An **Advance Account** is used when the award is pending official notification from the sponsor or is in negotiation and we anticipate the agreement to be executed soon.

Pending Sponsor Review

Next Steps

View Funding Proposal

Printer Version

📋 COI Disclosure Status

👥 Manage Ancillary Reviews

🔗 Manage Relationships

⚙ Manage Tags

🔲 Create Agreement

⬆ Add Attachments

📑 Copy

📤 Export Budget to Subaward PDF

➤ Send Grants Status Update ❶

➤ Send Email

👥 Manage Access

Requesting an Advance Account (At-Risk Preliminary) – Quick Guide

❶ Users designated as the Admin Contact, PI or study staff with edit rights can navigate to proposals in the Pending Sponsor Review status and select the Send Grants Status Update activity. The Send Grants Status Update window opens. (*Send Grants Status Update can only be used once. If is not available, utilize the Send Email activity.*)

❷ Choose Award Anticipated as the Grants status.

❸ In the Comments, please indicate that you are requesting an Advance Account setup. OSP will require details on the anticipated award. Please provide the start and end dates requested. Advance Accounts cannot be created for longer than a 6-month period.

❹ In the Documents section, click Add. Attach any relevant documents to support your request.

❺ Click Ok. This will send an email to your Specialist so they can begin the process of creating the Advance Account.

Proposal Status Confirmation

Note to Submitting Schools: If you are the named Specialist on the proposal when the Send Grants Status Update is used, the FP will show up in your Dashboard with the status Proposal Status Confirmation. Reassign the Specialist to the OSP Sr. Admin for your portfolio (see here) to start the Award process. Please notify the Specialist via the Send Email activity.

Award in Process: If your Funding Proposal has the status Award Notification Received, please use the Send Email activity to email your Specialist to request an Advance Account. The Award is already in process.

Award Notification Received

Execute "Send Grants Status Update" on FP00000199 - Google Chrome

🔒 mpclkuvastage.huronclick.com/GrantsTest/sd/ResourceAdministration/Activity/fo...   FF4D6203545!

Send Grants Status Update

1. Grants status: ❷
- ● Award Anticipated
- ○ JIT Info Requested
- ○ Not Funded
- ○ Withdraw Submission (Proposal Not Reviewed)
- ○ Award Received
- ○ other
- Clear

2. Comments: ❸

Award anticipated. Documentation attached. Start date 7/1/2022 for 6 month period.

3. Documents:
[+ Add] ❹

Name
📄 Email with Sponsor about Pending Award(0.01)   ⋯

❺

OK

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