This document is intended for the Central Office Award Setup Team (AST) and Departments.

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Advance Account Setup

Under limited circumstances, PIs may request authorization to spend funds in support of a sponsored program in advance of receiving a notice of award from the sponsor. Anyone listed as a **Department Administrator** or under **Submitting Department Contacts** can Request an Advance Account on behalf of the PI.

**Request Advance Account (Submitting Department)**

Once it has been confirmed that funding is anticipated, (reference the **Status of Award** guide):

1. Under My Current Actions, click **Request Advance Account**.
2. Complete all required fields to include whether pre-award spending is being requested.
3. Add comments and click **OK**.
   
   **Note:** Supporting documentation should have been provided upon execution of the Funding Anticipated activity.

4. The state of the Project will change to **Advance Account Requested**.
   
   **Note:** The request will now be routed to the designated PD/PI for signature/approval.
Advance Account Approval (only the PI can approve)

Once the account has been routed to the PI:

1. Under Activities, click Approve or Decline Advance Account Request.

2. Select Approved.
   
   Note: If the request is declined, the state of the project would return to Award Anticipated.

3. Add comments.

4. Click OK.

5. The state of the project will change to Advance Account.
New Funding Award ( Advance Account)

Once the project has been set to Advance Account, the Central Office AST would have the ability to execute the New Funding Award activity. The information required for smart form completion will be very minimal.

New Funding Award (Central Office AST)

From the state of Advance Account:

1. Click the New Funding Award tab.

2. Review and Save the information within the smart form(s). Click Continue to move through the documents.

3. Once the smart form review is complete, click Finish.

4. The state of the project will change to Draft.
Pending Account Setup

Once an award reaches the state of Pending Account Setup for an Advance Account, the Central Office AST must wait until they receive the Oracle Cloud Award and Primary Project Numbers before they can set the Advance Account.

Pending Account Set Up (Central Office AST)

From the state of Draft:

1. Click the **Pending Account Setup** tab.
2. Include the Oracle Cloud **award number**; include the Oracle Cloud primary project number.
3. Add comments.
4. Click **OK**.
5. The State of the project will change to Pending Account Setup.

**Note**: You should now see this information reflected under Account Information.
Set Advanced Account

Once the Oracle Cloud Award and Primary Project Numbers are received, the Central Office AST would set the Advance Account.

Set Advanced Account (Central Office/AST)

1. Under Activities execute **Set Advance Account**.
2. The Oracle Cloud award number and primary project number should now appear.
3. Add comments.
4. Click **OK**.
5. The state of the project will change to **Advance Account**.

**Note:** Central Office AST should now assign ownership to the Central Office GS and the next step would be to Complete the Award Setup upon receipt of the official Notice of Award.

Complete Award Setup (Central Office/GS)

Once the GS is given ownership:

6. Upon receipt of the official NOA, under Activities, execute **Complete Account Set Up**.
7. Provide the **Award** information.
8. Add comments.
9. Attached the **NOA** and click Ok.
10. The state of the award will change to **Draft**.

**Note:** The Grant Specialist will now pass ownership back to the Award Setup Team at which time the Award Setup Team will complete the award set up process.