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.

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

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.
4. 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.”
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: 

2. *Review type:
   - Advance Account

3. *Response required?
   - Yes
   - No
   - Clear

4. Comments:

5. Supporting documents:

6. *Required

[OK] [OK and Add Another] [Cancel]
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.”

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