



EMORY
UNIVERSITY

Research
Administration

Introduction to Award Closeout Using the Project and Award Closeout Tool (PACT)

Facilitator:

Martha Lopez, Training Manager

Finance: Grants & Contracts (FGC)

Research Administration Services (RAS)

Welcome

- **Introductions**

- Name
- Role
- Department
- Length of service with Emory
- Time in Research Administration

- **Logistics**

- Restrooms
 - Breaks
 - Mobile Phones
-



PACT Learning Objectives

As a result of participating in this course, you will be able to:



- **Describe** the overall Closeout process for Emory University.
- **Define** the role of both Research Administration Services (RAS) and Finance: Grants and Contracts (FGC) in the Closeout process.
- **Identify** the timelines associated with Closeout.

Agenda

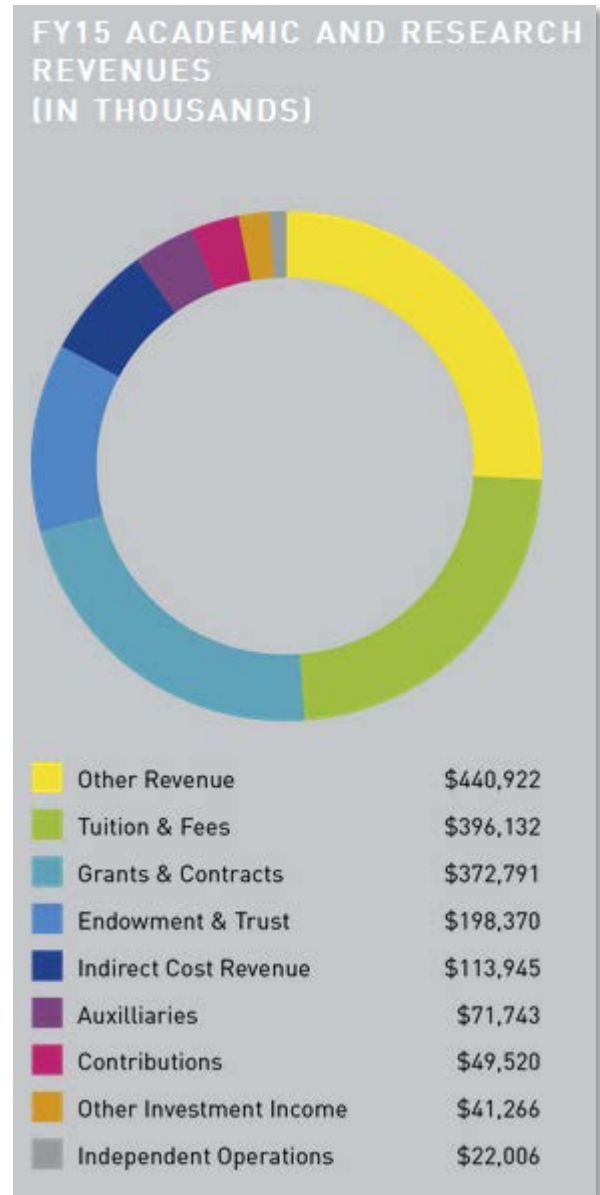
- **Overview**
 - Final Review
 - Closeout Preparation
 - PMS Transition
 - OMB Circulars
 - Project and Award Closeout Tool (PACT)
- **Roles and Responsibilities**
 - RAS and FGC
 - Process Map
 - High-level Review of the Process
- **Common Closeout Timelines**
- **Using the Tool**
 - Hands-On Demonstration
 - Participant Practice



Sponsored Research at Emory University FY15

Emory University's total sponsored revenue (\$372.8m) including indirect cost recoveries (\$113.9m), as well as government and other grants and contracts has increased to \$486.7 million over the prior year.

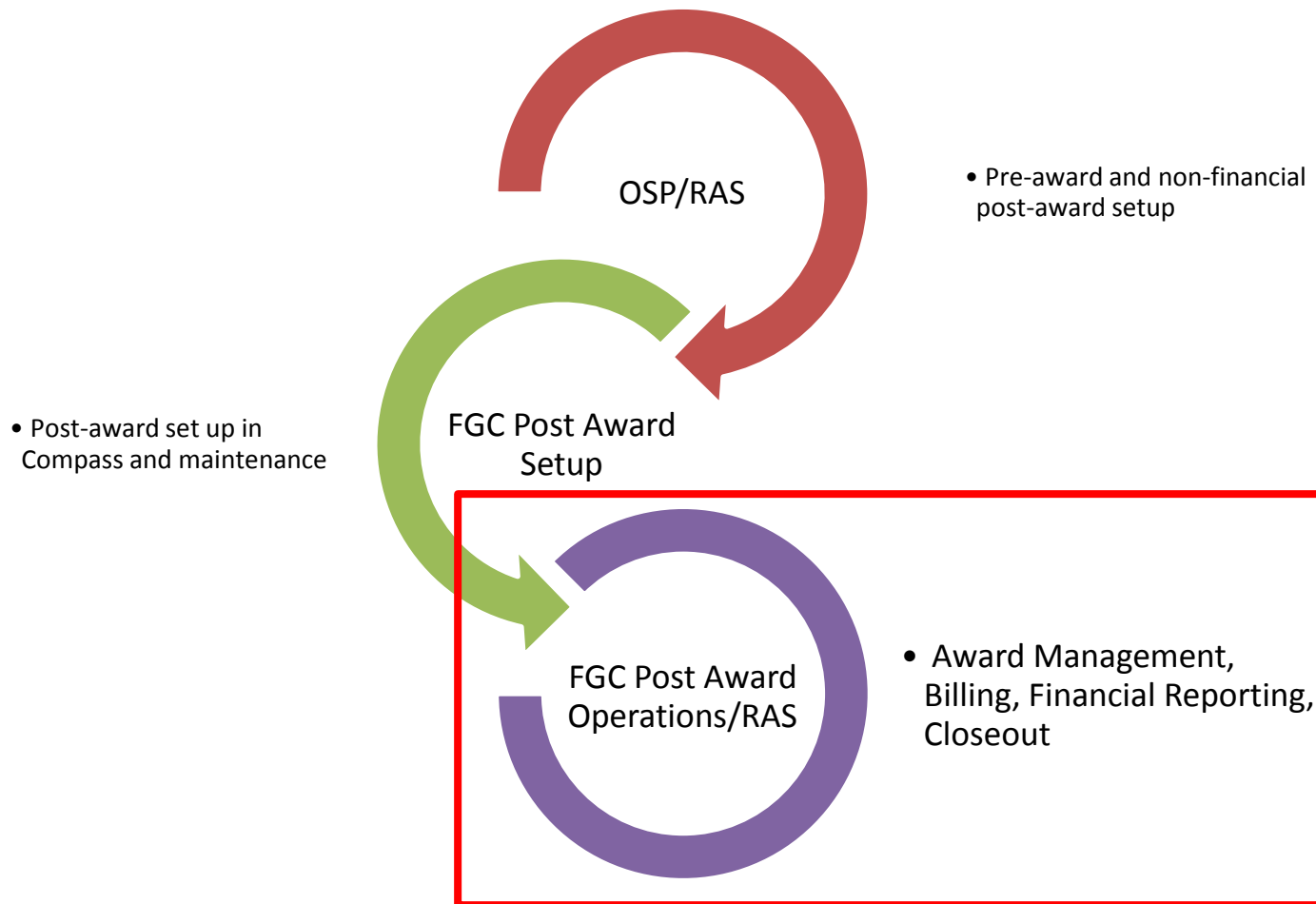
During FY15 Emory received **2,923 sponsored awards** totaling **\$572.4 million**.



Where does that fit into the award lifecycle?



Financial Management of Awards at Emory





AWARD CLOSEOUT

Definition/Description

Closeout is closing of a sponsored award that has ended and will no longer be continued or funded.

- It is prepared in collaboration with the RAS/department and completed in Compass by the Office of Finance: Grants & Contracts (FGC) on behalf of the Principal Investigator (PI).

This includes awards:

- That are relinquished/transferred
- With a new competitive segment
- Under All Compass Contract types



Closeout Checkpoints

FGC

Final Financial Reports/
Final Invoices Submitted to Sponsor

RAS

All Other Award-Related
Reports have been Submitted
(i.e. Final Invention Statements, Final Progress
Reports, etc.)

**Now that the
award has ended
– what's next?**

FGC

All Funds Received and Applied
Budget Equals Expenses
A/R is Zero

FGC

All Associated Speedtypes Inactivated
All Projects Closed and Archived
Contract and Award Closed

Introduction to Award Closeout

WHY DOES CLOSEOUT NEED TO HAPPEN?

- Helps to minimize financial risk to Emory
- Ensure compliance with sponsor guidelines
- Ability to collect funds and receive future funding



COMMON ISSUES

- Large number of awards ended but not closed out
 - may have deficits or surpluses (cash or budget)
 - incorrect final reporting
 - incorrect charges sitting on the award
- Proactively managing the award throughout the lifecycle will ensure a more efficient and timelier closeout process.
- Timely close out
 - keep the award clean
 - minimize any financial risk to Emory

Introduction to Award Closeout

WHEN DOES CLOSEOUT OCCUR?

AFTER the award has ended:

- PACT (Project & Award Closeout Tool) has been sent to FGC by RAS
 - Generally due 30 days after the final financial report/final invoice is submitted to the agency

Closeout is a Collaborative effort:

- Verify CLOSE milestone due dates are set up correctly
- Award is reconciled and all outstanding items cleared
- PACT is received on time
- All sponsor deliverables have been met
- All final reporting/invoicing has been submitted to the sponsor
- All cash has been collected for the award



Tip! *If an award is clean and ready to close, the closeout can be started earlier than the milestone due dates.*

Common Questions

The ART has been completed & submitted to FGC, the Final FSR/Final Invoice has been submitted to the sponsor, but you still have questions:

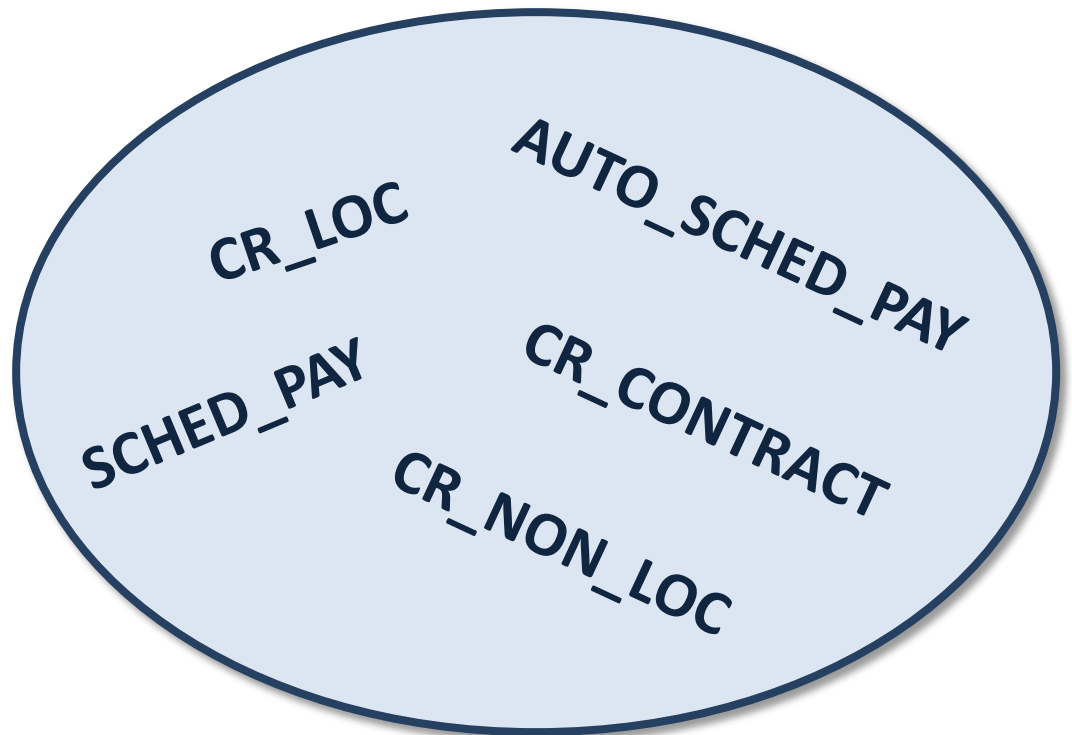
- *When are Final F&A adjustments made?*
- *When are budgets adjusted?*
- *Do the expenses and budgets have to match for project closeout?*
- *Can the Speedtype be inactivated before the residual balances are transferred?*
- *Is the A/R zero if the sponsor is due a refund?*

Things to know...

- **Where does RAS submit the Residual/Refund forms?**
 - *The forms are located in Compass.*
- **Where does RAS submit the closeout packet?**
 - *All PACT closeout packets should be submitted via Salesforce*
- **Does RAS need to submit an ‘Inactivate Speedtype’ form with the closeout packet?**
 - *No, this will be completed by FGC once all closeout items have been completed.*
- **How will RAS know when the Award is closed?**
 - *FGC will notify RAS Analyst via email once the Speedtype as been Inactivated, Project Archived, Contract Closed, and Award Closed.*



COMPASS CONTRACT TYPES



Compass Contract Types

CR_LOC	Cost-Reimbursable Letter of Credit	Require Emory to incur costs before being reimbursed. No invoice required, draw down of funds from sponsor system. FSR generally required.
CR_NON_LOC	Cost Reimbursable NON Letter of Credit	Require Emory to incur costs before being reimbursed. Invoice required. FSR generally not required.
CR_CONTRACT	Cost Reimbursable NON Letter of Credit for Federal Contracts	Awards that require Emory to incur costs before being reimbursed. An invoice is required for costs incurred within time period and is often based on task order. Invoice frequency is determined by funding source. Expenditures are generally on ledger to be included in invoice. Annual or entire award budget is added during Set Up process. Financial Report is generally NOT required.
AUTO SCHED PAY	Auto Scheduled Payment	DO NOT require Emory to incur costs before being reimbursed. No invoice required, payments made on pre-determined schedule. FSR may be required.
SCHED PAY	Scheduled Payment	DO NOT require Emory to incur costs before being reimbursed. Invoice IS required, but predetermined frequency and amount by funding source. FSR generally not required.

Compass Contract Types (cont.)

SCHED PAY TASK	Scheduled Payments – Task	DO NOT require Emory to incur costs before being reimbursed. Invoice IS required, but predetermined frequency and amount by funding source. FSR generally not required.
HYBRIDS	Part FIXED fee and Part Cost Reimbursable (CR)	Require Emory to incur costs before being reimbursed for the CR portion. Fixed Fee invoiced by RAS/Dept based on award requirements. FSR may be required.
CLINICAL TRIALS	Used for all awards where the research purpose has been defined as Clinical Trial.	DO NOT require Emory to incur costs before being reimbursed. Industry Sponsored - Invoiced and submitted to sponsor by OCR/RAS/Dept. with copy to FGC. Federal – Invoice generated and submitted to sponsor by FGC. FSR is required for federal awards. FSR may be required for industry sponsored awards.
DEPT TO INVOICE	Used for awards where the Department is responsible to bill for items, not on ledger.	May require Emory to incur costs before being reimbursed. Invoice created by RAS/Dept and submitted to sponsor with copy to FGC. FSR may be required.
OTHER	This type represents all other contracts not identified above; generally used infrequently.	Sponsor invoicing requirements will be outlined in the award.



PAYMENT MANAGEMENT SYSTEM (PMS) TRANSITION

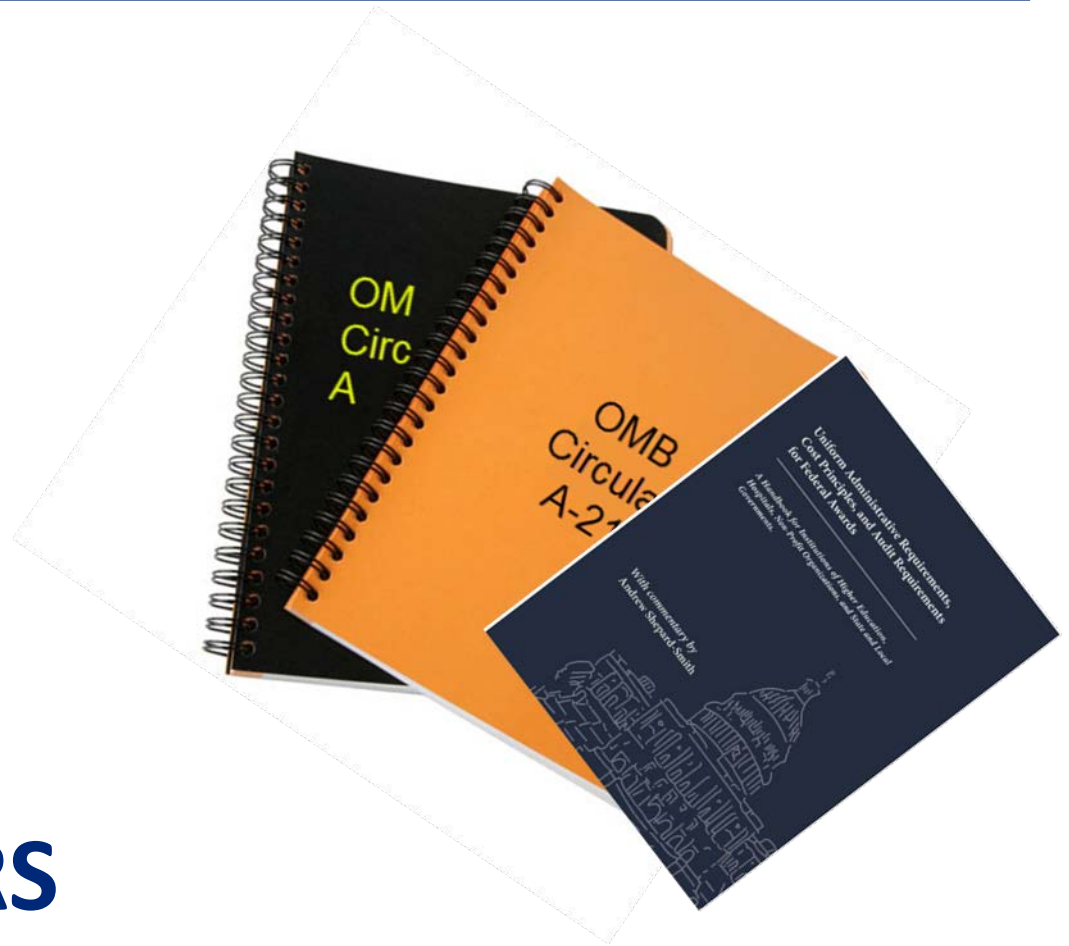
PMS System Transition

- NIH issued all new awards under the new subaccount system – currently referred to as ‘P docs’.
- **Between October 1, 2015 and September 30, 2016, all remaining DHHS Letter of Credit (LOC) awards transitioned to subaccounts (P docs) as their budget year ended:**
 - HHS has visibility of draws by award
 - In most cases, the ability to draw will be turned off 120 days after award end date
 - All awards transitioned by September 30, 2016
 - Total population was just over 150 awards
- **Generally, funds must be drawn down within 90 days of the end of the award.**
 - FFRs must be submitted on time to avoid loss of reimbursement
 - Funds will not be available after 120 days

PMS System Transition (cont.)

- **A new Emory contract number was issued in the Peoplesoft Financial system (COMPASS) prior to the budget year end date.**
 - First priority – clear deficits on affected awards
 - RAS Central Team worked with OSP to request PANs
- **Subawards may be terminated and reissued under new award.**
- **Core Facility and other feeder charges need to ensure that their charges are processed timely and correctly (within 30 days).**
- **A Subaccount Transition FFR was required for each award.**
 - Most FFRs for awards with automatic carryover were prepared by RAS Central team.
 - Unobligated balances on awards with automatic carryover were transferred to new award by RAS Central team.
 - Carryover requests to the funding agency are required for awards without automatic carryover (no change).
- **No change in Progress Report due dates.**

OMB CIRCULARS



OMB Circulars

The Uniform Guidance - Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards

- This guidance is applicable for Federal agencies December 26, 2013
- <https://www.federalregister.gov/articles/2013/12/26/2013-30465/uniform-administrative-requirements-cost-principles-and-audit-requirements-for-federal-awards>
- <http://osp.emory.edu/ugep/>

The Office of Management and Budget “Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards; Final Rule” was released in the Federal Register on December 26, 2013 (2 CFR Chapter I, Chapter II, Part 200, et al.). Per the OMB webpage this guidance “will supersede requirements from OMB Circulars A-21, A-87, A-110, and A-122 (which have been placed in 2 C.F.R. Parts 220, 225, 215, and 230); Circulars A-89, A-102, and A-133; and the guidance in Circular A-50 on Single Audit Act follow-up.”

OMB Circulars

Agency Implementation of Uniform Guidance

- **National Institutes of Health (NIH)**
 - [NIH Interim Grant General Conditions](#) (effective December 26, 2014)
 - See also: [FAQs on Uniform Guidance and NIH Interim Grant Conditions](#)
- **National Science Foundation (NSF)**
 - [NSF's Proposal & Award Policies and Procedures Guide \(PAPPG\)](#) (effective January 1, 2017)
 - See Also: [NSF's Document library](#) for the PAPPG for proposals due and awards made before January 1, 2017.
 - [NSF's Summary of Significant Changes and Clarifications to the PAPPG](#)

OMB Circulars

- https://obamawhitehouse.archives.gov/omb/circulars_default/
 - **A-21 - Cost Principles for Educational Institutions**
 - Relocated to 2 CFR, Part 220
 - **A-110 - Uniform Administrative Requirements for Grants and Other Agreements with Institutions of Higher Education, Hospitals and Other Non-Profit Organizations**
 - Relocated to 2 CFR, Part 215
 - **A-133 - Audits of States, Local Governments and Non-Profit Organizations**
-

OVERVIEW OF PROJECT AND AWARD CLOSEOUT TOOL PACT



PACT Definition/Description

The **Project and Award Closeout Tool (PACT)** template is designed to streamline the final closeout review process and is available to central, departmental, and RAS research administrators across campus.

- It is prepared by the RAS unit on behalf of the Principal Investigator (PI), and submitted to the Office of Finance: Grants & Contracts (FGC) as part of the closeout package.

As of April 1, 2014, a **PACT is required for final closeout of all sponsored awards (invoiced, reported, or otherwise). The **PACT** is required as a part of the final package that is reviewed and approved by authorized university officials.*

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Award #:							Import: EUOGC015						
Sponsor Name:											In Compass run the Emory Custom Report EUOGC015 in the distribution In Outlook save the EUOGC015 to your working drive		
Dept:													
Contract Type:													
(DEPT/RAS)	(DEPT/RAS)	(DEPT/RAS)	(DEPT/RAS/FGC)	(FGC)	(FGC)	(FGC)	(FGC)	(FGC)	(FGC)	(FGC)			
Deficits (OLTs)	Refunds/ Residuals [25700]	Encumbrances	Budget = Expense	Expenses = BLDs	BIL/DEF Project Resources	Expenses = Revenue	Cash [11000]	Unbilled AR G/L [14660]	Billed AR [14650]	Open Invoice Balances	Project (Award Profile)	Activity ID (Speedchart Maintenance)	Proposal (Maintain Proposal)
			-	-	-	-							

How Does the PACT Work?

An Excel template **with the following tabs:**

- A **DEFICIT** column that aggregates every project, but does not include any manual adjustments (Dept/RAS - pink).
- A **REFUNDS/RESIDUALS** column that highlights the potential need for a refund or residual (Dept/RAS - pink).
- An **ENCUMBRANCE** column that highlights open encumbrances for the award (Dept/RAS - pink).
- A **BUDGET = EXPENSE** column that highlights variances where budget does not equal expense for the award (Dept/RAS/FGC – Purple).

(DEPT/RAS)	(DEPT/RAS)	(DEPT/RAS)	(DEPT/RAS/FGC)	(FGC)	(FGC)	(FGC)	(FGC)	(FGC)	(FGC)	(FGC)
Deficits (OLTs)	Refunds/ Residuals [25700]	Encumbrances	Budget = Expense	Expenses = BLDs	BIL/DEF Project Resources	Expenses = Revenue	Cash [11000]	Unbilled AR G/L [14660]	Billed AR [14650]	Open Invoice Balances

PACT Template & Closeout Checklist

Award #:	
Sponsor Name:	
Dept:	
Contract Type:	

Import: EUOGC015

(DEPT/RAS)	(DEPT/RAS)	(DEPT/RAS)	(DEPT/RAS/OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)
Deficits (OLTs)	Refunds/Residuals [25700]	Encumbrances	Budget = Expense	Expenses = BLDs	BIL/DEF Project Resources	Expenses = Revenue	Cash [11000]	Unbilled AR G/L [14660]	Billed AR [14650]	Open Invoice Balances
			-	-	-	-				
			-	-	-	-				
			-	-	-	-				
			-	-	-	-				

Step #	Description	v or Not Applicable (NA)	Refer to	Record Values/Notes Here for Future Reference
1.	RAS/DEPT Deficits (OLTs)		Clear deficit to final reported expenditures to sponsor.	
2.	RAS/DEPT Refunds/Residuals		Check terms and conditions for disposition of unobligated balance. If we are allowed to keep remaining funds, complete the 'Request for Residual Balance Transfer Form'. If the funds need to be returned to the sponsor, complete the 'Request for Refund Form'. Submit the form to the appropriate OGCA Team Help Desk.	
3.	RAS/DEPT Encumbrances		Remove Encumbrances. Any issues contact Emory A/P.	
4.	RAS/DEPT/OGCA Budget=Expense		Does the Expenses on Ledger = the Final Reported Expenditures to Sponsor? If Expenses > Budget = Possible Deficit. Deficit needs to be removed. If Expenses < Budget = Possible Budget Adjustment completed by OGCA.	



ROLES AND RESPONSIBILITIES

RAS Steps in the Closeout Process

1. Identify Monthly Workload

- Monthly Deadlines
- RAS/FGC deliverables

2. Prepare the PACT Template

- Download PACT template
- Run Compass 15 Report
- Import into PACT template
- Analyze PACT columns
 - Deficits
 - Refunds/Residuals
 - Open Encumbrances
 - Budget = Expenses

3. Analyze Awards

- Closeout Checklist
- eNOA/NGA
- Contracts Workbench
- Cash
- Milestones and Notes
- Final FSR/Invoice

4. Prepare and submit adjustments

5. Submit completed, approved package to RAS Director for approval

6. **Submit completed, approved package to FGC via Salesforce**

7. Update RAS Milestone

FGC Steps in Closeout Process

1. Identify Monthly Workload

- Monthly Deadlines
- RAS/FGC deliverables

2. Verify PACT package is received

- Initial review of PACT and supporting documentation including copies of all refunds/residual requests, pending Journals, RSTs, Subcontract Invoices, etc.

3. In-depth Analysis of Awards

- Identify all variances between PACT and General Ledger especially where Contracts Workbench expenses \neq PACT expenses \neq PMS Disbursed \neq Final FSR/Final Invoice submitted

4. Submit completed package to FGC Financial Manager for review & approval

5. Compass Updates

- SpeedType Inactivated
- Project Archived
- Contract Closed
- Award Closed

6. RAS Notified

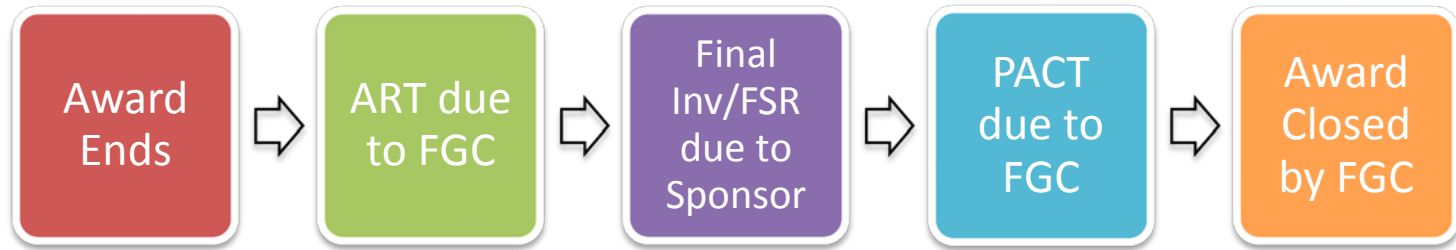
7. Scan PACT package to I drive

8. Update FGC Milestone



COMMON CLOSEOUT TIMELINES

Closeout Timelines



[Award](#) | [Funding](#) | [Resources](#) | [Certifications](#) | [Terms](#) | [Milestones](#) | [Key Words](#) | [Funding Inquiry](#) | [Invoice Milestones](#) | **FSR Milestones**

Award ID: 0000025027 Reference Award Number: 567052/10043900/1076
 Start Date: 09/15/2014 Contract Type: CR_NON_LOC Contract Status: ACTIVE Hold: N
 End Date: 06/30/2016 Department: 816000 SPH: Global Health
 Customer: 00003513 UNIVERSITY OF PENNSYLVANIA

Financial Report Completer: Tate, Lisa
 Financial Report Approver: Cohee, Nicole

[Terms and Conditions](#)

Milestone Detail Find | View All First 1 of 2 Last

Milestone: CLOSE Compass Closeout Code: CCCZ Compass Closeout Zero Balance

*Period from: 09/15/2014 *Period to: 06/30/2016

Status Date	Action	Total Authorized Budget	Total Expenses Reported	Comments	Notes	Status	Unobligated Balance	Carryover	Due Date	Completion Date	Completed by	Oprid	Date/Time
01/26/2016	RAS	0.00	0.00	H. Closeout pkt sent to F	Notes		0.00	0.00	09/28/2016		CKEELEN		01/26/2016 10:05:56AM
01/26/2016	FGC	0.00	0.00	M. Inactivate SK and clos	Notes		0.00	0.00	11/27/2016		CKEELEN		01/26/2016 10:05:56AM

Please note: Research Administration leadership at Emory has determined the milestones for existing awards will remain at 90 days for financial reporting. This also applies to all new awards with greater than 90-day reporting.

PACT Objectives Revisited



- **Describe** the overall Closeout process for Emory University.
- **Define** the role of both Research Administration Services (RAS) and Finance: Grants and Contracts (FGC) in the Closeout process.
- **Identify** the timelines associated with Closeout.

Questions?



Quick Break – 10 minutes



HANDS-ON DEMONSTRATION & PARTICIPATION



AWARD 0000035257 (NIH R01 FINAL FFR)

RAS Steps in the Closeout Process



Where to find PACT Training Materials?

Visit FGC's Website at:
fgc.emory.edu

Click on the **Training** menu.

Click on **Training Documents** in the side menu

Click on **PACT Training Material** to expand the section and access **PACT Training** resources.

The screenshot shows the Emory University Finance: Grants and Contracts website. The top navigation bar includes links for SCHOOLS, LIBRARIES, RESOURCES, and DIVISION OF FINANCE. The main header features the Emory University logo and the text "EMORY UNIVERSITY | Finance: Grants and Contracts". Below the header is a horizontal menu with tabs for ABOUT, POLICIES, FORMS, SYSTEMS, REPORTING, and TRAINING. The TRAINING tab is highlighted with a red border. On the left side, a vertical sidebar menu contains "Training", "Training Documents", and "Emory's Research Certification (eRAE)". The "Training Documents" item is highlighted with a red border. The main content area displays the breadcrumb "Home » Training » Training Documents" and the heading "Training Documents". A paragraph of text explains that as of June 23, 2014, ART and PACT training materials are available online. Below this text are three buttons: "ART Training Materials »", "PACT Training Materials »", and "RAE Training Materials »". The "PACT Training Materials »" button is highlighted with a red border and has a mouse cursor pointing to it.

PACT Training Materials & Job Aids

Visit FGC's Website at:
fgc.emory.edu

Click on the **Training** menu.

Click on **Training Documents** in the side menu.

Click on **PACT Training Material** to expand the section and view the listed **Job Aids** available

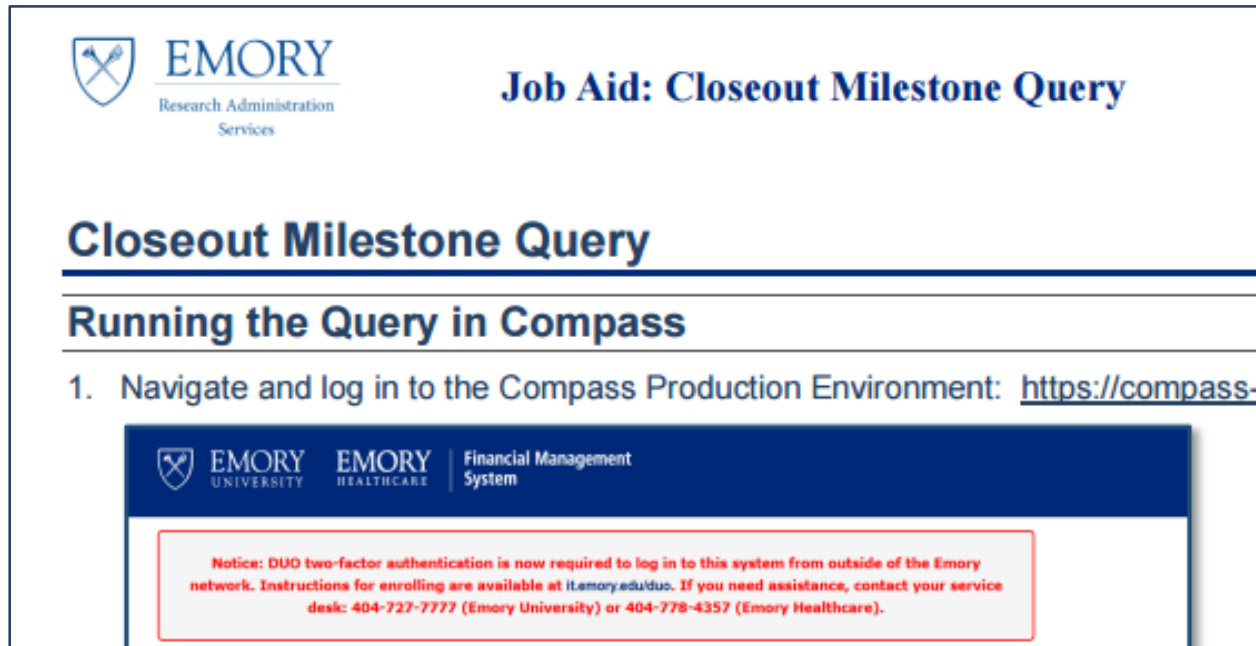
Course Name	Training Resources
Closeout	<ol style="list-style-type: none">1. Powerpoint<ul style="list-style-type: none">• Closeout Overview PowerPoint2. Overview/Process Maps<ul style="list-style-type: none">• RAS FGC PACT Summary Process Map• Compass Contract Bill Plan Types• FSR Types• Handout: RAS Steps in the PACT Process• Handout: FGC Steps in the PACT Process3. Job Aids<ul style="list-style-type: none">• Closeout Checklist• Job Aid: Project & Award Closeout Tool (PACT)• Job Aid: Closeout Milestones Query

[Link to PACT](#)

Determine Closeouts Due



Run the **Closeout Milestone Query** and follow the steps outlined in the Job Aid:



EMORY
Research Administration
Services

Job Aid: Closeout Milestone Query

Closeout Milestone Query

Running the Query in Compass

1. Navigate and log in to the Compass Production Environment: <https://compass->

EMORY UNIVERSITY | **EMORY HEALTHCARE** | Financial Management System

Notice: DUO two-factor authentication is now required to log in to this system from outside of the Emory network. Instructions for enrolling are available at it.emory.edu/duo. If you need assistance, contact your service desk: 404-727-7777 (Emory University) or 404-778-4357 (Emory Healthcare).

Located at:

fgc.emory.edu > Training > Training Documents > PACT Training Materials > Closeout Milestone Query

Run Compass Report - 15



Review **Job Aid: PACT** and follow steps beginning on page 4:

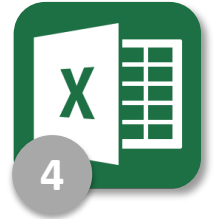
Job Aid: Project and Award Closeout Tool (PACT)



Located at:

fgc.emory.edu > Training > Training Documents > PACT Training Materials

Download PACT Template



FGC.EMORY.EDU > Award Management Tools > PACT

[Download PACT](#)

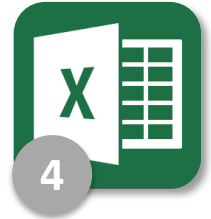
[Training](#)

Using Chrome, Internet Explorer, or Firefox download the most current version of the ART template below.

Please Note: Prior to using the PACT template you should attend training. A current checklist is provided below as well and will assist you in preparing the PACT.

- [PACT - Project & Awards Closeout Tool](#)
- [Closeout Checklist](#)

Preparing the PACT

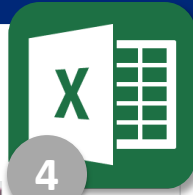


Import the 15 Compass Report saved on your workspace

- See JOB AID: PACT, beginning on page 13

	A	B	C	D	E	F	G	H	I	J	K
1	Award #:										
2	Sponsor Name:										
3	Dept:										
4	Contract Type:										
5											
6	(DEPT/RAS)	(DEPT/RAS)	(DEPT/RAS)	(DEPT/RAS/OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)
7	Deficits (OLTs)	Refunds/Residuals [25700]	Encumbrances	Budget = Expense	Expenses = BLDs	BIL/DEF Project Resources	Expenses = Revenue	Cash [11000]	Unbilled AR G/L [14660]	Billed AR [14650]	Open Invoice Balances
8				-	-	-	-				
9				-	-	-	-				
10				-	-	-	-				
11				-	-	-	-				
12				-	-	-	-				
13				-	-	-	-				
14				-	-	-	-				
15				-	-	-	-				
16				-	-	-	-				
17				-	-	-	-				
18				-	-	-	-				
19				-	-	-	-				
20				-	-	-	-				
21				-	-	-	-				

Analyze PACT Columns



Import: EUOGC015

Award #:											
Sponsor Name:											
Dept:											
Contract Type:											
(DEPT/RAS)	(DEPT/RAS)	(DEPT/RAS)	(DEPT/RAS/OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)	(OGCA)
Deficits (OLTs)	Refunds/Residuals [25700]	Encumbrances	Budget = Expense	Expenses = BLDs	BIL/DEF Project Resources	Expenses = Revenue	Cash [11000]	Unbilled AR G/L [14660]	Billed AR [14650]	Open Invoice Balances	
			-	-	-	-					
			-	-	-	-					
			-	-	-	-					
			-	-	-	-					
			-	-	-	-					

Step #	Description	V or Not Applicable (NA)	Refer to	Record Values/Notes Here for Future Reference
1.	RAS/DEPT Deficits (OLTs)		Clear deficit to final reported expenditures to sponsor.	
2.	RAS/DEPT Refunds/Residuals		Check terms and conditions for disposition of unobligated balance. If we are allowed to keep remaining funds, complete the 'Request for Residual Balance Transfer Form'. If the funds need to be returned to the sponsor, complete the 'Request for Refund Form'. Submit the form to the appropriate OGCA Team Help Desk.	
3.	RAS/DEPT Encumbrances		Remove Encumbrances. Any issues contact Emory A/P.	
4.	RAS/DEPT/OGCA Budget=Expense		Does the Expenses on Ledger = the Final Reported Expenditures to Sponsor? If Expenses > Budget = Possible Deficit. Deficit needs to be removed. If Expenses < Budget = Possible Budget Adjustment completed by OGCA.	

Compass Project.Activity Status

NOTE: A new feature in Compass 9.2 is the use of **Activity ID Status** to control charges posting to sponsored projects after the end date of the project.

- This feature is working as expected and stops transactions from posting to projects with an Activity ID Status of FINAL even if the PROJECT Status is OPEN.
- As you can see by the graphic below, this status impacts all forms of transactions (Journal Entries, RSTs, and Emory Express).

Compass 9.2

Enabling Status Control allows the system to manage based upon Analysis Type (All modules except Treasury)

Compass 9.2

Warning message will provide a status and allow to proceed.

Compass 9.2

Reject message will provide a status and prevents the transaction.

Activity Status Control

Activity Status will control the transactions

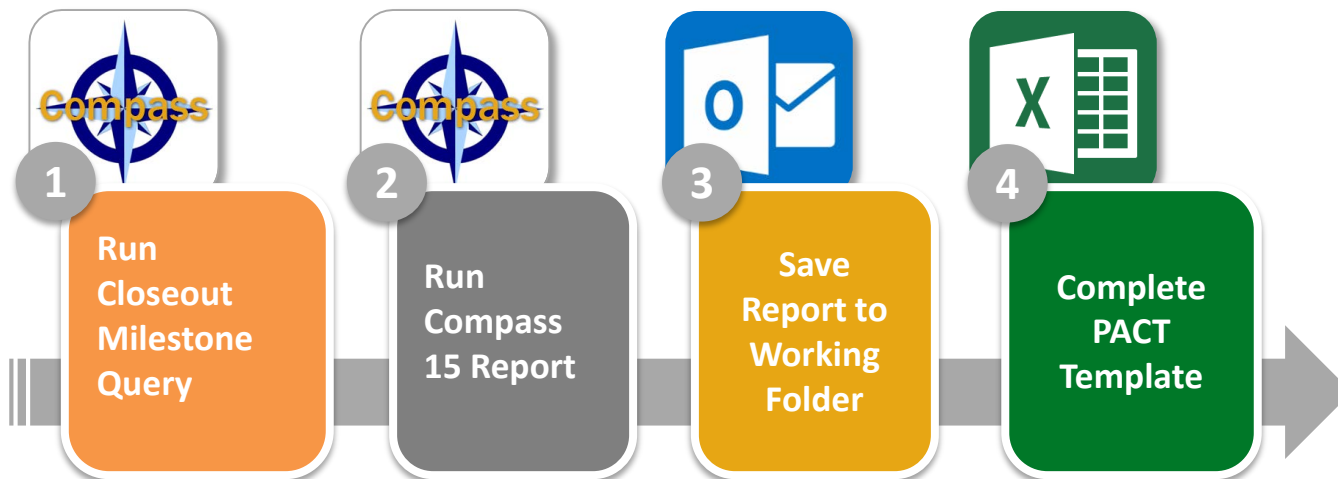
Project & Activity			
Status	Level	Transaction	Message
Pending	Activity	Budget	
		All Others	Reject
Open	Project & Activity	All	
Ended	Activity	New PO's	Reject
		All others	Warning
Closed	Activity	PO, AP, EX, Payroll, RST	Reject
		Journals & Budget	Warning
Hold & Final	Activity	All	Reject
Archived	Project	All	Reject

RAS PACT Package

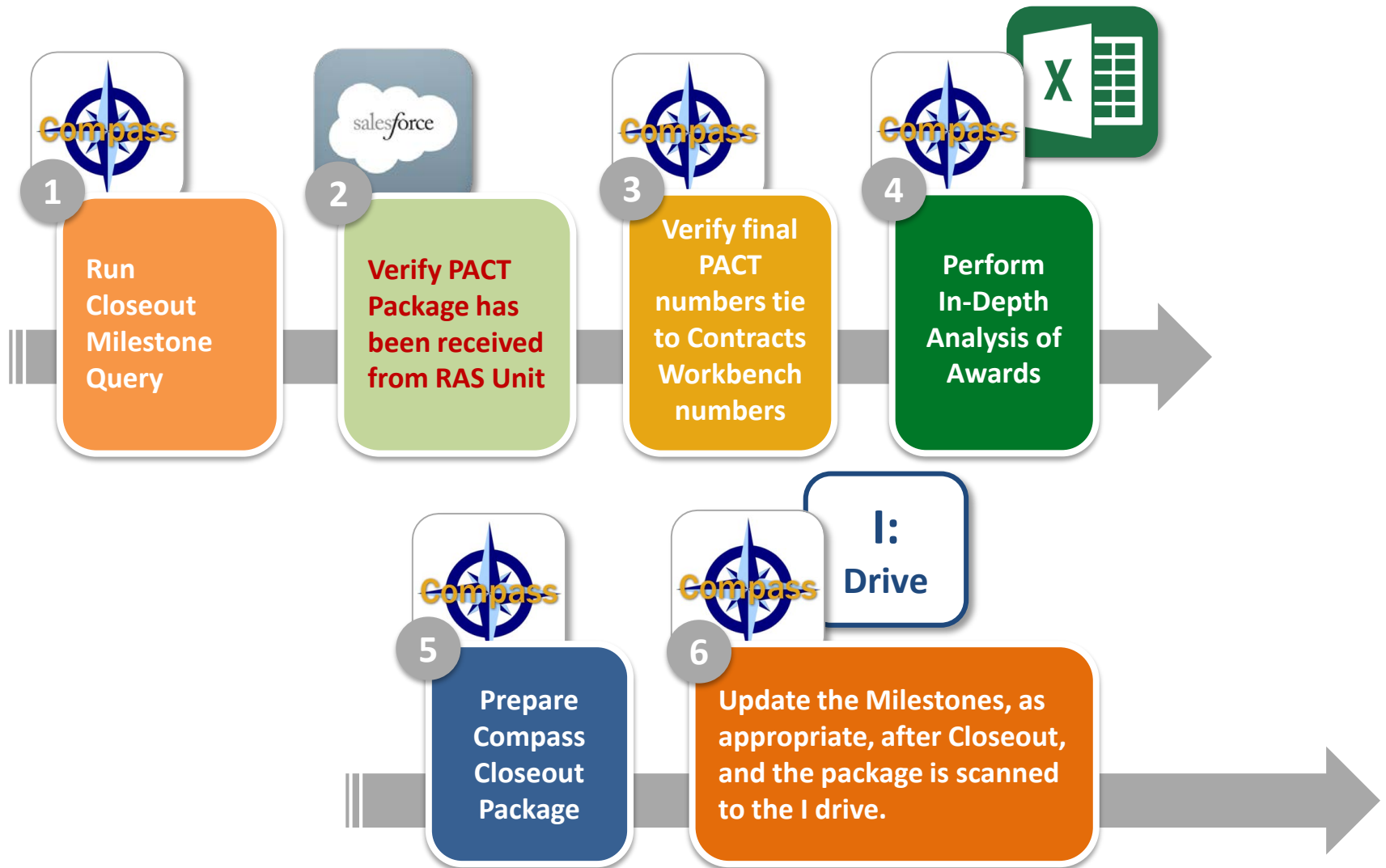
ANALYZE



RAS Steps in the Closeout Process



FGC Steps in the Closeout Process



Questions?



Quick Break – 10 minutes



HANDS-ON DEMONSTRATION & PARTICIPATION



AWARD 0000027413 (FINAL INVOICE)

FOLLOWING THE PREVIOUS STEPS ABOVE, GENERATE A PACT FOR THE FINAL INVOICE AS LISTED ABOVE

Participant Practice

Following the previous steps above, generate a PACT for the FSR/Final Invoice Award brought to class.



Participant Practice

Following the previous steps above, generate a PACT for the FSR/Final Invoice Award brought to class.



ADDITIONAL HANDS-ON DEMONSTRATION & PARTICIPATION



AWARD **0000027954** (NIH T32 AFSR)

AWARD **0000026378** (NIH U54 FFSR)

Questions?



THANK YOU!