

Research Administration & Proposal Submission System (RAPSS) Advance Account Setup Quick Reference Guide

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.

Current State

Award Anticipated

View Funding Proposal

Printer Version

View Differences

View SmartForm Progress

New Document Review

My Current Actions

Request Advance Account



NOTE: This request may be initiated by any of the individuals listed below:

Submitting Department Contacts:

Name
Alfonse Alvaro
Charnel Bohn
Gary Brewer
Jamie Carr
John Drudy
Marc Gartenberg
Celine Gelinis
Rosetta McCamery
James Theis

* Expected Start Date:

* Expected End Date:

* Will pre-award spending be requested?
 Yes No [Clear](#)

* Primary Unit/Division/Organization (UDO) Number:
 [Select...](#)

* Location Number (4-digits):

* Fund Type Number (3-Digits):

* Business Line Number (4-digits):

* Activity Number (4-digits):

* Backup Unit/Division/Organization (UDO) Number:
 [Select...](#)

* Financial Management System (Oracle Cloud) Backup Project Number:

* Comments:

* Supporting Documentation (required):

Add

Document

Upload Revision View noa(0.01) [Delete](#)

Attachments:

Add

Document

There are no items to display

[OK](#)

Current State

Advance Account Requested

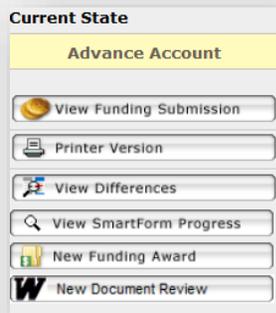
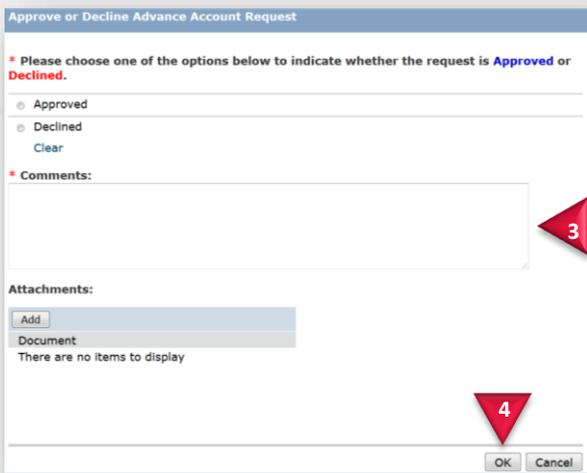
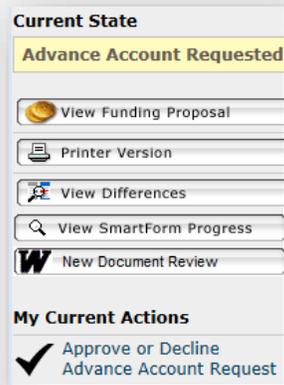
View Funding Proposal

Printer Version

View Differences

View SmartForm Progress

New Document Review



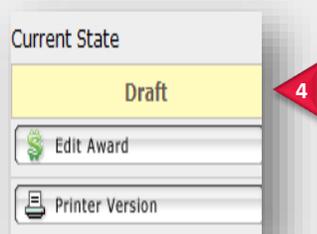
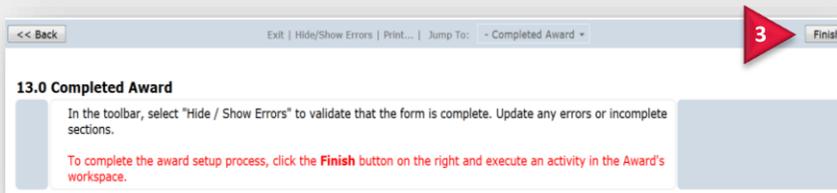
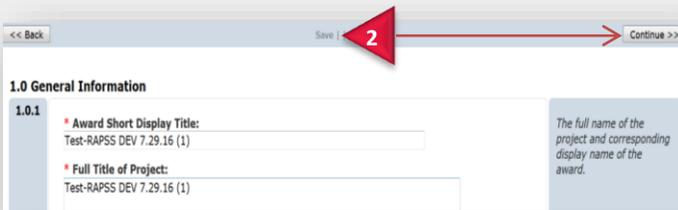
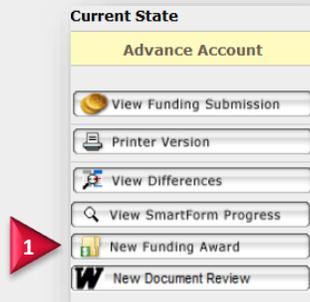
Advance Account Approval (only the PI can approve)

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.

Current State

Draft

- Edit Award
- Printer Version
- Create Subaward
- New Continuation
- Award Documents
- Terms And Conditions

Activities

- Pending Account Setup**



Pending Account Setup

1.0 * Financial Management System (Oracle Cloud) Award Number:

2.0 * Financial Management System (Oracle Cloud) Primary Project Number:



3.0 * Comments:

4.0 attachments:

Add Document

There are no items to display

OK



Current State

Pending Account Setup

- View Award
- Printer Version



Award Information		Compliance & Certifications	Contacts and Reviewers
ACCOUNT INFORMATION			
Additional Project Accounts Required:	No		
Primary Unit/Division/Organization (UDO):	76051351535		
Backup Unit/Division/Organization (UDO):	45067558108		
Oracle Cloud Award Number:	1200017		
Primary Account Number:	1200018		
Backup Account Number:	1200016		

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.

1 Activities

- Return to Central Office Review
- Set Advance Account**

2 **1.0** Financial Management System (Oracle Cloud) Award Number: 1200017

2.0 Financial Management System (Oracle Cloud) Primary Project Number: 1200018

3.0 * Comments:

4.0 attachments:

Document

There are no items to display

OK **4**

Current State

Advance Account

View Funding Submission

Printer Version

Activities

Complete Award Setup

Current State

Draft

Edit Award

Printer Version

Create Subaward

New Continuation

Complete Award Setup for Advance Account

Execution of this activity will transition the award back to the "Draft" state for completion of the award set-up. In addition, the associated parent funding proposal will be transitioned to "Award Notification Received".

* Sponsors Award ID:

* Notice of Award Date:

* Total Award Amount: \$0.00

* Comments or notes for this award:

* Sponsor Award Documents:

Document

There are no items to display

Comments for history log:

If available, please include any other attachments that support this action.

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.