



Approving and setting up an Advance Account for a New Award

1. On the funding proposal or award click Approve Advance Account. Provide comments, if necessary. Click OK.

Funding Proposal Approval Activity:

Approve Advance Account

Award Approval Activity:

Approve Advanced Account

2. Begin the Award SmartForms.

Edit Award

3. Authorize the Budget Allocation as an Advance Account.

*** Authorized:**

Authorized by Sponsor

Advance Account

Not Authorized

4. Complete the Award SmartForms.
5. Click Send Email Award to notify department that the Advance Account is available to review, and the Budget Reconciliation will need to be completed.

Send Email

6. Once notified that the SmartForms have been complete. Send the request for review.

 A rectangular button with a light blue background and a dark blue border. It features a right-pointing arrow icon on the left and the text "Submit for Designated Review" in a dark blue font.

7. When approval is received select Activate and Email SPA.

 A rectangular button with a light blue background and a dark blue border. It features a lightning bolt icon on the left and the text "Activate" in a dark blue font.

 A rectangular button with a light blue background and a dark blue border. It features an envelope icon on the left and the text "Email SPA" in a dark blue font.