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:

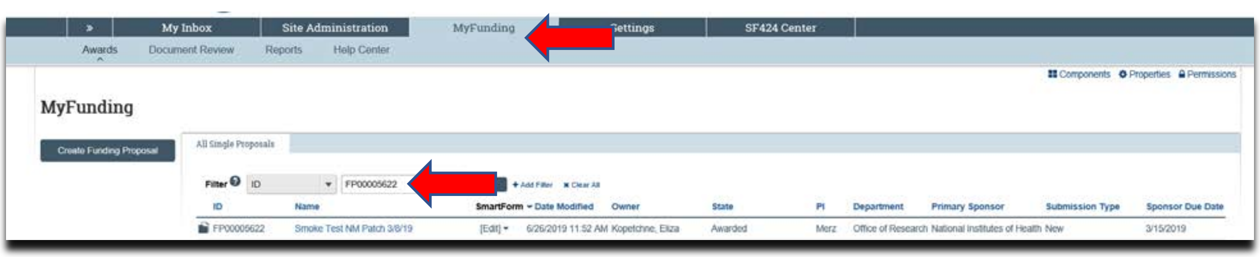
1. ***Advance Accounts can be requested on both a funding proposal (that is in a 'Pending Sponsor Approval' state) and on an award (that is in a 'Draft' state).***

Examples:

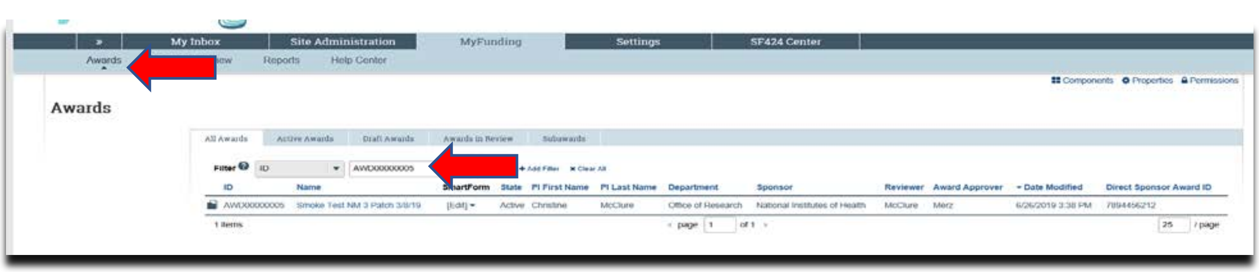
1. The Notice of Award (NOA) has not yet been received and the Principal Investigator would like to begin working on the project.
2. An incoming foundation agreement is in negotiations, but the Principal Investigator would like to begin working on the project.

Where to Start

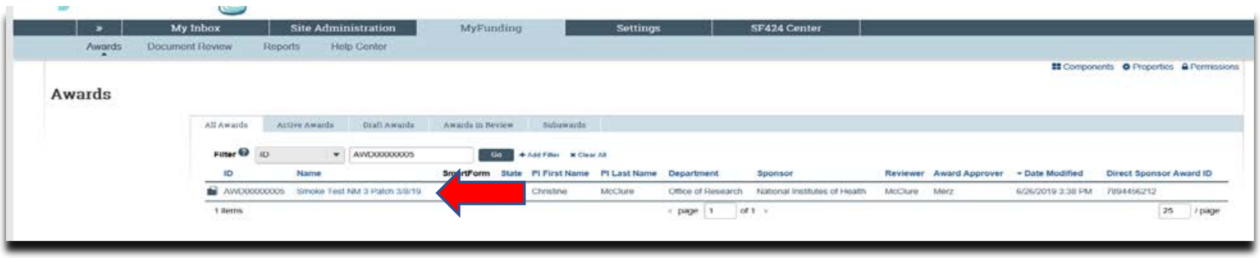
1. Log into MyFunding
2. If the 'Advance Account' is being requested on a Funding Proposal, search for the record under the 'MyFunding' tab:



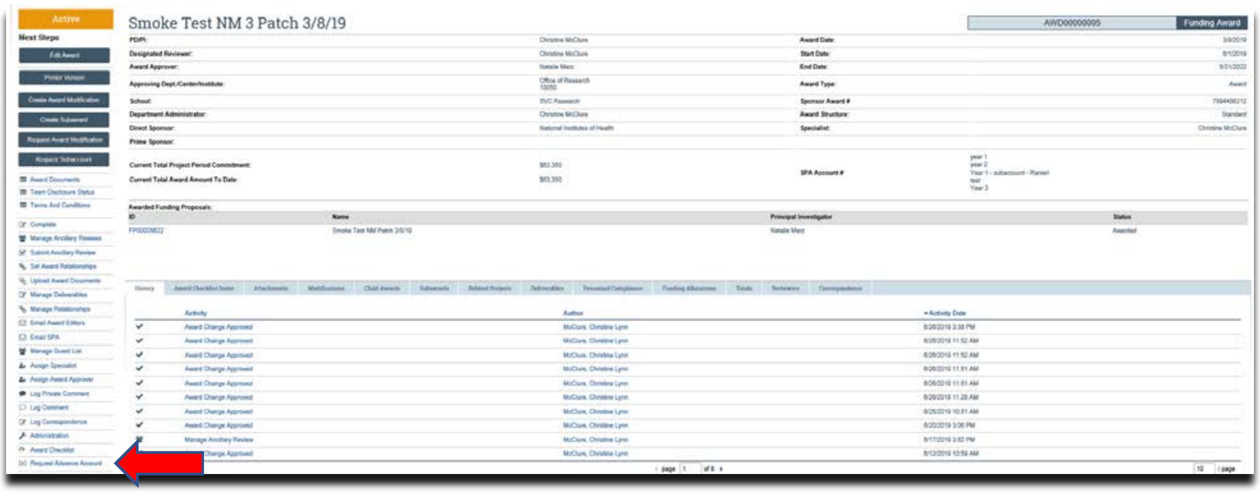
3. If the 'Advance Account' is being requested on an Award, search for the record under the 'Awards' tab:



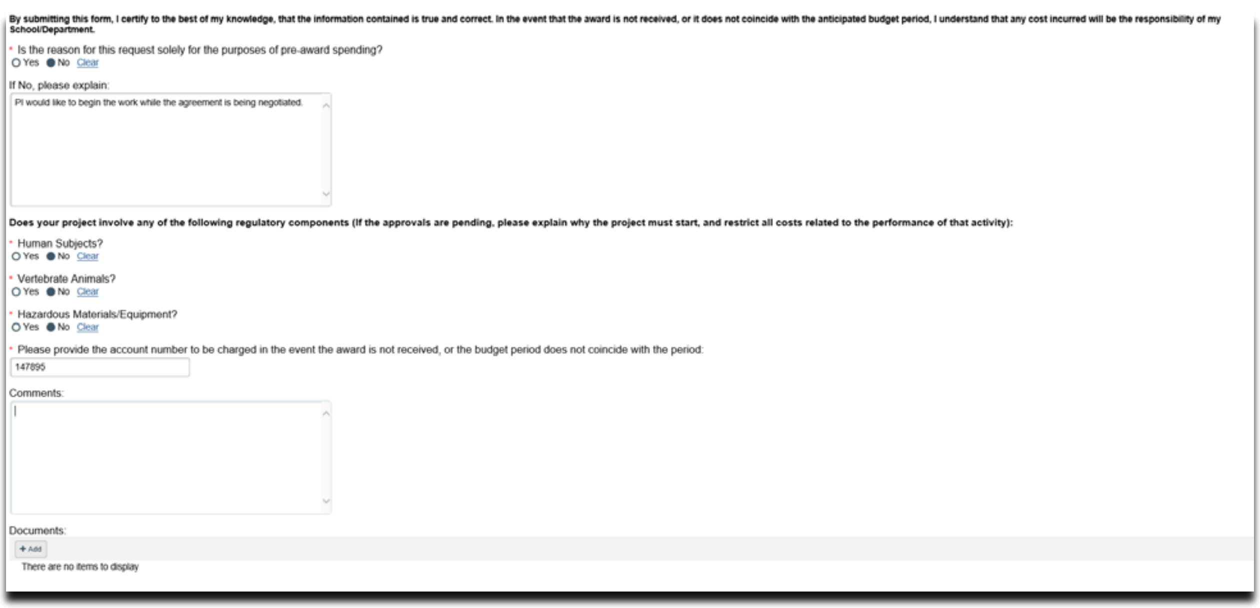
4. Click on the ‘Name’ of the project:



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



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



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.