

Projects with expiring budget periods will receive a notification to the fiscal officer and primary investigator 60 and 30 days before the project is scheduled to end.

Upon notification, departmental personnel should review each project to determine whether the award is ending or the budget period is ending. If it is the latter and further funding has been secured, departments should simply review the award notices to determine if any reports are due and verify that monthly reconciliation is current and accurate.

If the award is ending, the following steps should be undertaken:

- Notify Office of Research Services (ORS) immediately if a No Cost Time Extension is required.
- Verify that monthly reconciliation is up to date and accurate. Notify ORS of any expenses which are not valid on the MoCode(s) to which they have been posted.
- Transfer invalid or unallowable expenses to another chartfield within 60 days or half of the reporting period of the grant, whichever comes first.
- Assess subcontracts to ensure invoices covering the entire budget period of the subcontract have been submitted. Contact the subcontractor to obtain invoices if incomplete.
- Reconcile capital equipment to the Asset Management system.
- Assemble all relevant data concerning cost-share, in-kind matching, and program income and forward copies of documentation to ORS.
- Review award terms to ensure compliance with the requirements of the sponsor and that all deliverables have been submitted.
- Draft final technical report and submit in a timely fashion (This also applies to invention statements and other special reports sponsors may request.)
- Submit copies of technical and other reports to ORS. (If the technical report is lengthy, the first 3 pages will suffice.)
- Provide final direct cost figure to ORS within half of the reporting period for the award. (If the final financial report is due 45 days from end date, department has approximately 23 days to provide final figures. If it is due 30 days from end date, department has 15 days, etc.) Please note that any expenses which post after the final report was submitted and which were not included in the department's estimate will not be eligible for reimbursement. These will need to be moved to a department account within 30 days.
- Change Personnel Action Forms (PAF) in the month prior to the end date so that payroll no longer posts to a grant which has ended.
- Work with Procurement to clear all encumbrances, including payroll, purchase orders, non-purchase order vouchers, and ProCard expenses.

- Provide notice of patents and/or inventions derived from the grant to ORS and the sponsor.
- If further funding will be provided on a new project, submit Pre-Award request to ORS and begin transferring all relevant expenses to that chartfield.

These requirements may be modified or augmented by ORS based on the requirements of particular grant notices and/or sponsors.