PI Approval cheat sheet:

- The PI will receive an email with subject line: Direct Retro PI Approval Needed.

- The body of the email will be:

  **UNIVERSITY of MARYLAND BALTIMORE**

  **TEST EMAIL**

  Request Number: 45

  Please Approve/Decline the following DR Request for Beryl Gwan - Manager, Costing & Compliance

  Use this link to Approve/Decline

- The PI will click on the link Approve/Decline which will take them to the database. They will use their single sign on to access the form. The top part of the screen is where the PI will:
  - Approve/Decline – select from the dropdown menu
  - Enter their initials - as proof of review
  - Provide a comment if necessary – under comments
  - Then submit – then click submit

![Direct Retro PI Approval Form](image-url)
The bottom portion provides the details of the request:

- **Request for** – the employee name, Dept. Name, the preparer, the preparer’s email and phone number.
- **Fiscal Year and Pay periods**
- **Credit and Debit Quantum Account Combo and HRMS codes**
- **The explanations for the cost transfer.**
- **Uploaded Documents.**

### Request For

<table>
<thead>
<tr>
<th>Employee Name:</th>
<th>Tracy Nguyen - Accountant I</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept Name:</td>
<td>Sponsor Proj Acctg &amp; Compliance</td>
</tr>
<tr>
<td>Prepared By:</td>
<td>Michelle Ward</td>
</tr>
<tr>
<td>Preparer Email:</td>
<td><a href="mailto:michelle.ward@umaryland.edu">michelle.ward@umaryland.edu</a></td>
</tr>
<tr>
<td>Preparer Phone:</td>
<td>410-706-2904</td>
</tr>
</tbody>
</table>

### Fiscal Year and Pay Periods

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Pay Period (FY-PP)</td>
<td>20-14</td>
</tr>
<tr>
<td>To Pay Period (FY-PP)</td>
<td>20-26</td>
</tr>
</tbody>
</table>

**Use Period XX-27** for dates after period end date of XX-26 thru 06/30/XX

- **Archived** - Is there an effort form related to this request and is it archived? You will be able to upload archived letters later in this form.
  - **Answer:** No
- **Certified** - Is there a certified effort form related to this request?
  - **Answer:** No
- **Certifier Employed** - Is certifier active employer?
  - **Answer:** Yes

### Credit Quantum Account Combo and HRMS Code

**NONSPON (Funds):**

<table>
<thead>
<tr>
<th>HRMS Combo Code</th>
<th>Source</th>
<th>Org</th>
<th>Function</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SPON (Funds):**

<table>
<thead>
<tr>
<th>HRMS Combo Code</th>
<th>Org</th>
<th>Proj ID</th>
<th>Award Funding Source</th>
<th>Funding Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>5200004738</td>
<td>09108000</td>
<td>10023313</td>
<td>EXT</td>
<td>345-C&amp;G State &amp; Local Federal Prima</td>
<td></td>
</tr>
</tbody>
</table>

### Debit Quantum Account Combo and HRMS Code

<table>
<thead>
<tr>
<th>HRMS Combo Code</th>
<th>Org</th>
<th>Proj ID</th>
<th>Award Funding Source</th>
<th>Funding Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
All cost transfers must include an explanation. This explanation should address the following three questions:

1. Why the chartstring being charged is appropriate.
2. How the amount being transferred was determined.
3. Why the charging was not correct on the original posting. An explanation merely stating that the transfer was made "to correct error" or "to transfer to correct project" is not sufficient.

Enter Debit Account Combo Owner who will approve this request (Enter name below)*

Chris Read - Manager, Web Development (25230031)
Debit Account Combo Owner Department
CITS Operations

Additional Approval - For Transfers Over 90 Days From Original Transaction
Reason over 90 days late:
789 Inv!

PI Certification - enter PI name below (enter last name or first name and last name or empid)
Michelle Ward - Dr, Sponsored Proj Acctg & Co (9180098)

Comments
Request Comments: text area to see PI approval screen
Uploaded Files:
Uploaded Documents

- Once submitted they will get the following message.

**eUMB Direct Retro**

Thank you. Your response was received successfully.