**ACCOUNTING REVIEW FOR APPROVAL**

Communication and process for accounting’s review of budget and index number requests

**REVIEWING PENDING REQUESTS**

* Login to SmartGrant via eWeber app:

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* Click the “Weber State University” icon on the bottom right and sign in using your WSU login credentials—Duo approval will be required:

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* After a signing in, the SmartGrant home screen will display your “To do list”— click on “View detail”:



* All pending tasks will be displayed. To access an individual task, click on the blue pencil icon to the left of the GAID number:



* The budget will be displayed, including all index numbers and Account codes. Select “Revision Approval” on the top, near right menu in red text:

 

* To view Account Code breakdowns, click on the blue pencil icon on the left of the selected Account Code. This screen will display:



* To view an individual index number breakdown, click on the selected index number column:



* This is what the index number display looks like:



* To approve or reject an initial budget or budget revision, click “Signature”:



* Under the “CG Contracts & Grants” section, select from the left dropdown to Approve or Reject and include necessary notes in the “Comments:” section:



* Select “Update”

**SENDING EMAILS**

* In SmartGrant, select relevant award
* On the top menu, select “Communications”



* A pop-up box will open, select “Add”



* In the communication pop-up, complete the following:
	+ Subject:
	+ Medium: select “Email”
	+ Type:
	+ Email Source: leave blank
	+ Public/Private: “Public”
	+ Send Email: select the box, then click on the person icon
		- You will be prompted to choose from auto-populated lists based on the PIs department chair, dean, or co-PIs
		- Select recipients to send email to, including CC and BCC options
	+ Attachments: click on the paperclip icon to choose attachments to send
	+ Communication Text: type personalized note. **Important** — include instructions for email recipients to respond directly to the original email. This ensures communications are logged within SmartGrant, without having to upload emails, notes or other files.
		- *Suggested text:* To submit, reply directly to this email with completed forms attached. Subject line MUST include [GAID156] before all other text.
	+ Update



**ADDING NOTES**

* In SmartGrant, select relevant award
* On the top menu, select “Communications”



* A pop-up box will open, select “Add”



* In the communication pop-up, complete the following:
	+ Subject:
	+ Medium: select “Note to File”
	+ Type:
	+ Email Source: leave blank
	+ Public/Private: “Public”
	+ Send Email: leave blank
	+ Attachments: click on the paperclip icon to choose attachments to send
	+ Communication Text: type personalized note.
* Update



**VIEWING COMMUNICATIONS**

* In SmartGrant, select relevant award
* On the top menu, select “Communications”



* Select “Edit” icon on left of communication to open, view attachments, print, or delete

