Step 3.4: Award Review for Closeout (Stage 1)

**Purpose:** To identify accounts that either need to be extended or closed

**Parties Involved:** Principal Investigator, Research Administrators, Specialist III, C&G Accountants, Funding Agency (if applicable)

Steps in the Process:

- C&G provides a 30/60/90 spreadsheet monthly via email
  - Specialist confirms account closing with RA and or PI.
  - Specialist reviews list and confirms if the accounts are closing or extended.
  - Specialist checks NOGA, NOA and PeopleSoft to confirm dates.
- ORSP and C&G will proceed to Stage 2 for all accounts identified for closeout.

**Summary Description:** To be more efficient and pro-active on closeouts and no cost extensions.

Date: 03/17/2015