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.

1. From the **Proposal Dashboard**, select **Advance Account Inbox**.
2. On the **Pre-Award Spending Approver Inbox** screen, click on the **Project Title** to download and view a PDF of the IPF.

3. 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**.

4. 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:
   a. Either click the **Attachments** tab (indicated with a paperclip icon)
   b. Or click the **Proposal** Number in the top left, then click on **Proposal Attachments** in the left column.

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.

6. To endorse or reject the request, return to the request in the **Advance Account Request Inbox** and select **Manage**.
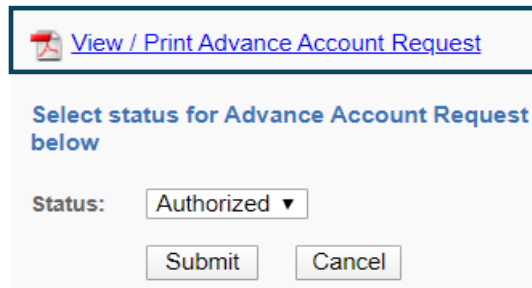
7. Select **View/Print Advance Account Request** to review the Description of Assurances of Funding in the PDF to ensure necessary information was provided.
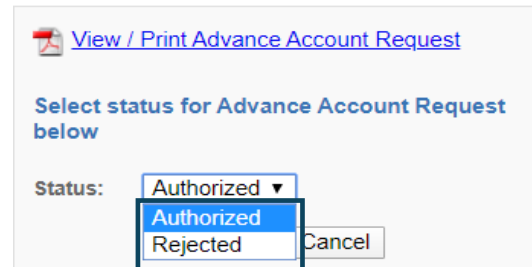
8. If you endorse the request, select **Authorized.** If you do not endorse the request, select **Rejected.**
   a. **Endorsing** the Advance Account Request **confirms the administering unit will fund any costs incurred associated with this request in the event the Sponsor does not fund the project.**

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