

**University of Wisconsin
Grants Project
Desk Reference**
Extension

WISPER – Request Project ID in Advance of Award

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 tab details have been collected, the PI has signed the Award Signature, the Division has signed the Award Signature, and a hard copy of the WISPER record and all relevant forms and documents have been provided to SPO, 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 SPO. Refer to the “WISPER Record Creation” desk reference 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 authentication hub at <https://portal.sfs.wisconsin.edu/login>, select your institution, and then enter your NetID and password.
2. Click on UW WISPER and locate the record for which you want to request the advance Project IDs using your MY WISPER worklist or by the Search page.

II. Complete the Project & Protocol Details requirements under the Projects tab:

Instructions for this step are included in the “WISPER Record Creation” desk reference beginning on page 6 of that document. All steps in that desk reference should be followed completely prior to requesting a project number in advance. If a WISPER record has not been created previously and on file with SPO, create such record now.

III. Request Approval of the Division

1. Select the Approvals tab
2. Click the Initiate New Approval Request button
3. Using the drop down box for approval type, select “Request Advance Award” (see figure below).
4. Enter additional justification or information to assist the Division in its review in the Approval Request text box. Note that each Division may require additional justification, attachments or information in order to process this request. Please contact your Division if you are unsure of your Division’s requirements.
5. The Approver Type is automatically selected to be “Division”.
6. Select the Administering Division from the Division drop down box.
7. Click the Add Approval button.

Add Approval

Requested By SZETO, JESSE J Request Date 02/14/12 3:44PM Sequence 1

Approval Type Request Advance Award Setup

Approval Request Department Approval
Division Approve Terms
Human Subjects Approval
Other
PI Approve Terms
Request Advance Award Setup
Revised Budget

Approver Type Division

Requested Approver

Business Unit UWEXT

Add Approval Cancel

DIVISION ADVANCE AWARD ACTIONS

I. Login & Select the WISPER record:

1. Navigate to the authentication hub at <https://portal.sfs.wisconsin.edu/login>, select your institution, and then enter your NetID and password.
2. Navigate to your MY WISPER work list.
3. The default view is of "My Worklist". Select the "Division Worklist" tab. The record pending the Advance Award will appear in the "Approvals I Need to Complete" 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 Review/Approve hyperlink to take you to the approval detail page.
3. Read the approval details, make comments if necessary, and click the "Approve" button. If you need additional information, you may *Submit Comment Only* or *Deny* at this time to return the record to the requester and seek additional information.

III. Request Advance set up of SPO:

1. Ensure that a hard copy of the WISPER record and applicable documentation is already on file with SPO. If not, send or deliver a hard copy to SPO.
2. Select the Division Action tab.
3. Ensure that the division award signature has been executed.
4. Scroll to the bottom of the page to locate the *Validate to Req Adv Account* button (see figure below). Clicking this button will run validations to ensure that all necessary information is included on the record before making the request of SPO.
5. Correct any identified errors and repeat the validation process until the record passes the Advance Account validation. Because UW-Extension does not currently use the following functions in WISPER, ignore these warnings:
 - a. Outside Activities Report
 - b. Effort requirements
 - c. Commitments
6. Select the *Request Advance Account of SPO* button (see figure below). A page will open to verify this request. Click "Process Record" to proceed. The record has been submitted to the current SPO owner for processing. Award and Project information will be reported to you via email.
7. If SPO requires additional information or denies request, you will receive an e-mail notification, and the WISPER record will be routed back to the Division.

The screenshot shows a grid of buttons in a WISPER interface. At the top left, there is a checkbox labeled "Override Electronic Signatures". Below it are two columns of buttons. The left column contains three buttons: "Validate to Submit", "Validate to Req Adv Account", and "Validate to Req Project /Award Finalized of SPO". The right column contains three buttons: "Submit to SPO", "Request Advance Account of SPO", and "Request Project /Award Finalized of SPO". The buttons "Validate to Req Adv Account" and "Request Advance Account of SPO" are circled in red.