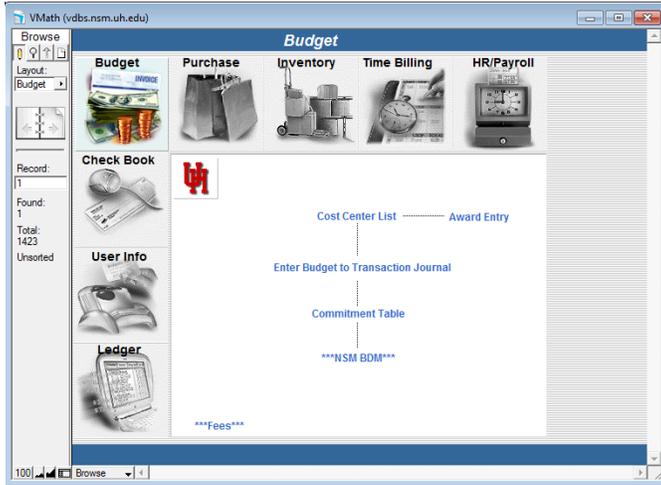


Sponsored Project Pre-Closing Reviews

At the beginning of the month, search for grants that will be closing in the next 6 months.

In FMP

1. Go to Budgets → Award Entry



2. Press "Find"
3. In the 'End Date' type the first day of the previous month "... " last day of the month six months from now, i.e., if you are in May 2013, type 4/1/13...11/30/13
4. In the "Sub Acct' field enter =
5. In the 'Status' field choose active
6. In the Layout toggle, choose "Reconciliation"
7. Press the Expiration Date heading. This will put the records in chronological order by the project end date

Award Entry View Archived MAIN MENU

Account Status Summary List View Usage List

Account Title: Sponsor:

Begin Date: Matching Fund: IDC Rate: (enter as decimal eg 0.12 for 12%)
 End Date: Cost Sharing: Cost Share Types: FDP: Reconciled Date: Rec. By:

Project End Date: Project Years: Grant Type: A-21: Effort Reporting Level

PI Name: PI Short: User Id.: E-mail: E-Mail PI

Manager: Empl. ID.:

FRS Acct	Sub Acct	Bus. Unit	Fund	Dept	Program	Project	Speed Type	Sub Ledger	Fiscal Yr	Status

8. You will need to prepare 6 months, 60 day, 30 day, and end date reviews for the respective sponsored projects
9. Forms can be found in the Math Business Manual

10. Complete the information at the top of the page. Accounting end date is found in RD2K

Six Month Pre-Closing Review

PI Name: _____ Speed: _____

PS cost center: _____

Sponsor: _____ Expiration Date: _____

This is year ____ of a ____-year project. Accounting End Date: _____

A-21: Yes / No FDP: Yes / No Fixed price / Cost-reimbursible

11. Follow the items on the checklist and mark them off as completed
12. Prepare an email to the PI as indicated on the review. Email the PI and await response. If no response, assume the project will end in six months
13. Sign the bottom of the form and route to DBA for approval