



## Close an Award - Process Help

Use these instructions to close an award. Refer to the procedure and guidance documents for criteria to close an award.

### **Prerequisites**

- You must have one of the following responsibilities to close an award:
  - ORG OGM Billing Specialist
  - ORG Account Establishment Specialist
  - ORG Account Establishment Specialist with Budget Approvals
  - ORG Account Establishment Administrator
- The award number does not have any carry forward.
- The award number does not have any open encumbrances, purchase orders, or receivables against it.
- All reports and deliverables have been submitted to the sponsor, if required, and the reports tab in the Award Management screen has been updated.
- Award has termed.
- All closing edit requirements have been met.

**To close an award:**

1. Navigate to **Awards** to open the **Find Award** form.
2. Enter the number for the award that needs to be closed.
3. Click **Find** to open the **Award Management Folder** form.

Find Award - ORG Account Establishment Administrator @ TRAINX - 06-MAR-2019

Award

Search For: Templates, Awards

Number: 000001

Short Name: [ ]

Type: [ ]

Status: [ ]

Organization: [ ]

Key Member

Name: [ ]

Number: [ ]

Role: [ ]

Funding Source

Number: [ ]

Name: [ ]

Clear Find

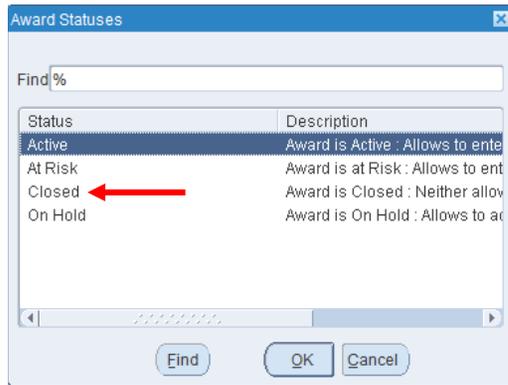
4. Click **Open** to open the **Award Management** form.

Award Management Folder - ORG Account Establishment Administrator @ TRAINX - 06-MAR-2019

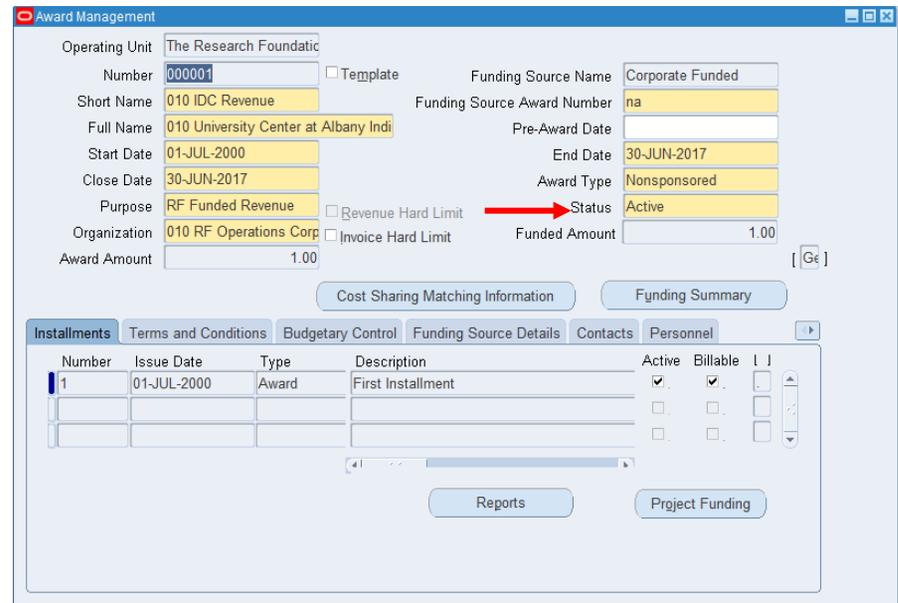
Operating Unit	Number	Short Name	Type	Status	Funding Source Name	Start Date	Template
The Research F	000001	010 IDC Revenu	Nonsponsored	Active	Corporate Funde	01-JUL-2000	<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>

Copy To Open

5. In the **Status** field, select **Closed** from the drop-down menu.



6. Choose **File > Save** or click on the **Save** icon.



The **Status** field displays closed and the **Flexfield** indicates the Closure Date.

**Award Management**

Operating Unit: The Research Foundatic  
 Number: 000001  Template  
 Short Name: 010 IDC Revenue  
 Full Name: 010 University Center at Albany Indi  
 Start Date: 01-JUL-2000  
 Close Date: 30-JUN-2017  
 Purpose: RF Funded Revenue  
 Organization: 010 RF Operations C...  
 Award Amount: 1.00

Funding Source Name: Corporate Funded  
 Funding Source Award Number: na  
 Pre-Award Date:  
 End Date: 30-JUN-2017  
 Award Type: Nonsponsored  
 Status: Closed  
 Funded Amount: 1.00

Revenue Hard Limit  
 Invoice Hard Limit

Buttons: Cost Sharing Matching Information, Funding Summary

Number	Issue Date	Type	Description	Active	Billable	I
1	01-JUL-2000	Award	First Installment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Buttons: Reports, Project Funding

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

**Awards Descriptive Flexfield**

NACUBO: General Administration  
 On/Off Campus: On On  
 Property Title: No Property Purchased  
 Closure Date: 06-MAR-2019 09:33:53  
 IDC Calc Period: N No IDC  
 Invoice Certification:  
 Override Rate: 0.00  
 IDC Rate Type:  
 Funding Type:  
 Disencumber IDC:  
 Interest Income: No Requirement to Report or Pay Interest

Buttons: OK, Cancel, Clear, Help