Office of Senior Vice President for Research
Office of Research Information Systems

Central Administration Matching Funds

User Guide

Job Queue Instructions for Request Forms

Penn State IT, Digital Optimization
Version 1.0
February 20, 2024
Overview

In 2024, the Penn State IT Digital Optimization team, at the direction of the Office of Senior Vice President for Research, Office of Research Information Systems, created electronic forms to replace the following paper forms.

- Request for Central Administration Matching Funds – Other
- Request for Central Administration Matching Funds – Equipment
- Request for Central Administration Matching Funds Assistantships/Traineeships

This user guide provides the **Job Queue Instructions for Request Forms** to assist reviewers/approvers through the steps required to complete the following new electronic eForms for Matching Funds requests. (Form samples are shown at the end of this document.)

- Central Administration Matching Funds – Other
- Central Administration Matching Funds – Equipment
- Central Administration Matching Funds – Assistantships/Traineeships

All forms follow the same path within the business process workflow for securing approvals:

- Dean/Director
- OSVPR Approver
- Sr VP for Research

Each reviewer/approver has the capability to reject the request. Any rejected form is returned to the submitter with an option to edit and resubmit, or cancel.
The requester of Central Administration Matching Funds completes the appropriate request form, based on their needs, via the URL located on the OSVPR website.

When the requester completes and submits the form, a business process workflow for the approval of their request begins and an email is sent to the Dean/Director as the first reviewer/approver.

1. Each reviewer/approver within the workflow is sent the following email, when the form progresses to their step in the flow, as notification for needed review and action of the request.

   ![Email Example]

   2. The email displays the submitter of the form and provides a link into the DocFinity system (requires PSU VPN), which handles the workflow for processing the request document.

   3. When the link is clicked, the user will be taken to the Job Views workspace and a list of Job Queue names. (Note: only a couple job names may be listed.)

   ![DocFinity Workflow]

   4. Select the OSVPR Central Match Review Job Queue name and click on the Get Job Queue button at the bottom.
5. A new Job Queue panel will open for the OSVPR Central Match Review, showing a list of forms requiring review/approval.

6. Select the checkbox next to (or double click) the form to be reviewed and click Check Out Job from the menu at the top of the panel.

7. Once the job is checked out, a View panel will open to see the form, and a Tasks panel will appear with tasks that need to be completed.

8. Review the form, including any attachments.
   a. Clicking on an attachment in the form will open it in a new Viewer window.
b. To “pop out” the attachment to see it in full screen, click the **Open in New Window** icon in the top right corner. (Click ✧ to pop it back in.)

9. After completing the review of the form and attachments, select the **Approve or Reject** task description line.
   
a. A pop-up window displays to allow the selection of **Yes** to approve or **No** to reject the form.

b. Selecting **Yes** and clicking the **Save** button will close the form and move it on to the next reviewer/approver which repeats the steps starting at #1 above.
   
i. Note: If the final reviewer/approver has just completed this step, the process to request the funds ends and an approval email is sent.

   c. Selecting **No** and clicking the **Save** button will open a new task “Add rejection notes” under the **Tasks**.
d. Selecting this task will display a new pop-up window.

i. Enter notes in the *Rejection Notes* box and click **Save**.

ii. The form will automatically close and send an email back to the submitter, including notes from the *Rejection Notes* box.

iii. When the submitter receives the email and goes back into the request, options will be available to make changes to the form and resubmit, or cancel.
### Sample – Central Administration Matching Funds - Other

**Central Administration Matching Funds - Other**

![Image of the form](image)

**General Information**
- **College/Institute**: [Select]
- **Department**: [Enter Department Name]
- **Proposal Title**: [Enter Proposal Title]
- **Proposal Deadline**: [MM-DD-YY]
- **OSP File**: [File Number]
- **Form Number**: [Form Number]

**Request for Central Administration Matching Funds - Other**

**Instructions:** For Central matching funds, you must:
1. Complete all sections of this form
2. Attach the proposed budget
3. Attach a memo that provides details on the match request including specific uses of funds (i.e., renovations, graduate assistantships, salaries, equipment, etc.)
4. Secure your Research Dean/Institute Director's signature

- **Amount of Match Required by the Sponsor**: [%]
- **Cost Share Type**: [Enter Cost Share Type]
- **Start Calculation Fiscal Year**: [Enter Fiscal Year]

**Budget Period**
- **Begin**: [MM-DD-YY]
- **Total Months**: [Enter Total Months]

**Matching Recommendation**

<table>
<thead>
<tr>
<th>Month</th>
<th>Sponsor F&amp;A</th>
<th>Sponsor Total F&amp;A</th>
<th>Cost Share Type</th>
<th>Start Calculation Fiscal Year</th>
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<tbody>
<tr>
<td>1</td>
<td>$0.00</td>
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<td>Default...</td>
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</table>

**Col/Institute Cost Match**

- **Amount**: $0.00

**TOTAL**

<table>
<thead>
<tr>
<th>Month</th>
<th>Sponsor F&amp;A</th>
<th>Sponsor Total F&amp;A</th>
<th>Cost Share Type</th>
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<td>Default...</td>
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</table>

**TOTAL**

- **$0.00**

**Notes:**
- Specify the use of matching funds (i.e., renovations, faculty/staff assistant, etc.)
- Specify the College/Institute Department and the use of matching funds (i.e., College of Science/Engineering, College of Engineering graduate assistantship, etc.)

**Attach documents here:**
- Upload proposed budget
- Upload details memo
- Additional attachments

Upon submission, this form and its attachments will be sent to the Research Dean/Institute Director below for signature:

- **Research Dean/Institute Director's Access ID**: [Enter Access ID]
- **Director Name**: [Enter Name]

**Submit For Approvals**
Sample - Central Administration Matching Funds – Equipment
- Sample - Central Administration Matching Funds – Assistantships/Traineeships

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**Central Administration Matching Funds - Assistantships/Traineeships**

**Date Submitted:** 02-16-2024

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**General Information**

<table>
<thead>
<tr>
<th>College/Institute</th>
<th>*</th>
<th>PI Name:</th>
<th>*</th>
<th>Number of students/year on project:</th>
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<tr>
<td>Department:</td>
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</table>

- *Proposal Title:*
- *Proposal Deadline:*
- *CIF No:*
- *Form Number:*

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**Request for Central Administration Matching Funds - Assistantships/Traineeships**

Instructions: For Central matching funds, you must:
1. Complete all sections of the form
2. Attach the proposal budget
3. Attach a budget outlining only the sponsor’s O&A expenses
4. Secure your Research Dean/Institute Director’s signature

**Amount of Match Required by the Sponsor:** %

**Matching Funds Requested based on:**

**Budget Period:**

<table>
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<th>Period</th>
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**Matching Recommendation**

<table>
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<tr>
<th>Sponsor’s O&amp;A Support w/o F&amp;A</th>
<th>Sponsor’s O&amp;A on DA(s)</th>
<th>Current</th>
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</thead>
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</tbody>
</table>

**Total College/Institute/Dept Match:**

* Equal to college/institute/department match, must exceed $10,000 annually

**Attach documents here:**

- Choose File: *Upload proposal budget*
- Choose File: *Upload details memo*
- Additional Uploads

Upon submission, this form and its attachments will be sent to the Research Dean/Institute Director below for signature.

- Research Dean/Institute Director’s Access ID
- Dean/Director Name

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**Submit For Approvals**