

# Funding Proposal (FP) Advanced Account Request and Approval Quick Guide



## Advanced Account Request

Use the **Update Project Status** activity to notify your Grants Specialist of the sponsor's intent to fund the project or the contracting party's intent to issue a partially executed agreement. The *initial* advance account request can only be made when the Funding Proposal (FP) is in the state of **Award Anticipated**.

See also: [RAPSS-Funding Proposal \(FP\) Update Project Status Quick Guide.pdf](#)

### Step 1: Locate the FP

From the **Dashboard**, locate the FP record in the **FP: Determination Required** tile:

See also: [RAPSS-General-Dashboard Quick Guide.pdf](#)

### Alternate method to locate the FP

From the **Grants** tab, locate the FP record in the **Award Anticipated** tile

### Step 2: Request Advance Account

The request may be initiated by anyone on the project team.

- PD/PI
- Mentor
- Department Pre-award Contact
- Department Post-award Contact
- Individuals granted Read/Edit access

From **My Activities** select **Request Advance Account**

The screenshot shows the RAPSS system interface. At the top, there are navigation tabs: My Dashboard, Home, Grants, and Award. The 'My Dashboard' tab is active, showing a 'RESEARCHER DASHBOARD' with a 'FP: Determination Required' tile. A red arrow labeled '1a' points to the 'My Dashboard' tab, and another red arrow labeled '1b' points to the 'FP: Determination Required' tile. Below this, there is a table of 'Items Requiring Action' with columns for ID, Name, PD/PI First Name, PD/PI Last Name, Primary Sponsor, and Submitting Department. A red arrow labeled '1c' points to the 'FP: Determination Required' tile. The 'Grants' tab is also shown, with a 'Funding Projects' section. A red arrow labeled '1a' points to the 'Grants' tab. Below this, there is a table of 'FP - Award Anticipated' with columns for ID, Name, Direct Sponsor, School, Administering Department, Principal Investigator First Name, Principal Investigator Last Name, Project State, and State Entry Date. A red arrow labeled '1c' points to the 'Award Anticipated' project state. The 'Example Proposal 071323' is shown, with a red arrow pointing to the 'Award Anticipated' state in the project lifecycle diagram. The 'Request Advance Account' activity is highlighted in the 'My Activities' section, with a red arrow labeled '2' pointing to it.

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## Step 3: Provide the information and submit for approval.

Provide the information requested on the activity.

- 3a:** Ensure the project start and end dates are correct
- 3b:** Indicate if pre-award spending is required (must be in accordance with sponsor guidelines). If you are unsure, please consult with your grants specialist.
- 3c:** Indicate the number of accounts required and add the accounts. The number of accounts required **must** match the number of accounts listed.
- 3d:** Indicate the type of account to be established.
- 3e:** Leave the account numbers blank. RFS will assign them.
- 3f:** Provide the chart of accounts information
- 3g:** Provide the F&A chart of accounts information
- 3h:** Identify the Oracle PD/PI and Project Manager

Click **OK** to submit the request for approval. A notification will be sent to those individuals identified as department approvers and department administrators. It is up to local business practice who should review and approve the request.

### Note:

If you receive this error message, the number of accounts listed does not agree with the number of accounts requested (**see 3c**).

The screenshot shows the 'Request Advance Account' form. On the left, there are several input fields: 'Expected Start Date' (10/1/2023), 'Expected End Date' (9/30/2028), 'Will pre-award spending be requested?' (Yes selected), 'Enter the Pre-Award Spending Start Date' (07/01/2023), and 'How many accounts are required?' (2). Below these is a table for 'Financial Accounts' with columns for Account Type, Oracle Cloud Award Number, and Oracle Cloud Project Number. On the right, the 'Account Information' section contains a list of fields: 1. Account Type (Project Account selected), 2. Oracle Award Number, 3. Oracle Project Number, 4. Unit/Division/Organization (UDO), 5. Location, 6. Fund Type, 7. Business Line, 8. Activity Number, 9. F&A Credit Unit/Division/Organization (UDO), 10. F&A Credit Location Code, 11. F&A Credit Business Line, 12. Oracle Project PD/PI, and 13. Oracle Project Manager. Red callout boxes labeled 3a through 3h point to these fields: 3a points to the start/end dates; 3b points to the pre-award spending checkbox; 3c points to the 'Add' button and the 'How many accounts are required?' field; 3d points to the 'Project Account' radio button; 3e points to the 'Oracle Award Number' field; 3f points to the 'Business Line' field; 3g points to the 'F&A Credit Business Line' field; and 3h points to the 'Oracle Project Manager' dropdown.

Could not execute the Request Advance Account activity due to one or more errors:

- Number of Financial Accounts listed: 1**
- Number of Requested Accounts: 2**

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## Advanced Account Request Approval

The request may be approved by those individuals designated as:

- Department Administrator
- Department Approver

All individuals identified as such for the department will receive notification that there is a pending Advance Account Request to review and complete. **Local business practice should determine who is designated to review and approve the request** and who are the designated alternates. Only one individual is required to take action.

### Step 1: Click the link in the email

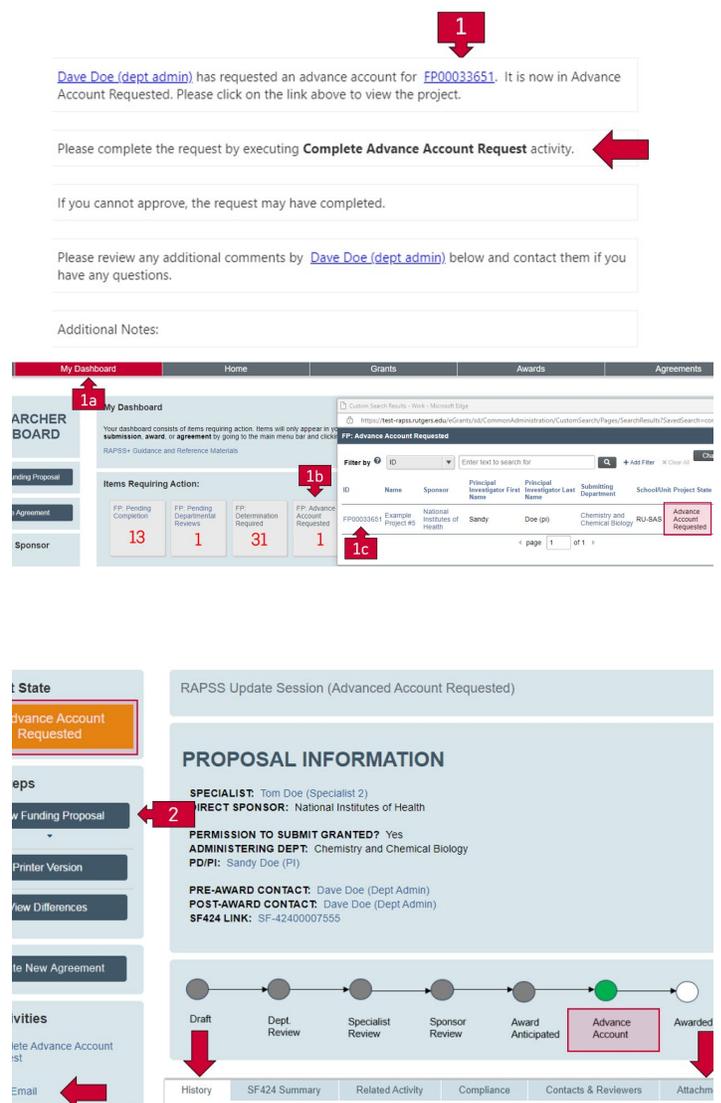
Click the link in the RAPSS email notification that you received to go directly to the record. If you are not logged into the system, you will be prompted to login with your Rutgers NetID first.

### Alternate method to locate the FP

From the **Grants** tab, locate the FP record in the **FP: Advance Account Requested** tile

### Step 2: Review the request

Once in the record, click **View Funding Proposal** to review the information provided in the forms. The **History** tab displays a history of actions and taken up to this point. Documents related to the project may be reviewed in the **Attachments** tab. The remaining tabs contain additional information related to the project. If you have any questions regarding the review, the **Send Email** activity may be used to initiate an email to a member(s) of the project team. Initiating an email from within the system will record the comments related to the activity so they are visible to all. This will assist others, so they know any potential issues have been identified and addressed.



**1**

[Dave Doe \(dept admin\)](#) has requested an advance account for [FP00033651](#). It is now in Advance Account Requested. Please click on the link above to view the project.

Please complete the request by executing **Complete Advance Account Request** activity.

If you cannot approve, the request may have completed.

Please review any additional comments by [Dave Doe \(dept admin\)](#) below and contact them if you have any questions.

Additional Notes:

**1a**

**1b**

**1c**

**2**

My Dashboard Home Grants Awards Agreements

ARCHER BOARD

Dashboard

Filter by ID Name Sponsor Principal Investigator First Name Principal Investigator Last Name Submitting Department School/Ink Project State

ID	Name	Sponsor	Principal Investigator First Name	Principal Investigator Last Name	Submitting Department	School/Ink	Project State
FP00033651	Example Project #	National Institutes of Health	Sandy	Doe (PI)	Chemistry and Chemical Biology	RJ-SAS	Advance Account Requested

Items Requiring Action:

FP: Pending Completion	FP: Pending Departmental Review	FP: Determination Request	FP: Advance Account Requested
13	1	31	1

State: RAPSS Update Session (Advanced Account Requested)

PROPOSAL INFORMATION

SPECIALIST: Tom Doe (Specialist 2)  
DIRECT SPONSOR: National Institutes of Health

PERMISSION TO SUBMIT GRANTED? Yes  
ADMINISTERING DEPT: Chemistry and Chemical Biology  
PD/PI: Sandy Doe (PI)

PRE-AWARD CONTACT: Dave Doe (Dept Admin)  
POST-AWARD CONTACT: Dave Doe (Dept Admin)  
SF424 LINK: SF-4240007555

Draft Dept. Review Specialist Review Sponsor Review Award Anticipated **Advance Account** Awarded

History SF424 Summary Related Activity Compliance Contacts & Reviewers Attachm

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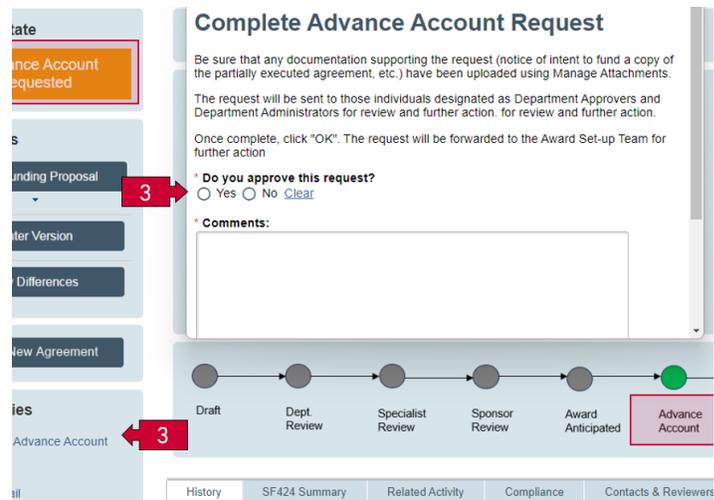
## Step 3: Complete the request

To finalize the request, click on the **Complete Advance Account Request** activity in the FP workspace.

**Yes:** Approving the request will complete the review and transition the FP to a state of **Advance Account**.

A notification will be sent to the pre-award setup team to begin processing the request.

**No:** Declining the request will leave the FP in a state of **Award Anticipated**, signifying you are electing to wait for the formal Notice of Award or fully executed agreement to be received.



The screenshot shows the 'Complete Advance Account Request' form. On the left sidebar, the 'Complete Advance Account Request' activity is highlighted with a red box and a red arrow labeled '3'. The main content area contains instructions: 'Be sure that any documentation supporting the request (notice of intent to fund a copy of the partially executed agreement, etc.) have been uploaded using Manage Attachments. The request will be sent to those individuals designated as Department Approvers and Department Administrators for review and further action. Once complete, click "OK". The request will be forwarded to the Award Set-up Team for further action.' Below the instructions, there is a question: '\* Do you approve this request?' with radio buttons for 'Yes' and 'No' and a 'Clear' link. A 'Comments:' text area is also present. At the bottom, a submission status flowchart shows stages: Draft, Dept Review, Specialist Review, Sponsor Review, Award Anticipated, and Advance Account. The 'Advance Account' stage is highlighted with a red box and a red arrow labeled '3'. Below the flowchart, there are tabs for 'History', 'SF424 Summary', 'Related Activity', 'Compliance', and 'Contacts & Reviewers'.



The screenshot shows two 'My Activities' panels. The left panel has a red arrow labeled '3' pointing to the 'Complete Advance Account Request' activity, which has a checkmark. The right panel shows 'Send Email' and 'Copy Project' activities.



The screenshot shows the 'Current State' section with 'Advance Account' highlighted in a red box and a red arrow labeled '3'. Below it are 'Next Steps' (View Funding Proposal, Printer Version, View Differences, Create New Agreement) and 'My Activities' (Send Email, Copy Project, Manage Project Access). The 'PROPOSAL INFORMATION' section for 'Example Proposal 071323' includes: 'SPECIALIST: Tom Doe (Specialist 2)', 'DIRECT SPONSOR: National Institutes of Health', 'PERMISSION TO SUBMIT GRANTED? Yes', 'ADMINISTERING DEPT: Chemistry and Chemical Biology', 'PDI/PI: Sandy Doe (PI)', 'PRE-AWARD CONTACT: Dave Doe (Dept Admin)', 'POST-AWARD CONTACT:', and 'SF424 LINK: SF-42400007561'. Below this is the 'SUBMISSION STATUS' flowchart, which is identical to the one in the first screenshot, with 'Advance Account' highlighted in a red box and a red arrow labeled '3'.

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## Related Quick Guides

### Funding Proposal

- [RAPSS-Funding Proposal \(FP\) Proposal States Quick Guide.pdf](#)
- [RAPSS-Funding Proposal \(FP\) Workspace Quick Guide.pdf](#)
- [RAPSS-Funding Proposal \(FP\) Checklist.pdf](#)
- [RAPSS-Funding Proposal \(FP\) SF424 Quick Guide.pdf](#)
- [RAPSS-Funding Proposal \(FP\) Complete Dept Change Request & Specialist Change Request Quick Guide.pdf](#)
- [RAPSS-Funding Proposal \(FP\) Update Project Status Quick Guide.pdf](#)
- [RAPSS-Funding Proposal \(FP\) Complete JIT Request Quick Guide.pdf](#)
- [RAPSS-Funding Proposal \(FP\) Advanced Account Request and Approval Quick Guide.pdf](#)

### Department Reviewer

- [RAPSS-Funding Proposal \(FP\) Department Reviewer Quick Guide.pdf](#)
- [RAPSS-Funding Proposal \(FP\) Advanced Account Request and Approval Quick Guide.pdf](#)

## Additional Quick Guides

- [RAPSS-General-Manage Attachments Quick Guide.pdf](#)
- [RAPSS-General-Terminology Quick Guide.pdf](#)
- [RAPSS-General-Dashboard Quick Guide.pdf](#)