

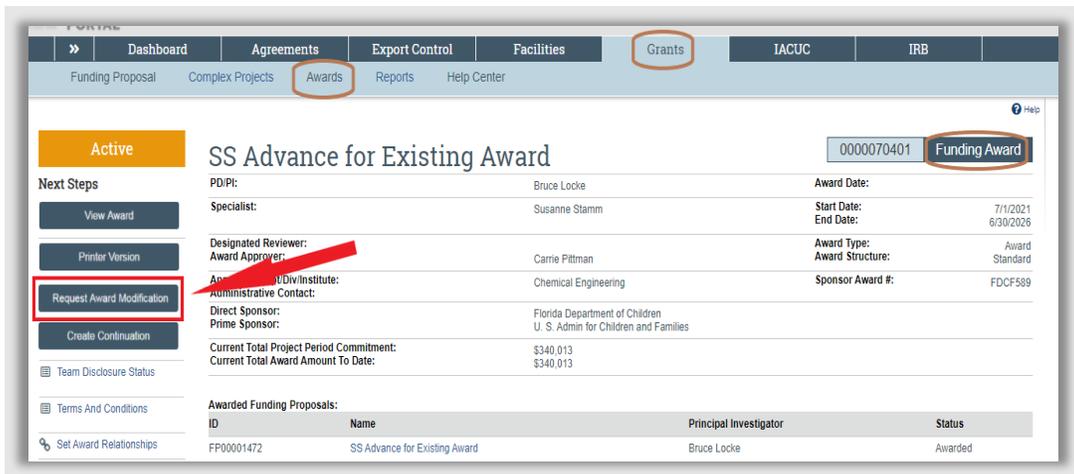
HOW TO REQUEST AN ADVANCE ON AN EXISTING AWARD

Award Modification Request

This guide shows how to create an Award Modification Request to request an advance on an existing award and submit it for review. (Typically, the PI or Study Staff requests modifications. Anyone with an Editor role on the award can do so).

To request an Advance on an Existing Award

1. From the Awards tab on the Grants page, open the award workspace that needs an advance.
2. From the award workspace, click **Request Award Modification**.



The screenshot shows the 'Request Details' smartform page for an award. The 'Request Award Modification' button is highlighted with a red box. A red arrow points to the 'Award Approver' field.

Awarded Funding Proposals:	
ID	Name
FP00001472	SS Advance for Existing Award

On the “Request Details” smartform page, enter one of the following advance types in Q1:

- Advance of Time Only
- Advance of Funds & Time
- Advance of Funds Only

Date requested auto-populates with current date. Provide details in Q3 for the advance being requested. The information required for approval is available in the “Award Modification Request Quick Sheet” located on the RAMP Grants Help Center tab. Upload the required supporting documents in Q4, then click “Finish.”

The screenshot shows the 'Request Details' section of a 'Creating New: Award Change Request' form. A red box highlights the 'Full description of requested changes' field with the text: 'Enter this information in Q3 as required for the advance type being requested.' A red arrow points from this box to the text area. To the right, a blue box lists the following information to be included in the 'Submit to Specialist' form:

- Amount requested for advance:
- Advance period requested:
- Backing (Dept, Fund, & Project ID#):
- Available Backing Funds:
- Existing advance? (Y/N):
- Cost-share in proposal? (Y/N):

- From the modification request workspace, click **Submit to Specialist**. On the Submit to Specialist form, include any additional optional comments, then click **OK**.

The screenshot shows the 'Advance of Time & Funds' workspace. The 'Draft' tab is active. A red box highlights the 'Submit to Specialist' button in the left sidebar, with a red arrow pointing to it. Below, the 'Submit to Specialist' modal is open, showing a '1. Comments:' text area and a '2. Supporting documents:' section. A red arrow points to the comments area, and another red arrow points to the 'OK' button at the bottom right of the modal.

The award modification request transitions to the Review state and appears in the assigned specialist's inbox.

NOTE: The Specialist and the Submitter are the only personnel that receive notifications on an AMR.

Award Modification

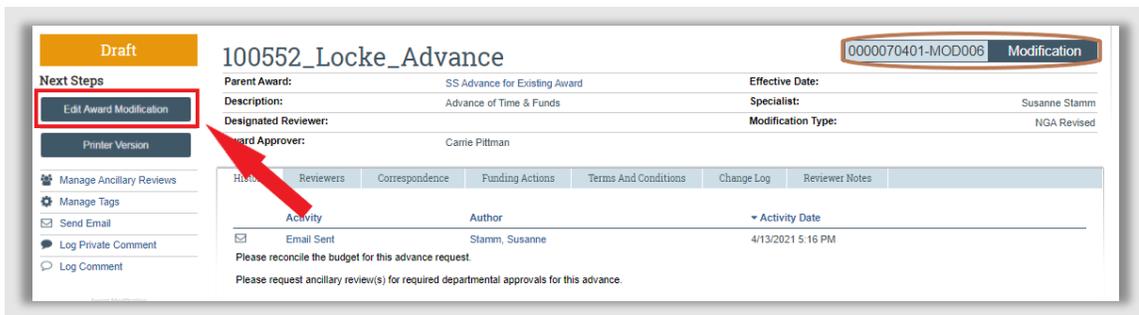
Department Edits:

Study Staff (PI/Dept Reps) will receive an email notification to reconcile the advance budget(s) and request ancillary reviews for departmental approval (if applicable).

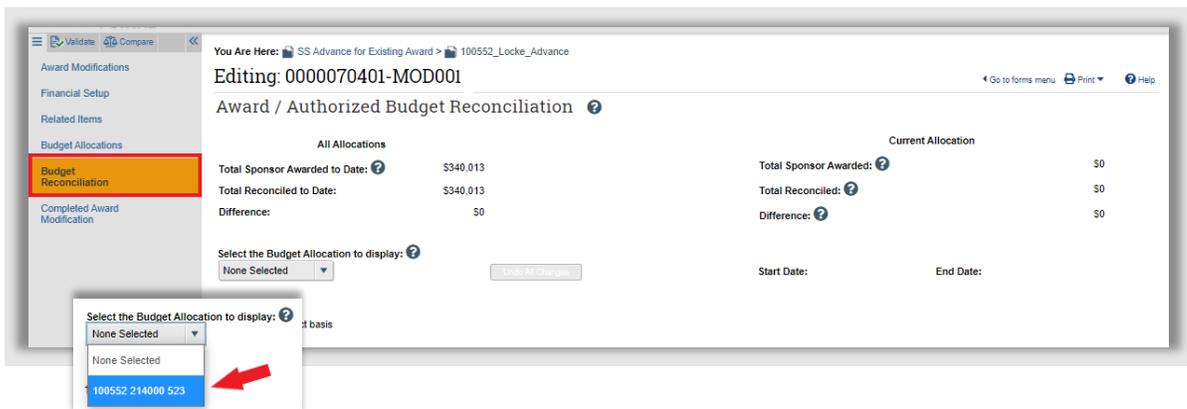
1. Click the link in the email notification to open the modification workspace.

NOTE: The award modification will not show up in the PI or study staff's "My Inbox" on the Dashboard. However, they can search for all modifications in "Draft" state on the Award Modifications tab under the Award menu to see draft modifications to which they have access.

2. On the award modification workspace, click the "Edit Award Modification" button.



3. Next, navigate to the "Budget Reconciliation" smartform page and click on the "Select the Budget Allocation to display:" drop-down arrow to select the budget(s) to be reconciled.



- In the adjustments column, insert the costs being requested for the advance until the Current Allocation "Difference" equals \$0, select the next budget in the "Select the Budget Allocation to display" drop-down list to be reconciled. Once all the budget(s) have been reconciled, click "Save" and "Exit."

Award / Authorized Budget Reconciliation

All Allocations

Total Sponsor Awarded to Date: \$340,013

Total Reconciled to Date: \$340,013

Difference: \$0

Select the Budget Allocation to display: 100552 214000 523 Undo All Changes

Current Allocation

Total Sponsor Awarded: \$629,514

Total Reconciled: \$340,013

Difference: \$289,501

Start Date: 7/1/2021 End Date: 6/30/2023

Budget Categories	Baseline	Rollup Adjustments	Adjustments	Active Allocation Total
Senior Personnel	SRPERS	\$93,499	\$0	\$93,499
Other Personnel	OTPERS	\$87,500	\$0	\$87,500
Equipment	EQUIP	\$50,000	\$0	\$50,000
Domestic Travel	DOTRAV	\$12,000	\$0	\$12,000
Foreign Travel	FOTRAV	\$0	\$0	\$0
Tuition	TUITO	\$11,114	\$0	\$11,114
Supplies	SUPL	\$25,000	\$0	\$25,000
Contractual Services	CONSV	\$18,000	\$0	\$18,000
Patient Care Costs	PCC	\$0	\$0	\$0
Subaward Direct < \$25,000	SUB<25	\$0	\$0	\$0
Subaward Direct > \$25,000	SUB>25	\$0	\$0	\$0
Rent	RENT	\$0	\$0	\$0
Other Expenses	OTHER	\$0	\$0	\$0
Partic. Support Tuition	PTSTUITN	\$0	\$0	\$0
Partic. Support Stipends	PTSTIP	\$0	\$0	\$0
Partic. Support Travel	PTTRAV	\$0	\$0	\$0
Partic. Support Subsistence	PTSUBS	\$0	\$0	\$0
Partic. Support Other	PTOTHR	\$0	\$0	\$0
Facilities and Administration	FACADM	\$42,900	\$0	\$42,900
Personnel Cost Share Only	PERSON	\$0	\$0	\$0
Total		\$340,013	\$0	\$340,013

† Included in Indirect basis

Exit Save Continue

Award Modifications

Financial Setup

Related Items

Budget Allocations

Budget Reconciliation

Completed Award Modification

All Allocations

Total Sponsor Awarded to Date: ? \$340,013

Total Reconciled to Date: \$629,514

Difference: -\$289,501

Select the Budget Allocation to display: 100552 214000 523 Make All Changes

Current Allocation

Total Sponsor Awarded: ? \$629,514

Total Reconciled: ? \$629,514

Difference: ? \$0

Start Date: 7/1/2021 End Date: 6/30/2023

Budget Categories	Baseline	Rollup Adjustments	Adjustments	Active Allocation Total	
Senior Personnel	SRPERS	\$93,499	\$0	\$96,304	\$189,803
Other Personnel	OTPEPS	\$87,500	\$0	\$90,125	\$177,625
Equipment	EQUIP	\$50,000	\$0	\$0	\$50,000
Domestic Travel	DOTRAV	\$12,000	\$0	\$12,120	\$24,120
Foreign Travel	FOTRAV	\$0	\$0	\$0	\$0
Tuition	TUITIO	\$11,114	\$0	\$11,225	\$22,339
Supplies	SUPL	\$25,000	\$0	\$25,250	\$50,250
Contractual Services	CONSV	\$18,000	\$0	\$18,180	\$36,180
Patient Care Costs	PCC	\$0	\$0	\$0	\$0
Subaward Direct < \$25,000	SUB-25	\$0	\$0	\$0	\$0
Subaward Direct > \$25,000	SUB>25	\$0	\$0	\$0	\$0
Rent	RENT	\$0	\$0	\$0	\$0
Other Expenses	OTHER	\$0	\$0	\$0	\$0
Partic. Support Tuition	PTSTUITN	\$0	\$0	\$0	\$0
Partic. Support Stipends	PTSTIP	\$0	\$0	\$0	\$0
Partic. Support Travel	PTTRAV	\$0	\$0	\$0	\$0
Partic. Support Subsistence	PTSUBS	\$0	\$0	\$0	\$0
Partic. Support Other	PTOTHR	\$0	\$0	\$0	\$0
Facilities and Administration	FACADM	\$42,900	\$0	\$36,297	\$79,197
Personnel Cost Share Only	PERSON	\$0	\$0	\$0	\$0
Total		\$340,013	\$0	\$289,501	\$629,514

† Included in Indirect basis

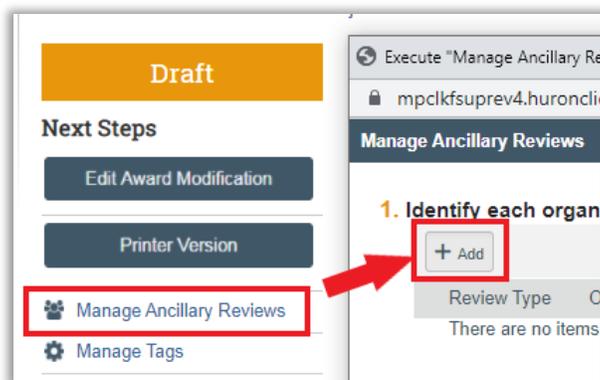
Exit
Save
Continue →

If the advance being requested is due to delay in receipt of the next increment of funding, skip to the “Send Email” section on page 9.

Request Ancillary Reviews, if applicable:

The Study Staff will request ancillary review(s) to obtain the required departmental approvals for the advance being requested, if applicable. Department approval is not required for incrementally funded continuation awards.

1. On the award modification workspace, click the “Manage Ancillary Reviews” activity.
2. On the “Manage Ancillary Reviews” page, click the [+Add] button.
3. On the “Add Ancillary Review” page, to select a department to perform the ancillary review, start typing the department ID in the Organization field and select from the list displayed, select “Advance Account” for the review type, and “Yes” for response required. Enter the advance request details as comments to provide sufficient information to the assigned ancillary reviewers to make an informed decision regarding the advance request. Add any supporting documents, then click “OK.”
4. You are returned to the “Manage Ancillary Reviews” page where the ancillary review is now displayed, click “OK.”



Add Ancillary Review

1. * Select either an organization or a person as reviewer:

Organization:

Person:

1. * Select either an organization or a person as reviewer:

Organization: 227000

ID	Organization	Org Parent
227000	Natl High Magnetic Field Lab	Natl High Magnetic Field Lab

2. * Review type:

Advance Account

3. * Response required?

Yes No [Clear](#)

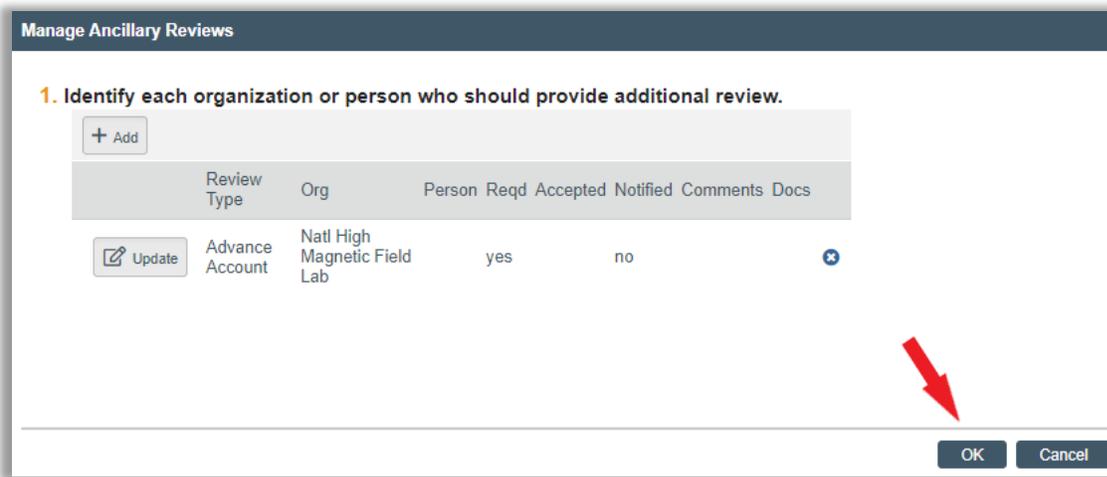
4. Comments:

5. Supporting documents:

Name

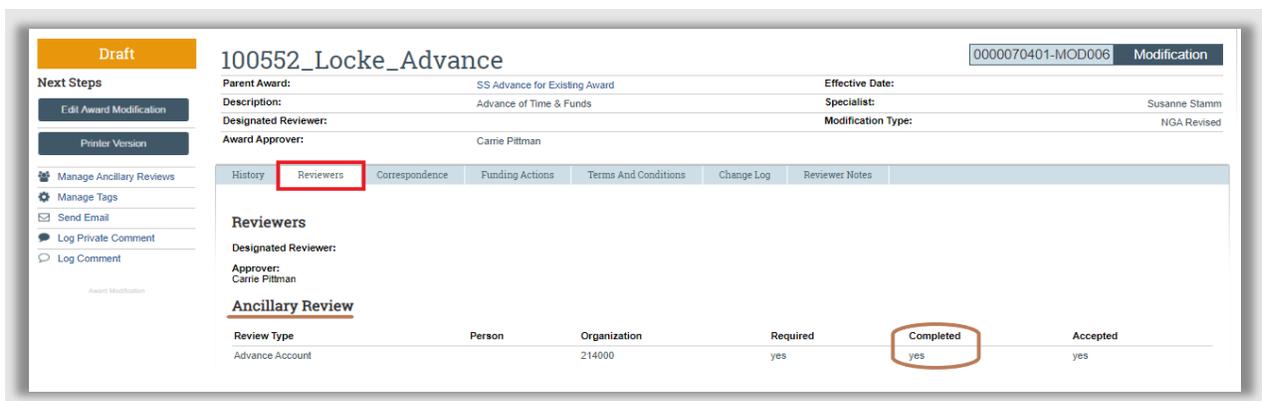
There are no items to display

* Required



NOTE: A notification is automatically sent to all individuals that have been assigned as an ancillary reviewer for the organization selected.

NOTE: Departmental processes determine who in the list of ancillary reviewers must approve ancillary reviews for that organization. To check to see if the ancillary review has been approved, on the award modification workspace, click the “Reviewers” tab, the ancillary review is approved if the “Completed” column indicates “yes.”



NOTE: A notification is sent to the assigned Specialist when an ancillary review has been completed.

Send Email:

To notify the assigned Specialist that department edits have been completed. A study staff member will click the “Send Email” activity. On the “Send Email” pop-up page, the study staff member will enter an email subject line in Q1, select Specialist and any other necessary recipients in Q2, complete the required fields then click “OK.”

Funding Proposal Co Send Email

... > Grants > Electron-Ion Collider Pro

Draft

Next Steps

Edit Award Modification

Printer Version

Manage Ancillary Review

Manage Tags

Send Email

Log Private Comment

Log Comment

Award Modification

1. * Email subject line:

2. * Select at least one group of recipients:

All team members

All editors

All readers

Specialist

Select any other recipient for this email: (Only editors and readers have access to the award modification.)

First Name	Last Name	E-Mail
There are no items to display		

3. * Comments to be included in the email:

4. Supporting documents:

+ Add

Name
There are no items to display

NOTE: An email notification is sent to the assigned Specialist.