Closeout Tools Update
Overview

Automated Closeout Tools & Reports are Now Available

» How’s the transition going?
» What questions are we hearing?
» What should you keep in mind?
» Where can you find help when you need it?
Closeouts Submitted in 1\textsuperscript{st} Week

18

Keep up the good work!

On-time Submissions? 18

YOU ARE THE BEST!
FIRST CLOSEOUT SUBMISSION!

Tiffany Cervi!
Frequently Asked Questions

» Why is PI Attestation giving me an error regarding my balance?
  » Report in whole dollars only

» How do I resolve the cost overrun?
  » In most cases OSP will move it to the backstop code
  » Record the amount appropriately
Frequently Asked Questions

» Why did my travel expense transfer off if the Tasklist hasn’t been approved?
   » Late Activity begins at time of Tasklist submission by the GM/initiator

» Why am I getting a delinquent notification if I submitted the Tasklist on the due date?
   » Department Approver must approve the tasklist to be considered timely
Key Points in the Closeout Timeline

- **GM initiates Tasklist**
  - -90 days before Proj End Date
- **GM submits Tasklist**
  - -60 days before Proj End Date
- **GM submits PI Attestation**
  - -60 days before Proj End Date
- **Late Activity & Transfer-Off activated**
  - -30 days before Proj End Date
- **PI approves PI Attestation**
  - Closeout Due Date
- **I-Team approves Tasklist**
  - Closeout Due Date
- **Ad-Hoc & Dept Approvers approve Tasklist**
  - Sponsor Due Date
- **Timeliness of submission is recorded**
- **WBSE Closed**

**NOTE:** OWS not shown but must be routed prior to Tasklist submission
Reminders

» Process hasn’t changed
   » Start 90 days prior to project end date (or before), be proactive
   » Continue to run Duke@Work reports throughout the process
   » Manage late activity via email notifications due to their time sensitivity

» Prepare for new elements impacting closeout
   » Coordinate & communicate with involved parties
   » Duke@Work downtime – next occurrence starts Friday at 4:pm
   » Implications of fiscal year end deadlines and activities
Reminders

» CONS notifications are based on WBSE end date
» PI Attestation will generate at day -90
» PI Attestation must be submitted prior to Tasklist
» Monitor submissions using the new tools & reports
Learning Opportunities

» RCC Class: Project End & Closeout
  » May 30-31, 2017
  » 406 Oregon St., Room 101

» PAMC Closeout Tools Workshops
  » June 6, 2017
  » July 20, 2017
  » 406 Oregon St., Room 101

Both are available for registration via LMS and qualifies as CE credits
Any questions?

Email: Campus-implementation@duke.edu

http://finance.duke.edu/training/index.php#topic

Navigation Option:
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