



Bond Tracking System

How to Revert a Project

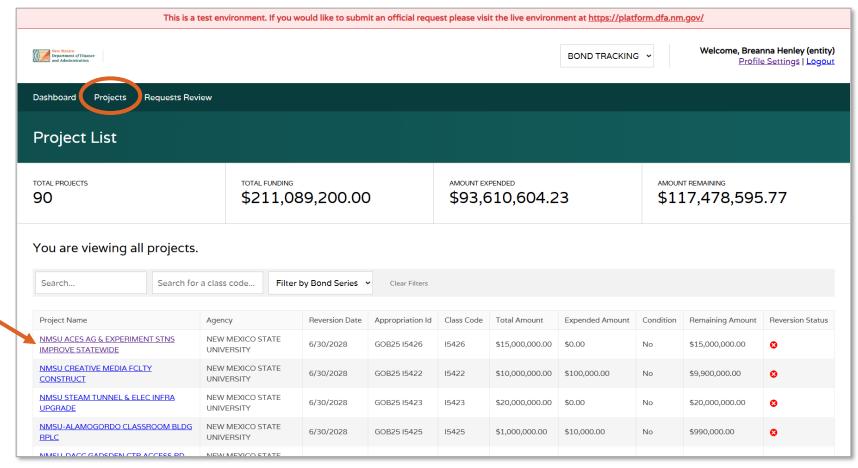


## Initiating a Reversion Throughout the Year



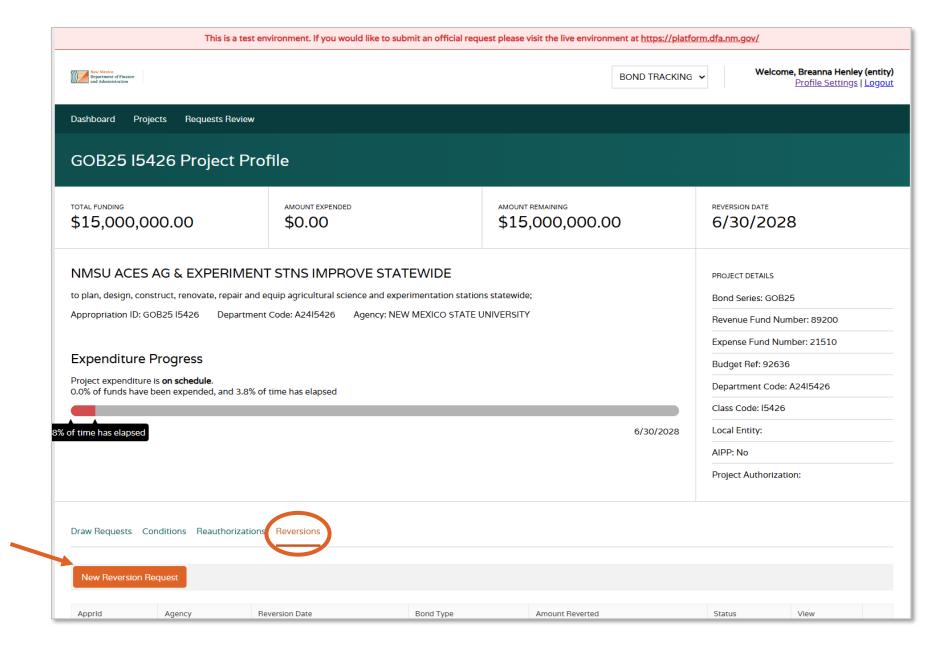
The workflow for reverting a project throughout the year is similar to a draw request: "Employee" roles can initiate the request, it is then routed to the agency "Signer" role, and then to Board of Finance.

To initiate a reversion, "Employee" should identify the project to revert under the "projects" tab, then click into the project.





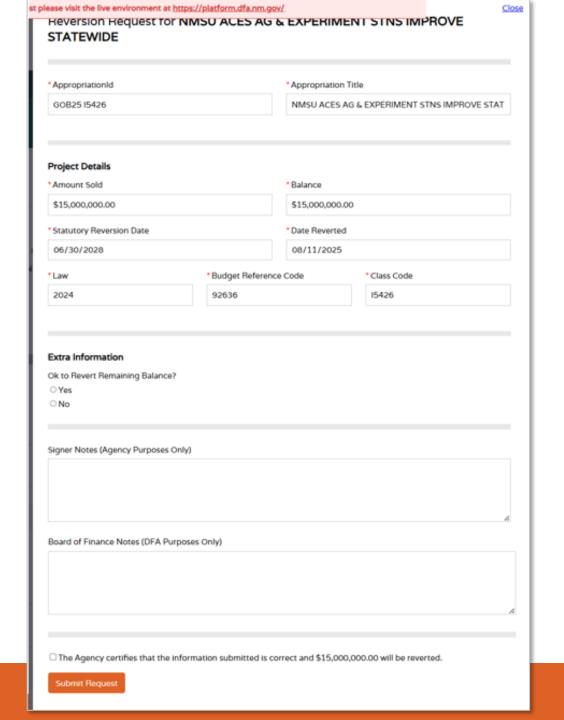
In the project profile, click the "reversions" tab and select "New Reversion Request" to begin a reversion.





After initiating a new reversion request, a modal form will pop up for completion.

Once submitted, the request will route to agency "Signer" role, and then on to Board of Finance.





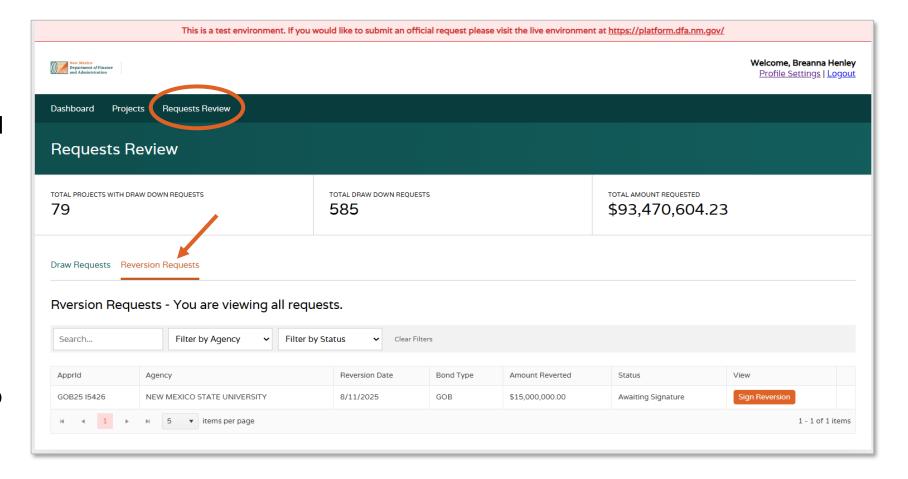
GOB projects require additional information if the request is to not revert the full balance of the appropriation.

Extra Information	
Ok to Revert Remaining Balance?	
○Yes	
● No	
List amount to be reverted, if any:	
Was there a contractor in place as of Today?	
○Yes	
○ No	
*What is the expetced completion date for the project?	
mm/dd/yyyy	<b>!!</b>
Will you expend the remaining balance within the next fiscal year?	
○Yes	
○ No	
$^*\cdot$ When do you expect to fully expend the appropriation?	
mm/dd/yyyy	<b>:::</b>
* Describe the status of the project	
	1.



"Approver" roles will find submitted reversion requests by going to the "Requests Review" page and viewing the "Reversion Requests tab".

Once approved by Board of Finance, the project profile will still be viewable, but the project will be closed and no draw requests can be submitted for the project.



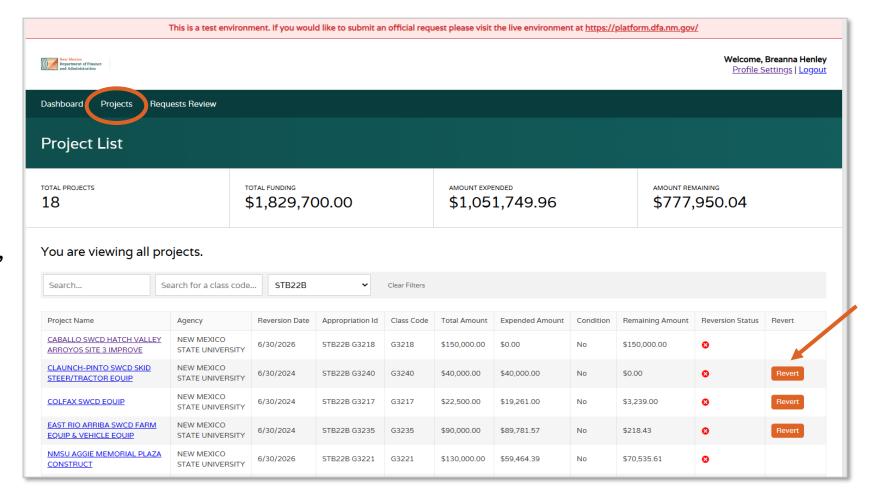


## **End of Year Reversions**



During the end of the year "Signer" roles can utilize a quick reversion feature. This step by-passes the need for "Employee" roles to initiate the reversion.

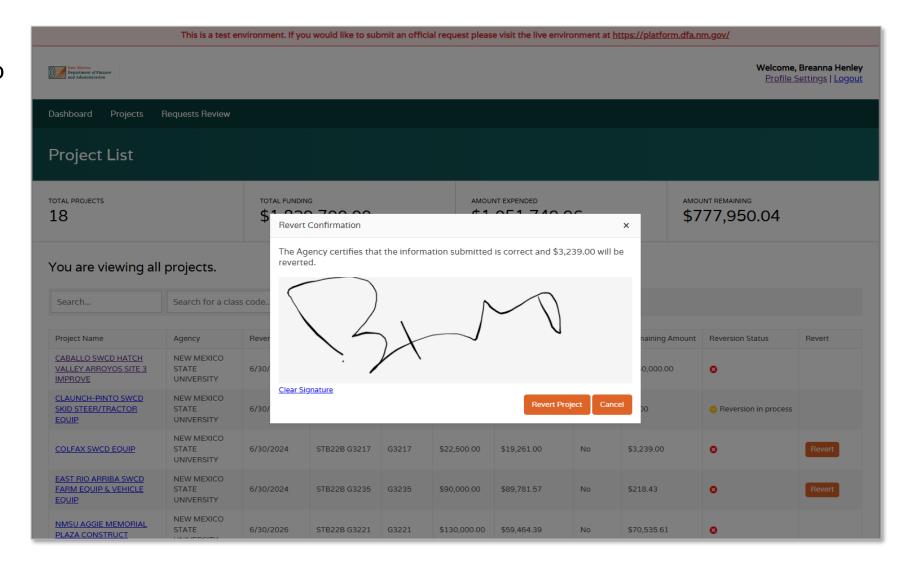
From July 1-Sept 1, a "revert" button will appear in the projects dashboard for projects that are reverting.





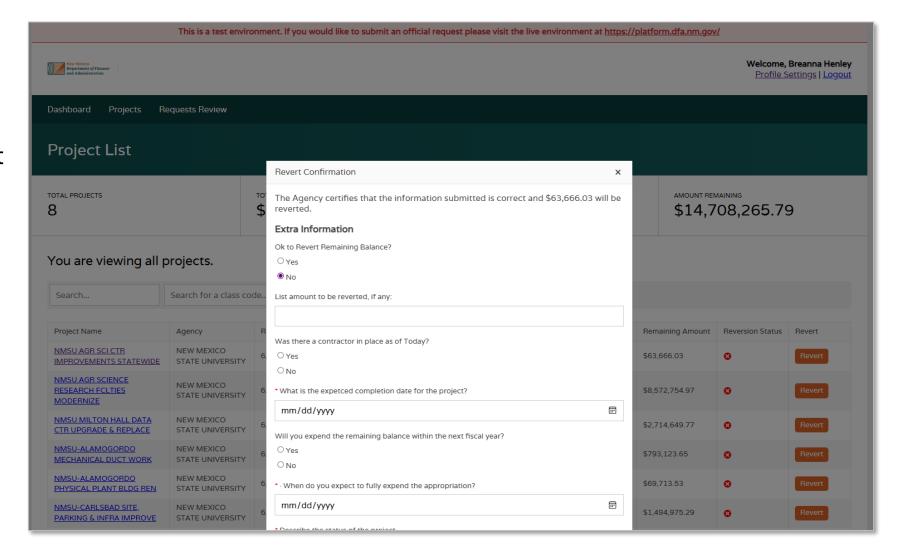
After clicking "revert", a pop-up box will appear to confirm the balance of the reversion.

Once submitted, the request will route to Board of Finance for approval.





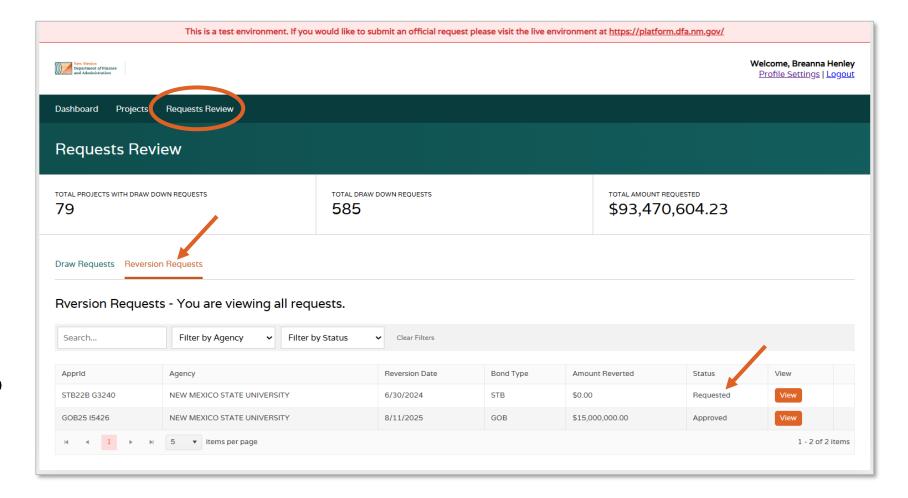
Just like reverting projects throughout the year, GOB projects require additional information if the request is to not revert the full balance of the appropriation.





Requested reversions will appear in the "Requests Review" page under the "Reversion Requests" tab. Until Board of Finance reviews, the request will be in "Requested status".

Once approved by Board of Finance, the project profile will still be viewable, but the project will be closed and no draw requests can be submitted for the project.





## Questions?

Contact NM Board of Finance or support@rtsolutions.com