120 DAYS BEFORE GRANT END

- Monitor spending and budget variances to uncover underspending and potential overspending.
- Review status of grant-funded personnel. Provide employees who may terminate due to this account's expiration written notice within 30 days (operating staff), 60 days (post-docs) or 90 days (PAT staff).

90 DAYS BEFORE GRANT END

- Ensure that all technical reports are current and up-to-date. If the award will be extended or renewed, email your GCA.
- Contact sub-awardees to remind them of the date by which final reports and a final invoice (clearly marked as “Final”, including cost share as applicable) must be received to ensure payment.
- Review planned purchases, including equipment, to ensure expenses will post to the award in the month before the final invoice is due.

30-60 DAYS BEFORE GRANT END

- Review financial status of the funds to ensure final expenses are allowable, allocable, reasonable and consistent with the terms of the award.
- Finalize documentation of required cost share, including in-kind contributions, in Banner or by memo to SPA.
- Ensure that any invention or patent disclosures have been sent to UNHI.
- Ensure any prior approval requirements have been received from the sponsor.

GRANT END – 45 DAYS AFTER GRANT END (if closing period is 90 days)

- Verify that all of the required technical reports during the award were submitted and that the final technical report is in progress and will be completed before the deadline.
- Confirm salary amounts are correct.
- Collect, review, and pay all final invoices (subawards, purchase orders, procurement card purchases, travel reimbursements).
- Finalize publication costs after the award end date.
- Verify that all expenditures are allowable, allocable, reasonable and consistent with the terms of the agreement.
- Ensure unused supplies inventory is less than $5,000
- Close all non-HR encumbrances.
- Ensure salaries stop charging at grant end date. Close payroll encumbrances.
- Provide P-card administrator with new fund for P-card(s) if the default was this fund.
- Transfer remaining revenue to cover the direct costs in any 15C cost share account.
- Provide service centers with new fund for recurring charges like telephone, copier, postage.
- Move the grant in workflow.