

Overview: The 'Request Advance Account' activity should be used to request an account number for a project prior to receiving the official sponsor award document.

Please note:

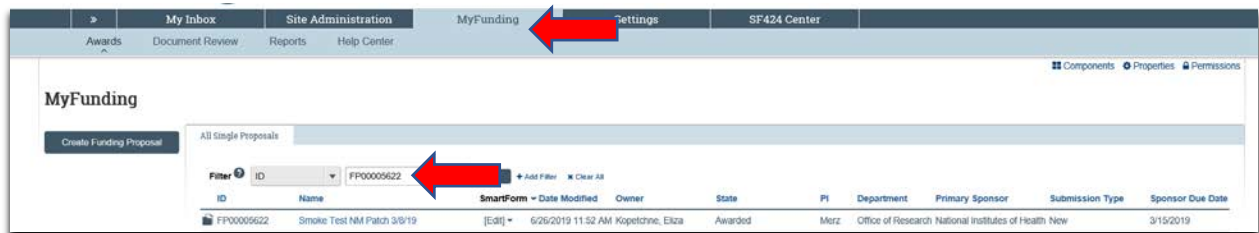
1. **Advance Accounts can be requested on both a funding proposal (that is in a 'Pending Sponsor Approval' state) and on an award (that is in a 'Draft' state).**

Examples:

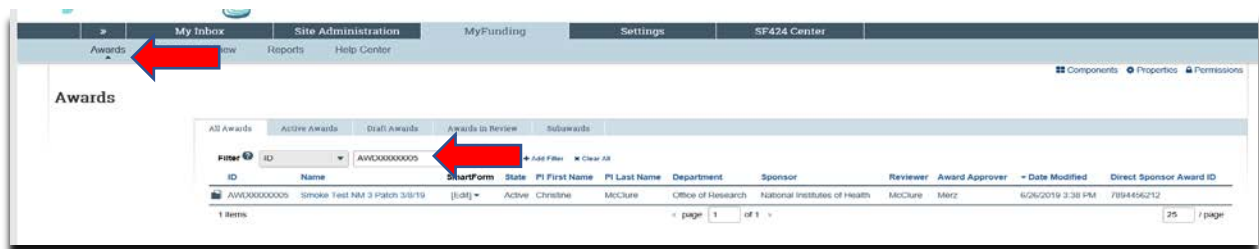
1. The Notice of Award (NOA) has not yet been received and the Principal Investigator would like to begin working on the project.
2. An incoming foundation agreement is in negotiations, but the Principal Investigator would like to begin working on the project.

Where to Start

1. Log into MyFunding
2. If the 'Advance Account' is being requested on a Funding Proposal, search for the record under the 'MyFunding' tab:

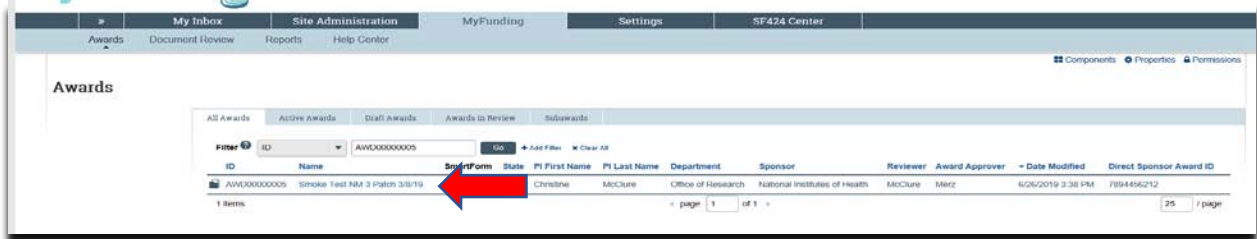


3. If the 'Advance Account' is being requested on an Award, search for the record under the 'Awards' tab:



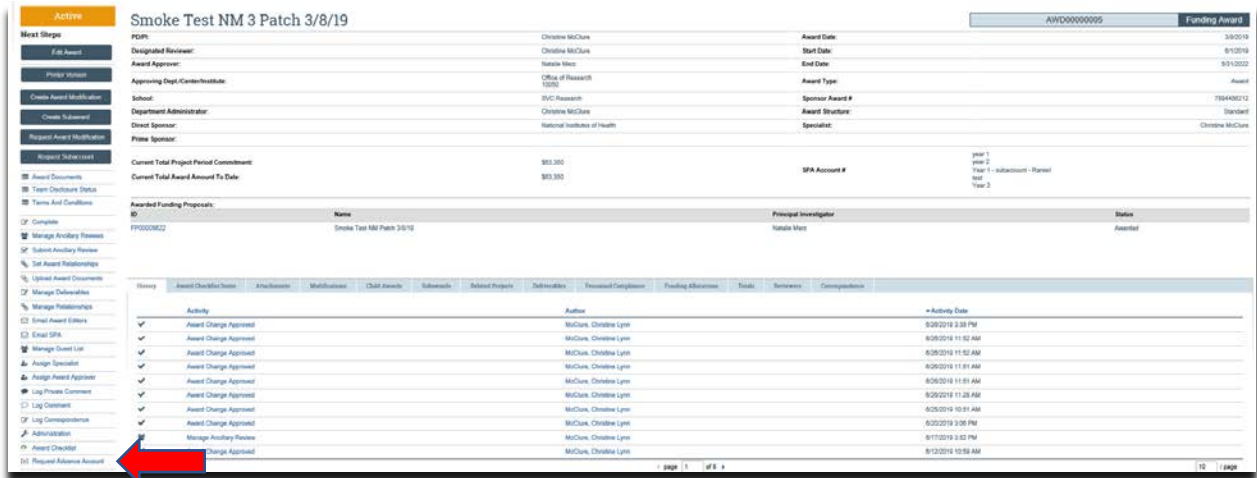
Department-Requesting an Advance Account

4. Click on the 'Name' of the project:



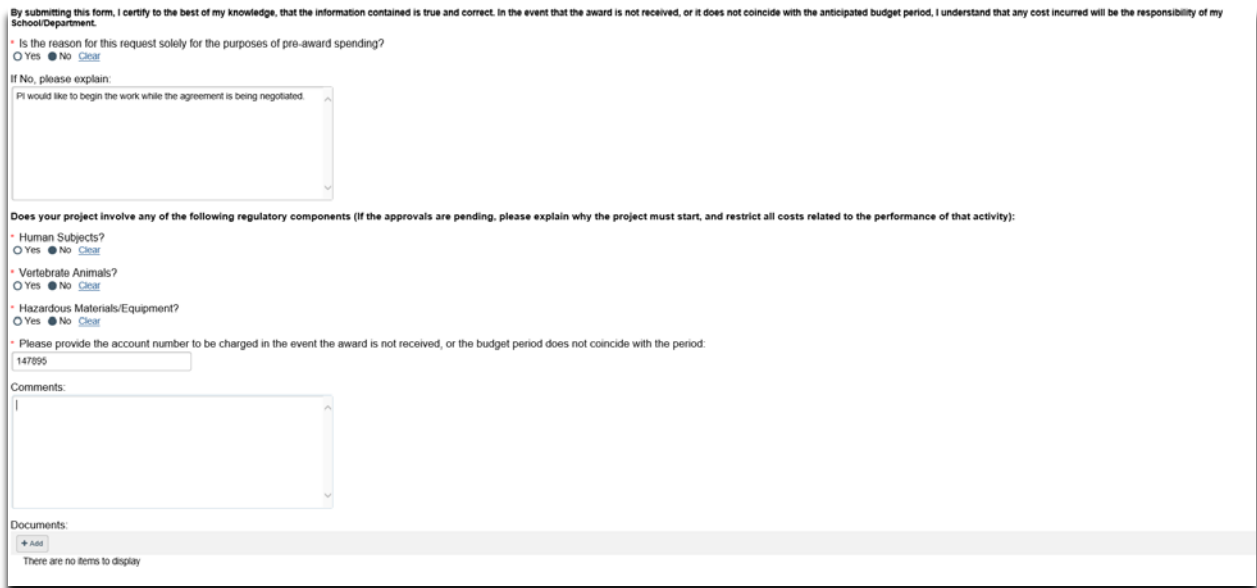
The screenshot shows the 'Awards' workspace in a web application. At the top, there are navigation tabs: 'My Inbox', 'Site Administration', 'MyFunding', 'Settings', and 'SF424 Center'. Below these are sub-tabs: 'Awards', 'Document Review', 'Reports', and 'Help Center'. The main area is titled 'Awards' and contains a filter bar with 'Filter ID' and a search box containing 'AWD00000000'. Below the filter bar is a table with columns: 'ID', 'Name', 'SmartForm', 'State', 'PI First Name', 'PI Last Name', 'Department', 'Sponsor', 'Reviewer', 'Award Approver', 'Date Modified', and 'Direct Sponsor Award ID'. The first row of the table has the following values: 'AWD00000000', 'Smoke Test NM 3 Patch 3/8/19', a blue link, 'Christine', 'McClure', 'Office of Research', 'National Institutes of Health', 'McClure', 'Maz', '6/26/2019 3:38 PM', and '7894456212'. A red arrow points to the 'Name' column of this row. At the bottom, it says '1 items' and 'page 1 of 1'.

5. Once in the records workspace, click on 'Request Advance Account':



The screenshot shows the 'Smoke Test NM 3 Patch 3/8/19' record workspace. The top bar includes 'Active', the project name, and 'AWD00000000 Funding Award'. Below this is a summary section with fields for 'FCRM', 'Designated Reviewer', 'Award Approver', 'Approving Dept./Center/Institute', 'School', 'Department Administrator', 'Direct Sponsor', and 'Prime Sponsor'. To the right of these fields are 'Award Date', 'Start Date', 'End Date', 'Award Type', 'Sponsor Award #', 'Award Structure', and 'Specialist'. Below the summary is a table for 'Awarded Funding Proposals' with columns for 'ID', 'Name', 'Principal Investigator', and 'Status'. The first row has 'FF000362', 'Smoke Test NM Patch 3/8/19', 'Natalie West', and 'Awarded'. Below this is a table for 'History' with columns for 'Award Checkpoint', 'Attachments', 'Multi-reviewer', 'Child Awards', 'Subawards', 'Related Projects', 'Substitutions', 'Financial Compliance', 'Funding Allocations', 'Tasks', 'Reviews', and 'Comments'. The 'History' table has several rows with 'Award Change Approval' activities. On the left side, there is a sidebar with various actions, including 'Request Advance Account', which is highlighted with a red arrow.

6. Once in the 'Advance Account' form answer all of the questions presented, and click 'Ok':



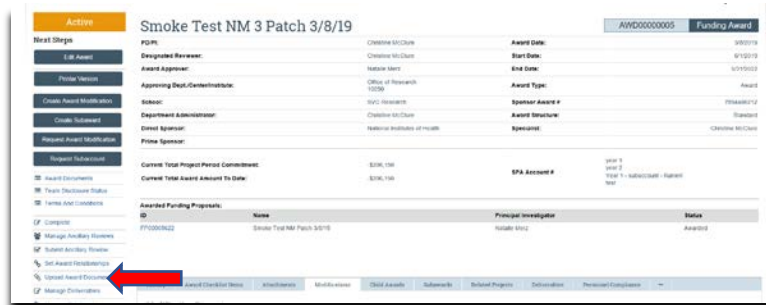
The screenshot shows the 'Advance Account' form. At the top, there is a disclaimer: 'By submitting this form, I certify to the best of my knowledge, that the information contained is true and correct. In the event that the award is not received, or it does not coincide with the anticipated budget period, I understand that any cost incurred will be the responsibility of my School/Department.' Below this are two questions: 'Is the reason for this request solely for the purposes of pre-award spending?' with radio buttons for 'Yes' and 'No', and 'If No, please explain:' with a text area containing 'PI would like to begin the work while the agreement is being negotiated.' Below these are three more questions: 'Does your project involve any of the following regulatory components (If the approvals are pending, please explain why the project must start, and restrict all costs related to the performance of that activity):' with radio buttons for 'Yes' and 'No' for 'Human Subjects?', 'Vertebrate Animals?', and 'Hazardous Materials/Equipment?'. Below these is a question: 'Please provide the account number to be charged in the event the award is not received, or the budget period does not coincide with the period:' with a text box containing '147959'. At the bottom, there is a 'Comments:' text area and a 'Documents:' section with an '+ Add' button and the text 'There are no items to display'.

What should be Attached?

1. Any other school-specific required documents
2. Compliance Approvals (if applicable)

Where do I attach the documents?

Documents should be attached in the award workspace using the ‘Upload Award Documents’ activity:



What's Next?

1. The Specialist receives a notification of the ‘Advance Account’ submission
2. If the ‘Advance Account’ is approved the Specialist will ‘Approve’ the ‘Advance Account’ and begin setting up the new award.
3. The Specialist will contact the department administrator when the new award is established.
4. The Specialist and the Department will use their respective Quick Guides for ‘Creating a New Award’ to complete the award activation process. To access the Quick Guides, click [here](#).