Extend Account Setup Request

Extend [and Early] Account requests are used to request OSR to extend the end date of an existing account (Oracle Award) by the SeRA transaction type of **Account Setup - Early/Extend**

- Spending on Early and Extended accounts is considered at-risk spending and must be guaranteed by the Principal Investigator that authorizes the early/extend PTA account with a non-sponsored PTA with sufficient funds to be able to cover the expenses charged to the extended account in the event funding is not awarded or received from the sponsor, or if expenditures posted to the early/extend PTA account are deemed unallowable.

- **Accounts will be extended for no more than 90 days at a time.** If an account needs to be extended beyond 90 days from the current sponsor approved end date, the administering department will need to submit a new Early/Extend transaction at the end of each 90 day extension period.

1. From within SeRA search for the SPO # for which you want to create an **Early/Extend** transaction

   ![Search](image)

2. From the Project Summary page, click on **Start a Transaction** menu, and select **Account Setup – Early/Extend**

   ![Project Summary](image)

3. Click **Start**

   ![Start Transaction](image)
4. Click **Edit Request Details** on the far right hand side of the screen.

5. Within the Edit Request dialogue box complete...
   
   A. **Guarantee Amount** – estimated expenses during extended account period
   
   B. **Guarantee Award** – Non-sponsored Oracle Award being used to guarantee expenses
   
   C. **Guarantee Project** - Oracle Project being used to guarantee expenses
   
   D. **Guarantee Task** - Oracle Task being used to guarantee expenses

   E. The active awards currently associated with this SPO are shown here. **Select and check the box** of the award for which you would like to continue spending or which closely resembles the required new award or task. You will be able to enter any comments the Post Award accountant on the approvals screen.

   F. Click **Save**

6. Review and verify the **Request Details**, edit if necessary, and click **Next**
7. If there are any protocols attached to this project, they will be displayed in the **Compliance** section

![Compliance](image)

8. Click on the **Add FYI Recipient** button to add any individuals you would like to be notified once the Early/Extend request has been completed

![Add FYI Recipient](image)

9. Click on the **Add Approver** button to add an approver

![Add Approver](image)

- For School of Medicine requests, the following approvers are required:
  - At least **ONE** Authorized Department/Division representative (i.e. DFA, Division Mgr, or Financial Mgr)
  - School of Medicine Fiscal Affairs Office. **Auto-populates for School of Medicine only**
  - School of Medicine Research Management Group Institutional Official. [Find your RMG Institutional Official](#)
  - Office of Sponsored Research Institutional Official (if necessary). [Find your OSR Institutional Official](#)
- All other schools/units, please follow local guidelines for approvers

10. Select the appropriate **Approver** and **Role Type** from the drop down menus, click **Add**, then click **Next**

- If the available selections are not names you recognize, please contact your Authorized Department/Division representative to verify who to select

![Add Approver](image)
11. The transaction will validate. If any required information is missing it will be listed with a blue link that will navigate you directly to the field that needs completion. Once all requirements have been met you will be able to click **Next**.

12. Enter in any comments or special instructions needed to setup the PTA to Post-Award, then click **Submit for Approval**.

If you have questions, please [submit a Help ticket](#).