

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. Go to your "My Proposals" of "Proposals in My Unit" (Submitted Proposal tab) and select the appropriate Proposal Number hyperlink to open the Cayuse SP record you would like to request an Overdraft on. Be aware that there may be more than one IPF with the same title (all related to the same project). You will want to select the Award IPF. You can confirm which IPF is associated with the Award (versus PreProposal or Proposal) by opening the IPF and verifying the Proposal Type field in the IPF General Information section.

Note for Global Users: If you can use the Project Dashboard to find the record. Once you select the IPF record number hyperlink 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.

2. 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)
3. 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 including the specific reason(s) why the Principal Investigator is confident an award is forthcoming as well as the temporary end date preferred for the account extension request. This will provide departmental and college leadership with the appropriate details to support their authorization decision.

Type of Overdraft Spending: Select **New Account** (new FIS project number is needed) or **Continuing Account** (continued use of a current FIS project number)

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.