



Marshall University Research Corporation

How to Complete the Advanced Funding Request Form

What This Form Is For

Use this form to request temporary internal funding when:

- Your project has been awarded or is expected to be awarded, but
- The official award notice or funds have not yet been received

Step 1: Requester Information

- If you (the PI) are completing the form:
 - Enter your name, email, phone, and department
- If an administrator is completing on your behalf:
 - They will enter their info, but the form will route to you for approval

✓ Select:

- "No, I am the PI" (if completing yourself)
- "Yes" (if submitting on behalf of a PI)

Step 2: Project Information

Complete all required fields:

- **Project Title** – Must match proposal/award
- **Sponsoring Agency** – Name of sponsor (e.g., NIH, NSF, etc.)
- **Cayuse SP Record #** – Your proposal record number
- **Funding Source** – Select appropriate option
 - **Type of Request** – Select and attach agency approval documentation Example: Award notice, email confirmation, sponsor documentation

Step 3: Budget Period

- Enter the official project period from the sponsor
- Then enter the requested advanced funding period
 - ⚠ Cannot exceed 90 days

Step 4: Award Amount

- Enter the total anticipated award amount

Step 5: Compliance Questions

Answer all required questions:

- **Conflict of Interest (COI)** – Select Yes/No
- **SFID (Significant Financial Interest Disclosure)**
 - ⚠ Must be completed before approval
- **Protocol Compliance Table**
 - Check all that apply:
 - Human Subjects
 - Animals
 - Hazardous Materials, etc.
- If applicable:
 - Enter approval status
 - Provide protocol number and approval date



Step 6: Project Funding Questions

Indicate:

- Is the project **NSF funded?**
- Is the project **PHS funded?**

(These impact compliance requirements)

Step 7: Attach Required Documentation

Upload:

- Evidence of pending funding, such as:
 - Award notice
 - Sponsor email
 - Supporting documentation

Step 8: Default Fund & Guarantee Section

This is critical

- The **default fund/org** is the backup funding source
- Select the **Default PI** (who is responsible if funding does not come through)
- ✓ Check the **GUARANTEE box**:
 - Confirms the department will:
 - Cover all expenses if funding is not received
 - Transfer costs to the default fund if needed

Step 9: Budget Breakdown (Certification Section)

Enter how the advanced funds will be used:

- Salaries
- Benefits
- Travel
- Equipment
- Supplies
- Contractual
- Indirect (F&A)
- Other (if needed)

⚠ Key Rule:

- The total requested should typically not exceed 25% of the total award (¼ of award)

✓ Attach:

- Detailed budget + budget justification

Step 10: Indirect Costs

- Indicate whether the **agency limits F&A**
- Use the correct **approved rate** unless restricted



Step II: Signatures & Routing

The form will route for approval:

1. PI (if submitted by admin)
2. Chair / Dean / VP
3. MURC Review

✓ You must:

- Search and select your Chair/Dean/VP
- Add comments if needed
- Click to sign

Important Reminders

- Advanced funding is temporary (max 90 days)
- Documentation is required for approval
- Your department assumes financial risk
- SFID and compliance approvals must be complete
- Spending should align with approved budget categories

Quick Tip for PIs

Only request advanced funding when:

- You are confident funding is coming, and
- You need to begin spending immediately (e.g., hiring, time-sensitive work)