

## Endorse an Advance Account request as a Pre-Award Spending Approver

Users with the **Pre-Award Spending Approver** role may endorse Advance Account requests for IPFs (Internal Processing Forms in [Cayuse SP](#)) in their unit.

- Note: Pre-Award Spending Approvers must also have **Proposal Data Access** to view the relevant IPF attachments.
- From the **Proposal Dashboard**, select **Advance Account Inbox**.
  - On the **Pre-Award Spending Approver Inbox** screen, click on the **Project Title** to download and view a PDF of the IPF.


The screenshot shows the Cayuse SP interface. On the left is the 'My Dashboard' sidebar with sections: 'Proposal Dashboard' (containing links for 'Start New Proposal', '5 My Proposals', 'Proposals In My Unit', and '1 Advance Account Inbox' which is highlighted with a red box and a red double arrow), and 'Award Dashboard' (containing links for 'My Awards' and 'Awards In My Unit'). The main content area is titled 'Pre-Award Spending Approver Inbox' and has two tabs: 'To Be Authorized' and 'Previously Reviewed'. Below the tabs is a table with columns 'Date Submitted' and 'Project Title'. The first row shows '08/11/2025' and '08/18/2025 Apple NSF', with the project title highlighted by a red box.

- To view the relevant IPF attachments, note the **Proposal Number** from the downloaded IPF and find the Proposal in the **Proposals in My Unit** tab of the **Proposal Dashboard**.

The screenshot shows the Cayuse SP interface. On the left is the 'Proposal Dashboard' sidebar with sections: 'Proposal Dashboard' (containing links for 'Start New Proposal', 'My Proposals', and 'Proposals In My Unit' which is highlighted with a red box and a red double arrow), and 'Award Dashboard' (containing links for 'My Awards' and 'Awards In My Unit'). The main content area is titled '>> Proposals In My Unit' and contains a message: 'Below is a list of proposals for units where you have been assigned Proposal Data Access. See [Research Contacts](#) for a complete listing of roles in your unit.' Below this is a table with columns: 'Submitted Date', 'Prop No', 'Lead PI', 'Project Name', and 'Sponsor'. The first row shows '08/11/2025', '25-1117' (highlighted with a red box), 'Charlie Apple', '08/18/2025 Apple NSF', and 'National Sci (NSF)'. The second row shows '102717 Testino Advance Account Routing' and 'NIH National'.

- Click on the **Prop No**. Then on the **Proposal Routing Status** screen, check attachments one of two ways to review the documents related to the Advance Account Request:
  - Either click the **Attachments** tab (indicated with a paperclip icon)
  - Or click the **Proposal** Number in the top left, then click on **Proposal Attachments** in the left column.

**Proposal Routing Status**

Proposal: **25-0296** 



Project: **A25-0029**

Lead PI: **Sreenija Muppalla**

Admin Unit: Center for Neuroscience

Project Title: Sreenija Testing Project

[View IPF](#)

Approvals Compliance Status History Advance Account Awards  

**IMPORTANT:** These attachments are where evidence of firm commitment from the sponsor should be saved.



**Step 5** is for Pre-Award Spending Approvers in **School of Medicine (SOM)** and **School of Veterinary Medicine (SVM)** departments only. All others proceed to **step 6**.

5. Enter the following note under the **Notes** tab (page icon) of the **Proposal Routing Status** screen:
 

“Advance Account Request is endorsed by the unit”. Then click **Add Note**.

  - a. While the **Pre-Award Spending Approver** for the SOM or SVM Dean’s Office is responsible for the remaining steps, it will speed the review/approval process if you reach out to let them know a Pre-Award Spending request is ready for their review.

[View IPF](#)

Approvals Compliance Status History Advance Account Awards  

Advance Account Request endorsed by department.

[Add Note](#)

6. To endorse or reject the request, return to the request in the **Advance Account Request Inbox** and select **Manage**.

My Dashboard More

**Proposal Dashboard**

[Start New Proposal](#)

5 [My Proposals](#)

[Proposals In My Unit](#)

1 [Advance Account Inbox](#) >>

**Award Dashboard**

[My Awards](#)

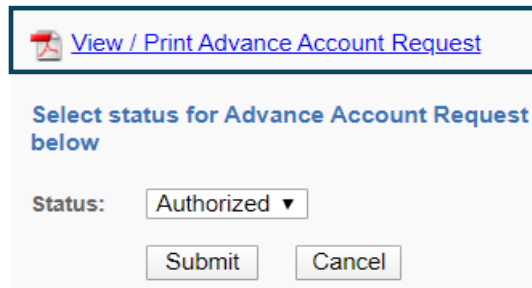
[Awards In My Unit](#)


**Pre-Award Spending Approver Inbox**

To Be Authorized Previously Reviewed

Date Submitted	Project Title	Account	Unit Authorized	Dean/Chancellor Auth	
02/11/2020	<a href="#">12/11/2018 Apple NSF</a>		---	---	<a href="#">Manage</a>

7. Select **View/Print Advance Account Request** to review the Description of Assurances of Funding in the PDF to ensure necessary information was provided.

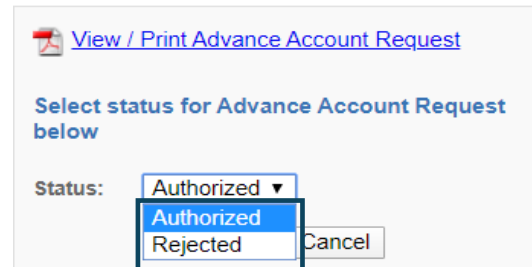



 [View / Print Advance Account Request](#)

Select status for Advance Account Request below

Status:

8. If you endorse the request, select **Authorized**. If you do not endorse the request, select **Rejected**.
  - a. **Endorsing** the Advance Account Request **confirms the administering unit will fund any costs incurred associated with this request in the event the Sponsor does not fund the project.**



 [View / Print Advance Account Request](#)

Select status for Advance Account Request below

Status:

9. Click **Submit** to complete the process.