Instructions for Requesting Overdraft Spending

NOTE: Overdraft Spending requests can only be requested in the Proposal Routing Status screen by a member of the Research Team (including Proposal Editor's) or the original owner/creator of the IPF routing.

1. **New FIS Account**
   - Go to your "My Proposals" (Submitted Proposal tab) or "Proposals in My Unit" dashboard. Select the appropriate Proposal Number hyperlink to open the Cayuse SP record you would like to request an Overdraft on.
   - The Proposal Routing Status screen will appear, navigate to the Overdraft Spending tab and click the "Add Overdraft Spending Request to Proposal" hyperlink. Note: The IPF status must be one of the following in order to request an Overdraft: JIT/Sponsor Request Submitted, Pending Sponsor Review or Funded)
   - The Overdraft Spending screen will appear. Only fields with red asterisk need to be completed. Once completed, click "Submit Overdraft Spending Request for Processing".

   FIELDS ON THIS SCREEN AND KSU USE FOR THESE FIELDS

   Description of Assurances of Funding: Include details supporting your request

   Type of Overdraft Spending: Select New Account

   Contact Information: Include the lead PI's name, telephone and email

   You have now initiated an Overdraft Spending request; it is routing in Cayuse SP for approvals.

2. **Continuing FIS Account**
   - Go to the Project Administration screen for the project and select the "Proposal" tab. All Overdraft Spending requests must be associated with an IPF routing. Select the most recent "Proposal No" hyperlink in order to navigate to the appropriate screen for requesting the Overdraft Spending.
   - The Proposal Administration screen will appear, select the "Proposal" number hyperlink in the upper left-hand corner in order to navigate to the IPF screen. As a reminder, Overdraft Spending requests can only be initiated from the Proposal Routing Screen. Click the "View Routing Status" button to navigate to the appropriate screen.
   - The Proposal Routing Status screen will appear, navigate to the Overdraft Spending tab and click the "Add Overdraft Spending Request to Proposal" hyperlink.
   - The Overdraft Spending screen will appear. Only fields with red asterisk need to be completed. Once completed, click "Submit Overdraft Spending Request for Processing".

   FIELDS ON THIS SCREEN AND KSU USE FOR THESE FIELDS

   Description of Assurances of Funding: Include details supporting your request

   Type of Overdraft Spending: Select Continuing Account

   Contact Information: Include the lead PI's name, telephone and email

   You have now initiated an Overdraft Spending request; it is routing in Cayuse SP for approvals.