

University of Wisconsin Grants Project Desk Reference

Madison * Milwaukee * Extension

WISPER – Request an Advance Account

WISPER facilitates the request for Projects to be Set up in Advance of the Award being received and fully executed. **After all of the project details have been collected, the PI has signed the Award Signature and the Division has signed the Award Signature, the items are in place for this request to occur.** This Desk Reference walks through the process for making the request via an approval request to the division using the “Request advance award setup” approval type and the Division Action page informing RSP. Refer to the “Project Details” desk reference in order to confirm you have met the requirements detailed above.

DEPARTMENT OR PI ADVANCE AWARD ACTIONS

I. Login & Select the WISPER record:

1. Navigate to the WISPER login page via <http://www.rsp.wisc.edu/WISPER/>, select the Log in to WISPER button, then enter your netID and password. You will be directed to your my WISPER page.
2. Locate the record for which you want to request the Advance Account using your my WORKLIST page or by the Search page.

II. Complete the Project & Protocol Details requirements

1. Instructions for this step are separately located on the WISPER page <http://www.rsp.wisc.edu/WISPER/>

III. Request Approval for an Advance Account:

1. Select the Approvals tab
2. Click the Add Approval button
3. Using the drop down box for approval type, select “Request Advance Award”.
4. Enter additional justification in the Approval Text box.
5. Select the Administering Division from the Division Drop down.
6. Click the Add Approval button.
7. Note that additional justification for the request may be needed. Your division may have additional requirements that need to be met prior to submitting this request.

Add Approval

Requested By	BALSER,TERESA C	Request Date	01/12/08 5:05PM	Sequence	2
Approval Type	<input type="text"/>				
Approval Request	<input type="text"/>				
Approver Type	<input type="text"/>			Business Unit	UWMSN
Requested Approver	<input type="text"/>			<input type="button" value="Add Approval"/>	<input type="button" value="Cancel"/>

Other Dept or Div Resource
PI Approve Terms
PI Signature
Request Advance Award Setup
Revised Budget
Revised Budget to RSP
WARF Review

DIVISION ADVANCE AWARD ACTIONS

I. Login & Select the WISPER record:

1. Navigate to the WISPER login page via <http://www.rsp.wisc.edu/WISPER/>, select the Log in to WISPER button, then enter your netID and password. You will be directed to your my WISPER page.
2. In the “Select Worklist” drop down, choose “to my division role”. The record pending the Advance Award will appear in the Approvals section of the worklist. Select the record.

II. Review Approval for an Advance Account:

1. Select the Approvals tab and locate the requested approval for the “Request Advance Award Setup.”
2. Click the details hyperlink to take you to the approval detail page.
3. Read the approval details, make comments if necessary, and click the “Approve” button.

<input type="checkbox"/> Override Electronic Signatures	
<input type="button" value="Validate to Submit"/>	<input type="button" value="Submit to SPO"/>
<input type="button" value="Validate to Req Adv Account"/>	<input type="button" value="Request Advance Account of SPO"/>
<input type="button" value="Validate to Req Project /Award Finalized of SPO"/>	<input type="button" value="Request Project /Award Finalized of SPO"/>

III. Request an Advance Account to RSP.

1. Select the Division Action tab.
2. Ensure that the division award signature has been executed.
3. Scroll to the bottom of the page to locate the “Validate to Req Adv Account” button. Clicking this button will run validations to ensure that all necessary information is included on the record before making the request of RSP.
4. Correct any identified errors and repeat the validation process until the record passes the Advance Account validation.

When the record is ready to be submitted to RSP and the record has been reviewed to the division’s satisfaction, click the “Request Advance Account of SPO” button. A page will open to verify this request. Click “Process Record” to proceed. The record has been submitted to the current RSP owner for processing. Award and Project information will be reported to you via email