

Effort Documentation Required When an Account Number is Delayed

Requesting an Advance Account:

Instructions for how to request an advance account within PERIS™ [MyFunding](#) can be found on the PERIS™ project website in the Quick Guides Section:

<https://electronicresearch.pitt.edu/training/quick-guides/>

Contracts will not be issued early accounts. If your award is not a contract, evidence must be furnished with your 90-day exception request that you had requested an Advance Account, but it was denied.

For each anticipated account and subaccount denied an Advance Account:

1. Email the PI associated to that work and detail your understanding of the following:
 - a. Name/employee number of each individual working on the project (including the PI)
 - b. Level of effort contributed by each
 - c. Start date of that effort for each
 - d. Any variations in effort for those folks during the time period involved before an account is created
 - e. The institution account that will be used to record this effort until a project account is provided
2. PI must respond confirming the details of effort for everyone or indicating any additions, deletions or changes to the info presented.
3. After the initial PI confirmation of effort, and until account numbers are activated, resend the PI's confirmation and inquire if there are any additions, deletions or changes since the last confirmation including dates of these changes. This follow up should be sent periodically as circumstances change but no less than once each Period of Performance.
4. PI must respond confirming or updating effort allocations.
5. Retain all communications documenting effort allocations of these research personnel as support for the 90-day exception request.

6. Include with the 90-day exception request documentation identifying the award as a contract, the contract begin and end dates, and the allowability of pre-award costs, if applicable.

It is critical that the information in steps 1 and 2 be completed as work begins on the project, and not at a later date to satisfy a 90-day request. This documentation will prove under audit that the late transfer of effort was due to administrative delays in activating an account but that the effort eventually reflected on the project account was the plan from the beginning.