

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

**Central Administration Matching Funds**

**User Guide**

**Submitter Instructions for Rejected 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 **Submitter Instructions for Rejected Forms** to assist submitters 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:

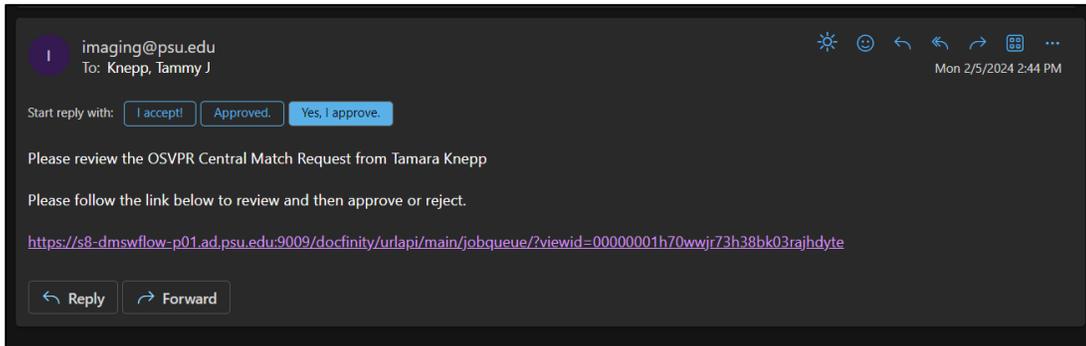
- Dean/Director
- OSVPR Approver
- Sr VP for Research

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.

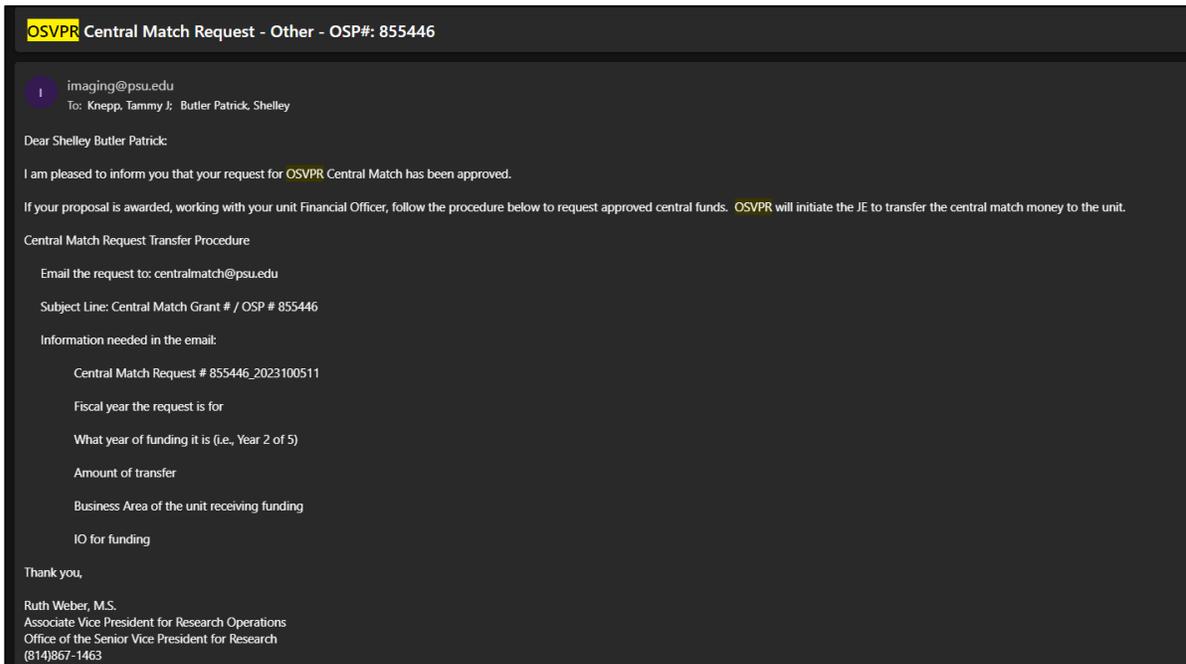
The requester of Central Administration Matching Funds completes the appropriate request form, based on their needs, via the URL located on the OSVPR website.

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.

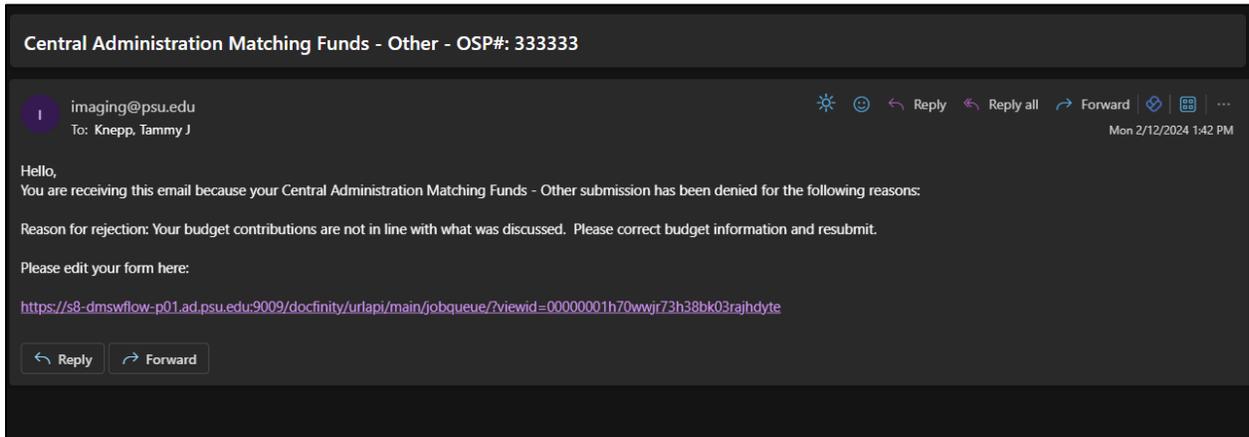
1. Each reviewer/approver within the workflow is sent the following email, when the form progresses to their step in the flow, as notification for needed review and action of the request.



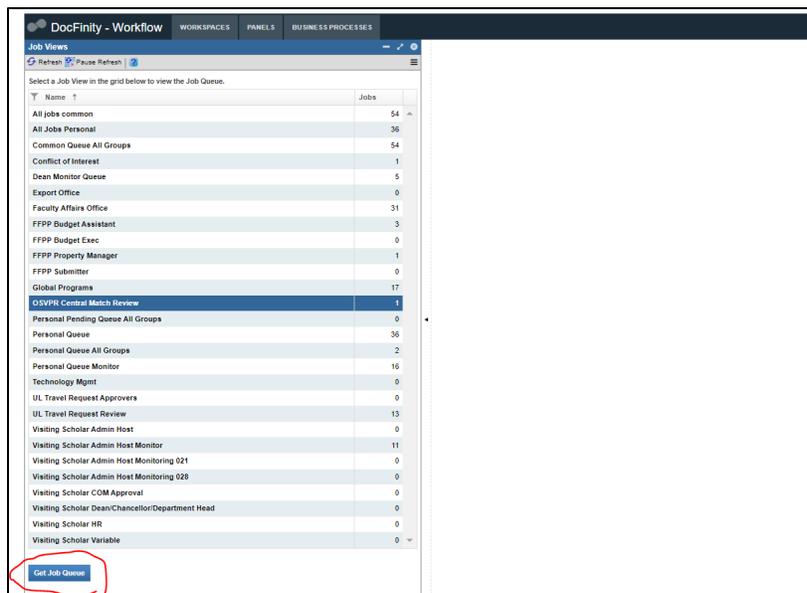
2. The email displays the submitter of the form and provides a link into the DocFinity system which handles the workflow for processing the request document.
3. The workflow will continue through the system to the OSVPR Approver and the Sr VP for Research; when the form has completed the path and is approved, the submitter will receive an email.



- If, at any point along the workflow, the form is rejected, the submitter will receive an email indicating the reason for rejection.

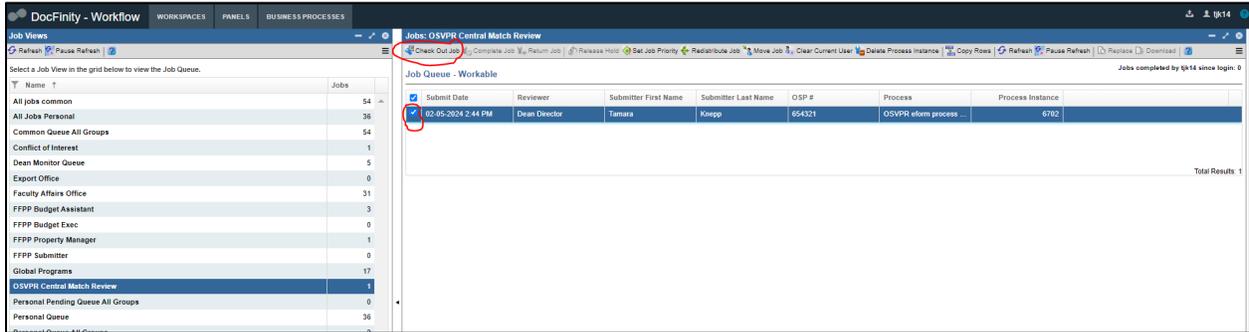


- Along with the rejection reason, the email will also provide a link into the DocFinity system (requires PSU VPN) with the option to edit the form and resubmit, or cancel the form.
- When the link is clicked, the user will be taken to the *Job Views* workspace and a list of *Job Queue* names. (Note: only a couple job names may be listed.)

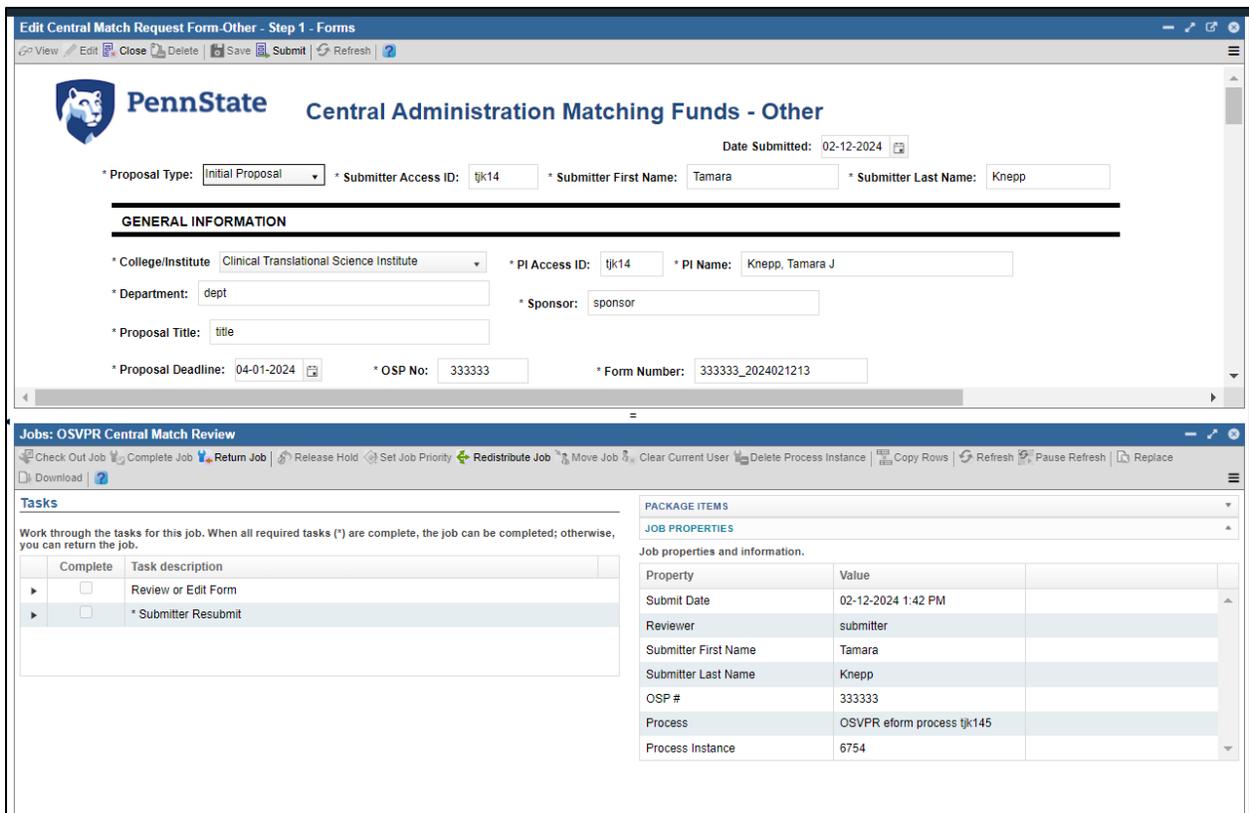


- Select the **OSVPR Central Match Review** *Job Queue* name and click on the **Get Job Queue** button at the bottom.

- A new *Job Queue* panel will open for the *OSVPR Central Match Review*, showing the rejected form requiring attention.



- 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.
- 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.



11. Review the form, including any attachments; attachments can also be added/deleted.

a. After making any changes necessary, click **Save** on the menu bar.

The screenshot shows a web browser window titled "Edit Central Match Request Form-Other - Step 1 - Forms". The top menu bar includes "View", "Edit", "Close", "Delete", "Save", "Submit", and "Refresh". The "Save" button is circled in red. Below the menu bar is the PennState logo and the title "Central Administration Matching Funds - Other". The form contains several input fields: "Proposal Type" (Initial Proposal), "Submitter Access ID" (tjk14), "Submitter First Name" (Tamara), "Submitter Last Name" (Knepp), "Date Submitted" (02-12-2024), "College/Institute" (Clinical Translational Science Institute), "PI Access ID" (tjk14), "PI Name" (Knepp, Tamara J), "Department" (new dept), "Sponsor" (sponsor), "Proposal Title" (title), "Proposal Deadline" (04-01-2024), "OSP No" (333333), and "Form Number" (333333\_2024021213). At the bottom, there is a "Jobs: OSVPR Central Match Review" section with various action buttons like "Check Out Job", "Complete Job", "Return Job", "Release Hold", "Set Job Priority", "Redistribute Job", "Move Job", "Clear Current User", "Delete Process Instance", "Copy Rows", "Refresh", "Pause Refresh", and "Replace".

b. Clicking on an attachment in the form will open it in a new *Viewer* window.

c. 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.)

The screenshot shows a "Document Viewer - tjk14 - page 1" window. The top menu bar includes "Save", "Cancel", "Fit to Height", "Fit to Width", "Rotate CW", "Rotate CCW", "Print Document(s)...", "Email Document(s)...", "Add to Clipboard", "Hide Markup", "Cancel markup/redaction", "Redact", "Stamp", "Text", "Footnote", "Rectangle", "Highlight", "Ellipse", "Arrow", "Line", "Freehand", "Place Markup", "Delete the selected markup(s)", "Edit", "View document info", and "View Notes". The "Open in New Window" icon in the top right corner is circled in red. The window also has a "THUMBNAILS" section at the bottom left.

12. After completing edits of the form and attachments, select **Submitter Resubmit** in the *Tasks*.

a. A pop-up window displays to allow the selection of **Yes** to resubmit this form or **No** to not resubmit the form.

The screenshot shows a pop-up dialog box titled "Do you want to resubmit this request?". The dialog box contains the text "Fields marked with an \* are required." and the question "\* Do you want to resubmit this request?". Below the question is a dropdown menu with the following options: "Select", "Yes", and "No". The "Save" and "Cancel" buttons are located at the bottom right of the dialog box.

- b. Selecting **Yes** and then clicking the **Save** button will add a new task to change the Proposal Type to Revised Proposal.
  - i. Select **Change Proposal Type to “Revised Proposal”** in the *Tasks* panel and then locate the *Proposal Type* field. In the drop-down, change **Initial Proposal** to **Revised Proposal**.

**Jobs: OSVPR Central Match Review**

Complete	Task description
<input checked="" type="checkbox"/>	Review or Edit Form
<input checked="" type="checkbox"/>	* Submitter Resubmit
<input type="checkbox"/>	* Change Proposal Type to "Revised Proposal"

Property	Value
Submit Date	02-12-2024 1:42 PM
Reviewer	submitter
Submitter First Name	Tamara
Submitter Last Name	Knepp
OSP #	333333
Process	OSVPR eform process tjk145
Process Instance	6754

- ii. Click the **Save** button in the *Edit* panel at the top of the form.
  - iii. The form will close and be resubmitted to the Dean/Director to follow through the approval process again.
- c. If the form should not be resubmitted, select **No** and then click the **Save** button; locate and select the **Complete Job** in the menu bar.
    - i. The form will automatically close and the process will terminate. No further notifications are sent.

- Sample – Central Administration Matching Funds - Other

## PennState Central Administration Matching Funds - Other

Date Submitted: 02-16-2024

\* Proposal Type:  \* Submitter Access ID:  \* Submitter First Name:  \* Submitter Last Name:

---

**GENERAL INFORMATION**

\* College/Institute:  \* PI Access ID:  \* PI Name:

\* Department:  \* Sponsor:

\* Proposal Title:

\* Proposal Deadline:  \* OSP No:  \* 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 proposal 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's/Institute Director's signature

\* Amount of Match Required by the Sponsor:  % \* Cost Share Type:  \* Start Calculation Fiscal Year:

**Budget Period:\***

\* Begin:  \* Total Months:

	1	2	3	4	5	6	7	
* Total Months	<input type="text" value="MM-DD-YYYY"/>							

								TOTAL \$
Sponsor w/o F&A	<input type="text" value="\$0.00"/>							
Sponsor Total F&A	<input type="text" value="\$0.00"/>							
Central	<input type="text" value="\$0.00"/>							
Central	<input type="text" value="\$0.00"/>							
Central	<input type="text" value="\$0.00"/>							

College/Institute/Dept Match								
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						
**	<input type="text"/>	<input type="text" value="\$0.00"/>						



Sample - Central Administration Matching Funds – Assistantships



## PennState Central Administration Matching Funds - Assistantships/Traineeships

Date Submitted:

---

\* Proposal Type:  \* Submitter Access ID:  \* Submitter First Name:  \* Submitter Last Name:

---

**GENERAL INFORMATION**

---

\* College/Institute  \* PI Access ID:  \* PI Name:

\* Department:  \* Sponsor:

\* Proposal Title:  Number of students/year on project:

\* Proposal Deadline:  \* OSP No:  \* Form Number:

---

**REQUEST FOR CENTRAL ADMINISTRATION MATCHING FUNDS - ASSISTANTSHIPS/TRAINEE SHIPS**

---

Instructions: For Central matching funds, you must:

- (1) complete all sections of this form
- (2) attach the proposal budget
- (3) attach a budget outlining only the sponsor's GA expenses
- (4) secure your Research Dean's/Institute Director's signature

\* Amount of Match Required by the Sponsor:  % \* Cost Share Type:  Start Calculation Fiscal Year:

Matching funds request based on:

**Budget Period:\***

\* Begin:  1 2 3 4 5 6 7

\* Total Months  \*  \*

Matching Recommendation								TOTAL \$
Sponsor's GA Support w/o F&A	<input type="text" value="\$0.00"/>							
Sponsor's F&A on GA(s)	<input type="text" value="\$0.00"/>							
Central* <input type="text"/>	<input type="text" value="\$0.00"/>							

---

**College/Institute/Dept Match**

<input type="text"/>	<input type="text" value="\$0.00"/>							
<input type="text"/>	<input type="text" value="\$0.00"/>							
<input type="text"/>	<input type="text" value="\$0.00"/>							
<input type="text"/>	<input type="text" value="\$0.00"/>							
<input type="text"/>	<input type="text" value="\$0.00"/>							
<input type="text"/>	<input type="text" value="\$0.00"/>							
<input type="text"/>	<input type="text" value="\$0.00"/>							
<input type="text"/>	<input type="text" value="\$0.00"/>							
<input type="text"/>	<input type="text" value="\$0.00"/>							
<b>Total College/Institute/Dept Match</b>	<input type="text" value="\$0.00"/>							

---

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

---

Attach documents here:

\* Upload proposed budget  Additional Uploads

\* Upload details memo  Additional Uploads

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

\* Research Dean's/Institute Director's Access ID  \* Dean/Director Name