Early and Extended Account requests are initiated by the SeRA transaction type of “Account Setup - Early/Extend”. If an agreement has not been received, a new early account would be created. If a project has been funded by an agreement, the Office of Sponsored Research may extend the end date of existing account (Oracle Award), or open a new account (Oracle Award and/or Task) based on the agreement terms and conditions, or how a submitted supplement or renewal proposal may be subsequently awarded and funded by the sponsor.

**Early Account Setup Request**

1. From the SeRA Home Page, use the Search function at the page header to enter the SPO number of the project which needs an Early or Extended Account request. Press the “Enter” key on your keyboard to start the search.

2. A pop-up window displaying the project SPO number and other project reference information will appear. Click on the blue SPO number link to access the project record. You will be directed to the Project Summary page.

3. At the bottom of the Project Summary page is the Start a Transaction region with a pull-down menu with a prompt to -- Select Transaction --. Click on the arrows and select “Account Setup - Early /Extend” from the menu then click on the Start a Transaction button. You will be directed to the Transaction Home (Early/Extend Account Request) page.

Once the Early/Extend Account Request transaction is started, you will be directed to the newly created Transaction Home (Early/Extend Account Request) page.
Left Hand Navigation

The left hand navigation (LHN) displays:

- SeRA Home page - My Dashboard (for administrators) / My Projects (for faculty)
- SPO number
- PTA(#######) Transaction ID number
- Transaction Home page
- Approvers page
- Review & Submit page
- SeRA User Guides link
- Help Request (HelpSU ticket submission)

Right Hand Menu

Transaction ID: Unique identifier in PTA(#######) format
Assigned to: Name of current transaction assignee
Status: The current state of the transaction

Actions provide options to:

- **Save** the transaction and return to the SeRA home page without routing the request
- **Reassign** the transaction to another person
- **Review for Completeness** - review fields to determine if all required fields were completed
- **Terminate Transaction** - terminate the request

Quick Links provide links to:

- **View Attachments** related to the project.
- **View PDRF** - the Proposal Development Routing Form routed for the project proposal
- **View PTA Details** of the early/extended account/PTA
- **IDC Rates** on the Stanford DoResearch rates webpage
4. On the Transaction Home (Early/Extend Account Request) page, the PTA Configuration region displays the recommended account PTA information.

5. Buttons to Edit the Oracle Award (A), Project (B), and Task (C), are aligned on the left and an + Add Task (D) link is at the right/end of the Project row.

6. Click on the respective edit buttons to complete the required Award, Project and Task fields. Clicking on the Edit Award button or the red Next (Oracle Award) button will redirect you to the Edit Award (Early/Extend Account Request) page.
7. On the Edit Award (Early/Extend Account Request) page, some fields are prepopulated from the proposal PDRF record and editable, while others are blank. Complete or edit the fields. Fields with a red asterisk * are required to submit the request.
8. At the bottom of the Edit Award (Early/Extend Account Request) page, is the Projects, Tasks and Budgets region. Click on the Edit Project button. The PROJECT - NONCAP window will pop-up.

9. Complete or edit the fields in the PROJECT - NONCAP pop-up window. Some fields are prepopulated from the proposal PDRF record and editable, while others are blank. Fields with a red asterisk * are required to submit the request. Click on the Save button once all required fields have been completed. The pop-window will close and you will be directed back to the Edit Award (Early/Extend Account Request) page.
10. At the bottom of the Edit Award (Early/Extend Account Request) page, is the Projects, Tasks and Budgets region. Click on the Edit Task button. The Edit Task window will pop-up.

11. Complete or edit the fields in the Edit Task pop-up window. Some fields are prepopulated from the proposal PDRF record and editable, while others are blank. Fields with a red asterisk * are required to submit the request. Click on the Save button once all required fields have been completed. The pop-window will close and you will be directed back to the Edit Award (Early/Extend Account Request) page.
12. At the very bottom of the Edit Award (Early/Extend Account Request) page, are the Actions menu and red Next button. Click on the Next button. You will be directed to the Approvers (Early/Extend Account Request) page.

13. On the Approvers (Early/Extended Account Request) page the Additional FYIs region provides the option to add and designate recipients to receive FYI email notification of the Early/Extended Account request. Click on the Add FYI Recipient button and the Add FYI window will pop-up.

14. Enter the FYI recipient’s name in the Add FYI window. His/her email and phone number will auto-populate. Click the Add button.
15. On the Approvers (Early/Extended Account Request) page the Approvals region allows for adding approvers for the Early/Extended Account request. The PI is automatically designated as the first approver. To add other required approvers click on the Add Approver button and the Add Approver window will pop-up.

Note: for School of Medicine department requests, the advisory of “SCHOOL OF MEDICINE REQUESTS: - Please add an Authorized Department/Division representative (i.e. DFA, Division Mgr, or Financial Mgr) to this request” is displayed to remind the addition of the appropriate required SoM approvers.

16. Enter the Approver’s name in the Add Approver window. His/her email and phone number will auto-populate. Select the appropriate approver Role from the pull-down menu. Click the Add button.
17. At the very bottom of the Approvers (Early/Extend Account Request) page, are the Actions menu and red Next button. Click on the Next button. You will be directed to the Review & Submit page.

18. On the Review & Submit page any missing required information will be displayed. Blue clickable links to the Edit Award, Project and Task page or pop-up windows will display along with a list of the fields which require completion. Click on the link to complete the missing fields. If the required fields were completed the “You have completed details necessary for the request” confirmation will be displayed (proceed to 19).
19. If you completed the required fields, you will be directed to the Review & Submit page with a confirmation stating “You have completed details necessary for the request”.

20. The Comments region provides a Comments text box to accommodate up to 2,000 characters/spaces of text.

21. Click on the Submit for Approval button to submit the request for approvers, starting with the PI. The PI and each subsequent approver will receive an email notification of their approval task with an embedded link to the approval task in the email. The approval tasks will be listed in their individual SeRA My Actions queues. You will be directed to your My Dashboard - My Action Items tab also known as the SeRA Home page.

22. From the My Dashboard, click on the Pipeline tab to confirm the Early/Extended Account request has been routed to the PI for his/her approval.
23. The Early/Extended Account Request will now be listed in My Pipeline with a clickable Transaction ID# PTA######## link.

24. The transaction will be routed first to the PI for his/her approval which will be displayed in his/her My Action Items.

25. Once PI department, school, dean approvals are complete, the transaction will be routed to the appropriate central office - Office of Sponsored Research, Research Management Group, Industrial Contracts Office - for any required institutional approval, then routed to OSR Post-Award for account setup. A notification will be sent to confirm the early/extended account has been setup.