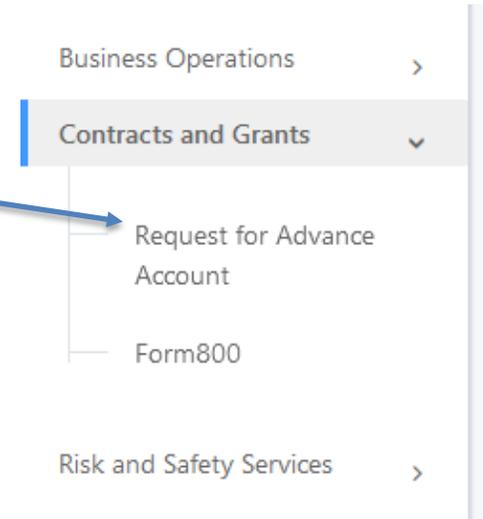


Contracts and Grants Workflow Automation Application: Advance Account

Advance Account

Login Here*: <https://wfa.ucanr.edu/>
 *First time logging in requires an invite be emailed to you first. If issues logging in, please first try search your emails from "invites@microsoft.com" for the invitation to access this application. If not found, please contact support@ou.ad3.ucdavis.edu.

- To Initiate/Submit a Form: Left menu -> select Contracts and Grants -> Advance Account
- To be used when you need to start incurring expenses prior to receipt of a fully executed contract or grant.
- Requires a firm commitment from the sponsor with the award amount and start date. If the start date is date of last signature, an advance account cannot be set up.
- Contact OCG for guidance to confirm if an advance account can be set up on your pending award.



Enter in the PI Name, Department, Unit Director, and requested project detail.

Submitter* <input type="text" value="Kendra Rose"/>	Department* <input type="text"/>
Principal Investigator* <input type="text" value="Search more users"/>	Director* <input type="text" value="Search more users"/>
ANR Grant Tracking System No. <input type="text"/>	Project Title* <input type="text"/>
Sponsor* <input type="text"/>	Sponsor Award No. <input type="text"/>

- **If the PI is the same person as the submitter of the form, the following PI certification will need to be checked as well:**

I certify that all necessary human subject, animal subject, and/or environmental health and safety approvals have been obtained prior to conducting work that requires such approvals and that funds will be available to cover expenses incurred for this project in the event the sponsor does not provide the funds requested (indicate fund source below).

- Check Yes if federal or federal flow thru
- Enter in the unrestricted fund source that will be used as the backup account in the event the pending award does not come through for any reason.

Please indicate if federal or federal flow through funds are being provided by sponsor of this project

Yes, funds from sponsor are federal and federal flow through funds

Unrestricted non-federal fund source* L-*

Award Dates: Start* End* Total Anticipated Award Amount:*
 \$

Advance Dates: Start* End* Total Advance Amount:*
 \$

Justification for Advance Account*

Sponsors written intent to fund the project

 Drag and drop files or click here

BOC/BUSINESS MANAGERS*

Save As Draft

Back Submit

- Enter the anticipated award start/end dates and award amount.
- Enter in the requested advance account dates and advance amount.
- Provide a justification for why the advance account is needed.
- Upload confirmation of the sponsor’s intent to fund the project such as an email or award letter. The documentation should confirm the award start date and award amount.
- Select your BOC or unit Business Manager.
- Click Submit.

- If the submitter is not the PI, the form will first route to the PI to provide the PI certification and approval.
- The form will then route to the Unit Director BOC for approvals.
- To Approve a Form: select the Pending Approvals menu.
- Click blue View button next to the applicable form.

Dashboard

ALL

Advance Filter

61
Tasks by me

5
Pending Approvals

3
To be claimed

2
Rejected

83
Completed by me

Date of Submission	TASK ID	FORM TITLE	SUBMITTER	CURRENT STAGE	ASSIGNED TO	STATUS	Action
02-24-2023 13:25	1770000	Form 800	Kendra Rose	Contracts and Grants	Kendra Rose	In Progress	View