Close a Project - Process Help

Use these instructions to close a project. Refer to the procedure and guidance documents for criteria to close a project.

Prerequisites

- You must have one of the following responsibilities to close a project:
  - ORG OGM Billing Specialist
  - ORG Account Establishment Specialist
  - ORG Account Establishment Specialist with Budget Approvals
  - ORG Account Establishment Administrator
- The corresponding award is being closed and the project is not continuing.
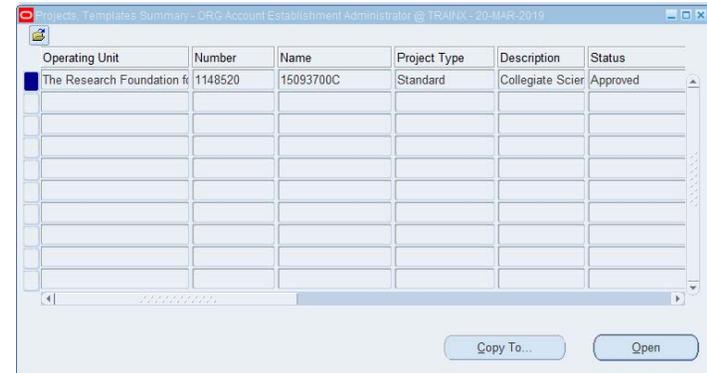- The project has termed.

To close a project:

1. Navigate to **Projects** to open the **Find Projects** form.
2. Enter the **Project** number.
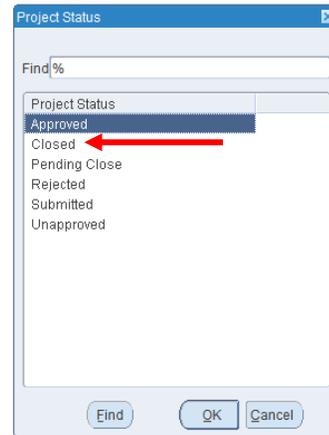3. Click **Find** to open the Project, Templates Summary form.

4. Click **Open** to open the Project Templates form.

5. Click the **Change Status** button.
6. Chose **Closed** from the list of values.
7. Click **OK**.

8. Click **File > Save** to save your changes.
9. Click **File > Close Form**.