Early and Extended Account requests are initiated by the same SeRA transaction type of “Account Setup - Early/Extend”. If an agreement has not been received, an 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 the 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.

**Extended Account**

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 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
- Segment 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 NOA** - view the last Stanford Notice of Award
- **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 Request Details region click on the Edit Request Details button. The Edit Request window will pop-up.

5. Complete the fields in the Edit Request window. Enter the non-sponsored guarantee Oracle Award which populates the project pull-down menu with related Oracle Projects. Selection of the Oracle Project populates related Oracle Tasks pull-down menu. Select the appropriate Oracle Task.

6. Active Oracle Awards under the project SPO number are displayed. Check the box of each Oracle Award which you want to be extended. Click the Save button.

<table>
<thead>
<tr>
<th>Guarantee Amount</th>
<th>Estimated expenses during 3-month extended account period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guarantee Award</td>
<td>Non-sponsored Oracle Award used to guarantee expenses</td>
</tr>
<tr>
<td>Project</td>
<td>Oracle Project to be used to guarantee the early expenses</td>
</tr>
<tr>
<td>Task</td>
<td>Oracle Task to be used to guarantee the early expenses</td>
</tr>
</tbody>
</table>

**Instructions:**
The active awards currently associated with this SPO are shown below.

Select the award for which you would either like to continue spending or which most closely resembles the required new award or task.

- [ ] WAHDV 08/01/2012 to 07/31/2016
- [ ] PAOX09/01/2012 to 07/31/2016

[Cancel]  [Save]
7. 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.

8. 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 extended account request. Click on the Add FYI Recipient button and the Add FYI window will pop-up.

9. Enter the FYI recipient’s name in the Add FYI window. His/her email and phone number will auto-populate. Click the Add button.
10. 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.

![Approvals Table]

11. Enter the Approvers 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.
12. 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.

13. On the Review & Submit page any missing required information will be displayed. Blue clickable links to edit the Request Details page 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 14).
14. 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”.

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

16. 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.

17. 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.
18. The Early/Extended Account Request will now be listed in My Pipeline with a clickable Transaction ID# PTA#### link.

![My Pipeline screenshot]

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

![My Projects screenshot]

20. 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.