Form To Request Close of GRANT or PROJECT
(one Grant/Project per Form)

Grant/Project Number:
Grant/Project Description:
Grant/Project End Date:
Name of Requestor:
Signature of Requestor:

- Make sure a zero balance is showing on Grant/Project
- Make sure Grant is not funding payroll
- Send Request Form to Al Lagos, Financial Systems

For Financial Systems Staff:

Chart of Accounts Maintenance in Closing Grants/Projects:

Verify Zero Balance [Run Grant Balance Query]
Verify NOT in current process in Travel System
CS9: Inactivate Commit Accounting used as Payroll Funding Source (Query: TU_FIN_GRANT_LOOKUP)
CS9: Hiring Department Lookup Table – Inactivate Status – Delete Department Field
CS9: Item Type in Student Financials: if used, re-direct funding [TUSF_DEPTS_WITH_ITEMTYPES]
FS9: Inactivate in PeopleSoft
FS9: Delete Speedtype
FS9: Inactivate SpeedChart
Status Column Check on COA Master Spreadsheet
Notification for PeopleSoft Allocations Month End Run
Date completed:
Initials: