

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

Please note:

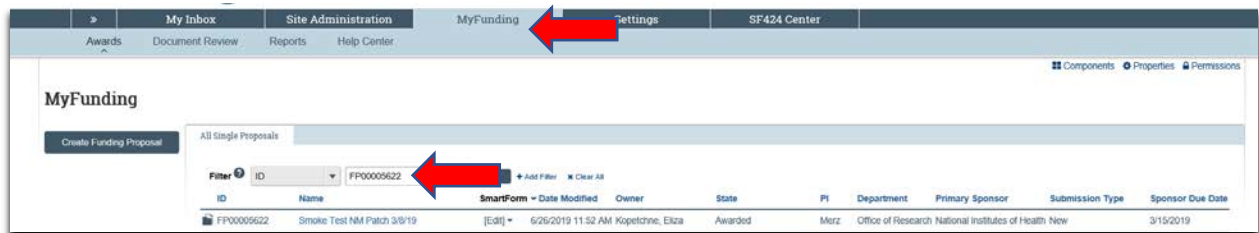
1. **Advance Accounts can be requested on both a funding proposal (that is in a 'Pending Sponsor Approval' state) and on an award (that is in a 'Draft' state).**

Examples:

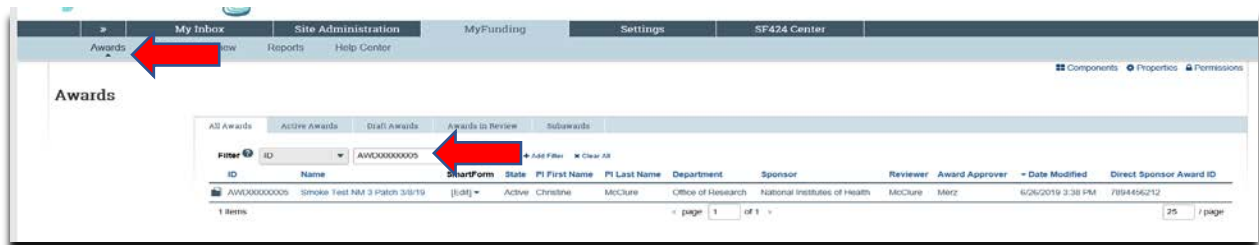
1. The Notice of Award (NOA) has not yet been received and the Principal Investigator would like to begin working on the project.
2. An incoming foundation agreement is in negotiations, but the Principal Investigator would like to begin working on the project.

Where to Start

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

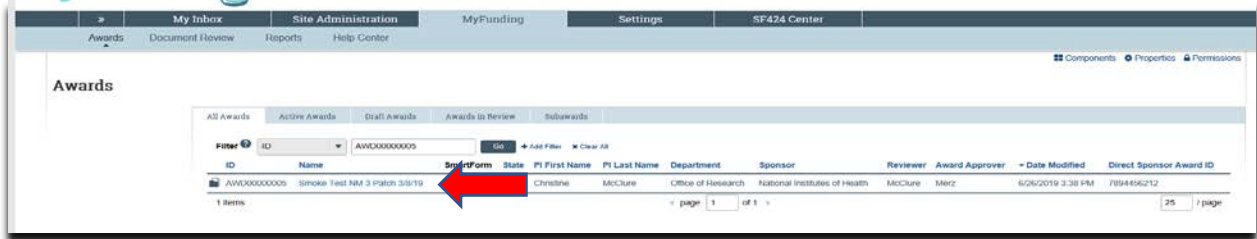


3. If the 'Advance Account' was requested on an Award, search for the record under the 'Awards' tab:

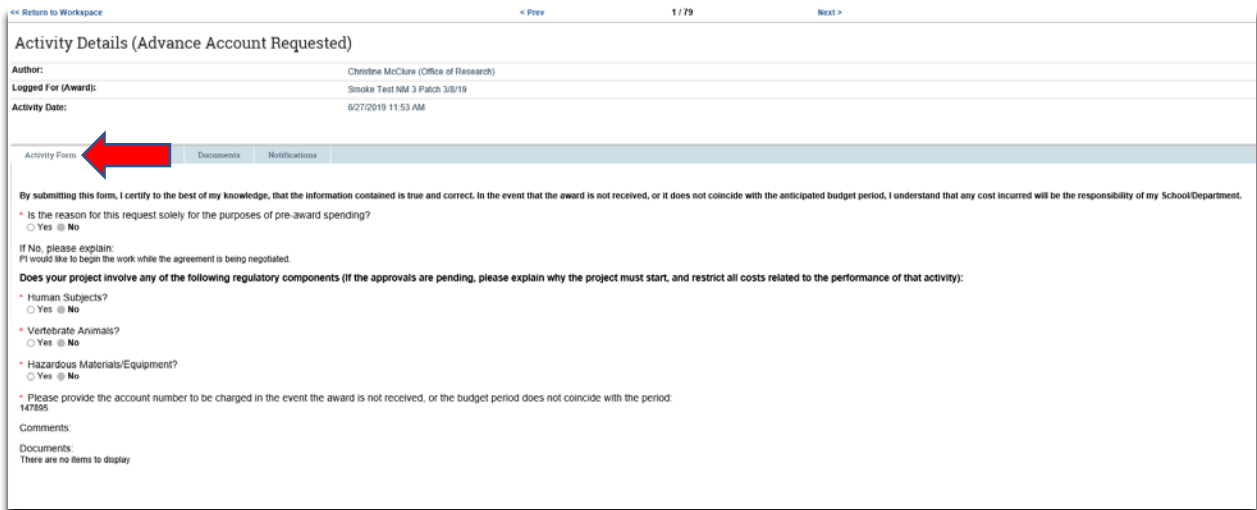
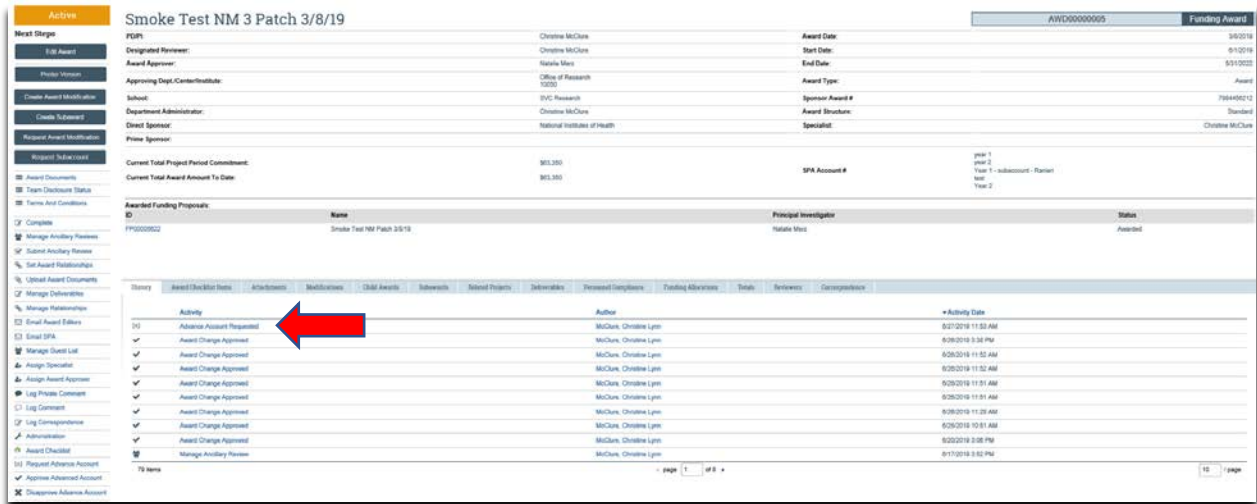


4. Click on the 'Name' of the project:

Specialist-Approving an Advance Account




5. Once in the records workspace, click on the 'Request Advance Account' activity in the 'History' to review the 'Advance Account Request':



6. Once the review is complete, click 'Return to Workspace':

Specialist-Approving an Advance Account

<< Return to Workspace  < Prev 1 / 79 Next >

Activity Details (Advance Account Requested)

Author: Christine McClure (Office of Research)
Logged For (Award): Smoke Test NM 3 Patch 3/8/19
Activity Date: 6/27/2019 11:53 AM

Activity Form | Property Changes | Documents | Notifications

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.

Yes No
 Is the reason for this request solely for the purposes of pre-award spending?

If No, please explain:
 I'll would like to begin the work while the agreement is being negotiated.

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):

- Yes No
Human Subjects?
- Yes No
Vertebrate Animals?
- Yes No
Hazardous Materials/Equipment?

Yes No
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:
147895

Comments:
 Documents:
 There are no items to display

7. If the 'Advance Account' is approved, click 'Approve Advance Account'. If the 'Advance Account' is not approved, click 'Disapprove Advance Account':

Active **Smoke Test NM 3 Patch 3/8/19** AWD00000005 Funding Award

Next Steps:

- Final Award
- Final Human
- Close Award Modifications
- Create Award
- Request Award Modifications
- Request Subcontract

Award Documents
 Team Disclosure Status
 Terms And Conditions
 Complete
 Manage Ancillary Review
 Submit Ancillary Review
 Set Award Relationships
 Upload Award Documents
 Manage Deliverables
 Manage Relationships
 Email Award Editors
 Email SPA
 Manage Guest List
 Assign Specialist
 Assign Award Approver
 Log Private Comment
 Log Comment
 Log Correspondence
 Administration
 Award Checklist
 Request Advance Account
 Approve Advance Account
 Disapprove Advance Account

Designated Reviewer: Christine McClure
Award Approver: Natalie Mero
Approving Dept./Center/Institute: Office of Research 1000
School: UNC Research
Department Administrator: Christine McClure
Direct Sponsor: National Institutes of Health
Prime Sponsor:
Award Date: 9/6/2019
Start Date: 9/1/2019
End Date: 5/31/2020
Award Type: Award
Sponsor Award #: 798440012
Award Structure: Standard
Specialist: Christine McClure


Current Total Project Period Commitment: \$63,360
Current Total Award Amount To Date: \$63,360
SPR Account #
 page 1
 page 2
 View 1 - subaccount - Partner
 View 2

Awarded Funding Proposals	ID	Name	Principal Investigator	Status
<input type="checkbox"/>	FP00000002	Smoke Test NM Patch 3/8/19	Natalie Mero	Awarded

History | Award Checklist Items | Approvals | Modifications | Child Awards | Subawards | Related Projects | Deliverables | Proposed Deliverables | Funding Agreements | Tools | Reviews | Correspondence

Activity	Author	Activity Date
<input type="checkbox"/> Advance Account Requested	McClure, Christine Lynn	6/27/2019 11:53 AM
<input checked="" type="checkbox"/> Award Change Approved	McClure, Christine Lynn	6/29/2019 9:36 PM
<input checked="" type="checkbox"/> Award Change Approved	McClure, Christine Lynn	6/29/2019 11:53 AM
<input checked="" type="checkbox"/> Award Change Approved	McClure, Christine Lynn	6/29/2019 11:52 AM
<input checked="" type="checkbox"/> Award Change Approved	McClure, Christine Lynn	6/29/2019 11:51 AM
<input checked="" type="checkbox"/> Award Change Approved	McClure, Christine Lynn	6/29/2019 11:51 AM
<input checked="" type="checkbox"/> Award Change Approved	McClure, Christine Lynn	6/29/2019 11:29 AM
<input checked="" type="checkbox"/> Award Change Approved	McClure, Christine Lynn	6/29/2019 10:51 AM
<input checked="" type="checkbox"/> Award Change Approved	McClure, Christine Lynn	6/29/2019 9:58 PM
<input checked="" type="checkbox"/> Award Change Approved	McClure, Christine Lynn	6/27/2019 9:52 PM

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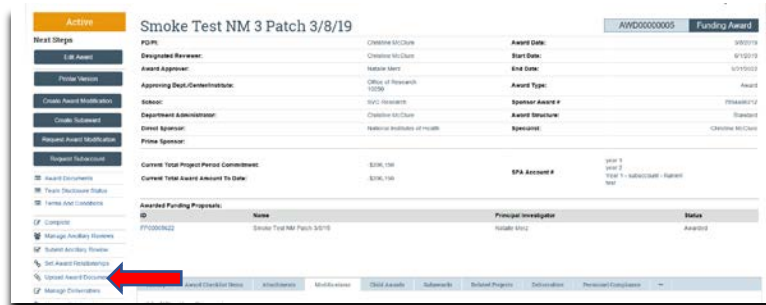
8. If the 'Advance Account' is approved, follow the Quick Guides for 'Creating a New Award' to complete the award activation process or complete the appropriate amendment/modification. To access the Quick Guides, click [here](#).

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 ‘Proposal Team’ or ‘Award Editors’ receive a notification of the ‘Advance Account’ approval/disapproval
2. 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](#).