red border box fields are required to be completed.**

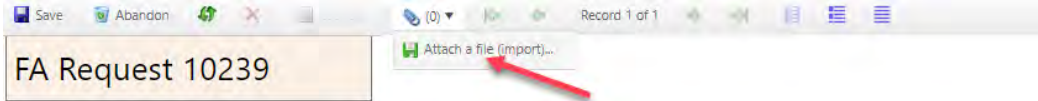
1.4. If the submitter needs to add an attachment file to the FA ticket, click the attachment file icon





located on the top of the ticket template and select **“Attach a file (Import)”**.



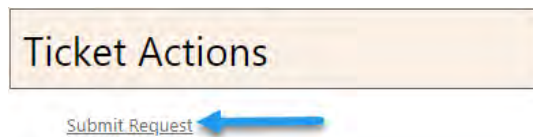
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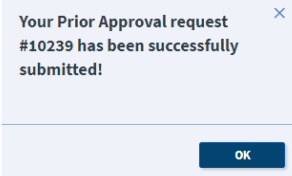
- Once the “**Import File**” window appears on the screen, click the green plus button  next to the “**File Name**” field to locate and attach a file from your workstation to the FA Ticket.

- Click the “**Save**” button once the file is identified in the “**File Name**” field. If done successfully, the attachment file icon will increase by one .

- 1.5. Click the “**Submit Request**” link, which is located under the “**Ticket Actions**” section, and a “**Ticket Submission Notification**” will appear on the screen.



Ticket Submission Notification:



- An email notification of the FA Ticket creation will be sent to the customer(s) listed in the ticket.
- The FA Request ticket status will change from “**New**” to “**Grant Manager**”.

Before Ticket Submission

FA Request 10239

Status: New

Description:

After Ticket Submission

FA Request 10239

Status: Contract/Grant Manager

Description: Review and Complete

- The Grant Manager assigned to the coalition selected in the FA Ticket will receive and review the prior approval request.



How to Submit a Prior Approval Request

2. Checking the Status on an Existing Prior Approval Request

2.1. To check the status on an existing FA Ticket, locate the “My FA Request Tickets” widget from the main page of the Finance and Accounting Portal, and click the number under the “My Requests - OPEN” column.

My FA Request Tickets		
	OPEN	CLOSED
My Requests	3	0
My Approvals Needed	0	

[VIEW DASHBOARD >](#)

2.1.1. From the “Open Annual Prior Approvals” page, the current status of an FA Ticket will display in the “Status” column.

Open Annual Prior Approvals

Request ID	Created Date Time	Phase Number	Status
10239	2/6/2019 11:35 PM		2. Contract/Grant Manager
10233	2/3/2019 11:49 AM		2. Contract/Grant Manager
10231	2/3/2019 11:35 AM		2. Contract/Grant Manager

2.2. To view any documented updates from the existing FA Ticket, double-click on the “Request ID” (FA Ticket number) to bring up the FA Ticket in read-only mode.

Open Annual Prior Approvals

Request ID	Created Date Time	Phase Number	Status
10239	2/6/2019 11:35 PM		2. Contract/Grant Manager
10233	2/3/2019 11:49 AM		2. Contract/Grant Manager
10231	2/3/2019 11:35 AM		2. Contract/Grant Manager

2.2.1. From the FA Ticket, click on the “Journals” tab to view all incoming/outgoing emails, and documented journal notes.

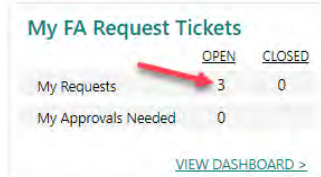




How to Submit a Prior Approval Request

3. Adding a Customer Note to an Existing Prior Approval Request

- 3.1. To add a customer note to an existing FA ticket, locate the “My FA Request Tickets” widget from the main page of the Finance and Accounting Portal, and click the number under the “My Requests - OPEN” column.

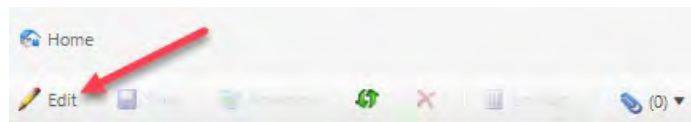


- 3.1.1. From the “Open Annual Prior Approvals” page, double-click on the “Request ID” (FA Ticket number) to bring up the FA Ticket.

Open Annual Prior Approvals

Request ID	Created Date Time	Phase Number	Status
10239	2/6/2019 11:35 PM		2. Contract/Grant Manager
10233	2/3/2019 11:49 AM		2. Contract/Grant Manager
10231	2/3/2019 11:35 AM		2. Contract/Grant Manager

- 3.1.2. The FA Ticket will appear on the screen in **read-only** mode. Click the “Edit” button to access the ticket in **edit** mode.



- If done successfully, the “Click on the Edit button above to edit this record” message will disappear.

Before Selecting the “Edit” Button
Click on the Edit button above to edit this record!

FA Request 10239

Status: Contract/Grant Manager
Description: Review and Complete

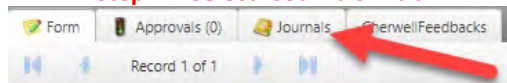
After Selecting the “Edit” Button

FA Request 10239

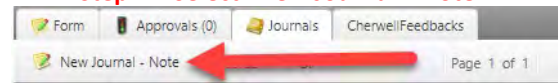
Status: Contract/Grant Manager
Description: Review and Complete

- 3.1.3. From the FA Ticket, click on the “Journals” tab and select “New Journal – Note”.

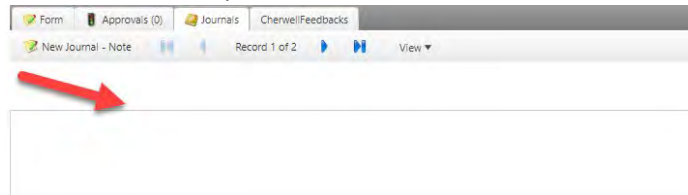
Step 1 – Select “Journals” Tab



Step 2 – Select “New Journal – Note”



- If done successfully, the “New Journal – Note” field will appear on the screen.



- 3.1.4. Fill out the “New Journal – Note” field accordingly and click the “Save” button to update and return the FA Ticket to **read-only** mode.