Internal Award

Professional Development Pathways

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Facilitator Information

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Welcome

- Define Internal Award
- Review the Structure of Project-Task-Award (PTA)
- Demonstrate User Entry
  - Create a Project
  - Create a Task
  - Create an Award

Course Objectives

- Define Project-Task-Award
- Login and Navigate Oracle
  - Search for an existing Project
- Create a Project
- Create Task(s)
- Add an Award
  - Establish Funding and Budget
- Describe Closeout of Internal Awards

Grants Accounting Module

Lesson Objectives

By the end of this lesson, you will be able to:

- Recognize Internal Award Types
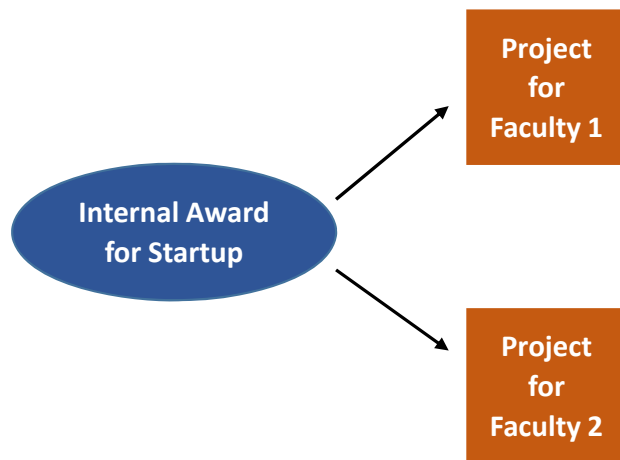- Define Multi-funding Concept

Grants Accounting Module

- Grants Accounting Module tracks activity by Project-Task-Award
  - Project represents the faculty member or department
  - Task represents the type of award used to organize expenditures
    - Startup, Research Incentive, HTC, PURF, etc.
  - Award represents the source of internal funding
    - University funds or Foundation funds
      - Planning Unit Startup Funds, Vice President for Research SEA awards, Foundation 1804 awards, etc.

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Grants Accounting Module

- **Sponsored Award**: externally funded
  - National Science Foundation, National Institutes of Health, etc.
- **Sponsored Cost Share Award**: internally and externally funded
  - Internally funded – Principal Investigator's salaries and wages, and benefits
    - Must be funded at the time of the Award
- **Capital Projects**: internally and externally funded and allow different project funding options
  - Construction projects for buildings, other infrastructure and capital improvements
- **Internal Awards**: internally funded - managed by the Planning Unit
  - Startup, Research Incentive, Research Challenge, Departmentally funded research supplements, Professional Development for faculty, Honors Tutorial College, etc.

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Multi-funding Concept

Internal Award for Startup → Project for Faculty 1

Internal Award for Startup → Project for Faculty 2

- One Internal Award can fund multiple Projects
- Allows the Task to represent the type of award used to organize expenditures
  - Startup, Research Incentive, HTC, PURF, etc.

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One To Many Relationship
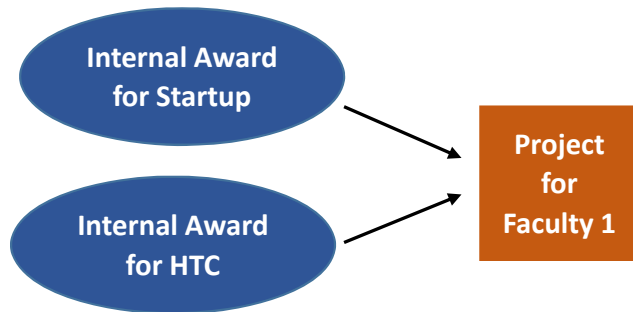
- Multiple Internal Awards can fund one Project
- Improved visibility of the source of funds
- View total Project spending

Lesson Summary

- Grants Accounting Module uses Project-Task-Award (PTA)
    - Adding the Award segment provides the ability to use one Project to track multiple sources of internal funds (multi-funding) or one Internal Award can fund multiple Projects
    - Task represents the type of award used to organize expenditures
        - Startup, Research Incentive, HTC, PURF, etc.

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Project-Task-Award

Structure

Lesson Objectives

By the end of this lesson, you will be able to:

- Define the segments in Grant Account structure

- Recognize standard Tasks for the Faculty Project for Internal Awards

- Recognize impact of Dates

Project-Task-Award Structure

- Grants Accounting structure is comprised of four segments
  - Each segment has a defined length and set of possible values

Project (5)	Task (5)	Award (7)	Expenditure Type (30)
Defines body of work	Work breakdown structure	Who or how it is being funded	Object Code with description
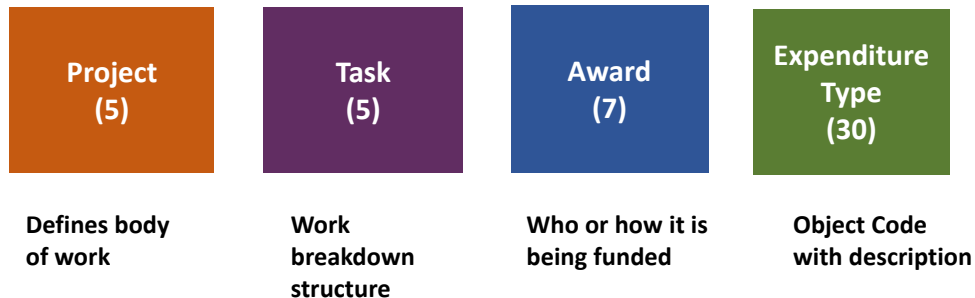
Project Segment

Project (5)

- Project represents a person or department with a single task or multiple tasks
- Planning Units are responsible for setting up Projects for their faculty or departments
- System-generated value, assigned in sequential order
  - Examples: 12000, 13000, 14000, etc.

Project Segment (cont.)

Project (5)

- Unique name limited to 30 characters, alphanumeric, ALL CAPS
  - Faculty Project: LAST NAME, FIRST NAME (EMPLOYEE ID)
  - Department Project: NAME OF DEPARTMENT (ORG #)

Project #	Project Name
12143	BERRYMAN, DARLENE E (115267)
12152	BURNETTE, DAVID DEAN (133817)
12452	AVIONICS (140901)
12465	CHAIR LINGUISTICS (100190)
13004	STEINBERG, ERIC (106854)
14737	FOX, MATTHEW (159980)

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Project Key Members

- Project Key Members exist to designate individuals responsible for a Project. A Project Manager is required for every Project

Key Member Roles	
Project Manager	1) Faculty Project: Enter Faculty Name (Last Name, First Name) 2) Departmental Project: Enter Director's name (Last Name, First Name)
Project Administrator	Optional – Enter Administrator Name (Last Name, First Name) NOTE: This is for query purposes on Award/Project Member field in the OBI Grants Funds Available and Summary Reports.
Administrative Support	Optional – Enter Administrator Name (Last Name, First Name) NOTE: This is for query purposes on Award/Project Member field in the OBI Grants Funds Available and Summary Reports.

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Task Segment

Task
(up to 5 digits)

- Task provides a way to organize expenditures
- Every Project must have at least one Task with up to 5 digits and a Task Name
  - Examples: 10, 13, 20, 20.01, etc.
- **Task Organization** summarizes accounting information to the **Organization** segment in the General Ledger
- **Task Service Type** summarizes accounting information to the **Activity** segment in the General Ledger

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Standard Tasks for Internal Awards

Task #	Task Name
1	Presidential Research Scholar
5	Baker Award
10	Internal Award
11	Kopchick Award
12	Research Challenge/OURC
13	Research Incentive
14 - 19	SEA - Student Enhancement Award
20 – 29	Startup - Planning Unit (PU) Startup = 20 Vice President for Research (VPR) Startup = 24
30 – 39	Provost's Undergraduate Research Fund (PURF)
40	Honors Tutorial
42	1804 Award
44	Konneker Award
46	Sugar Bush Award
48	OUF Internal Award
49	Innovation Strategy Awards
50 – 59	**Departmental Awards**
60 – 69	GSS Travel Research OW Award
80 – 99	**Departmental Awards**

Award Segment

Award (7)

- Award is how it is funded
  - Source of funding that supports Project(s)
- All Internal Awards are funded internally (within Ohio University or Foundation)
- **Award Type** summarizes to the **Source** segment in the General Ledger
- **Award Purpose** summarizes to the **Function** segment in the General Ledger (see examples below)

Award Purpose	Function
Instruction 10	10
University Research 20	20
Public Service 30	30

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Award Roles

- Award roles exist to designate individuals responsible for an award. An **Award Manager** is required for every award

Award Roles	
Award Manager	Department Administrator responsible for managing the award; there can only be one Award Manager per Award
Co-Award Manager	Co-manager of the award
Administrative Support	Administrative support for the award

Internal Award Types – Ohio University

University Award Type (Source)	Funding
INTERNAL AWARDS (112100)	Planning Unit
PU STARTUP FUNDS (112410)	Planning Unit
DEPARTMENTAL AWARD (112600)	Planning Unit
DEPT CHAIR FUNDS (112650)	Planning Unit
DEPARTMENTAL COMMITMENTS (112700)	Planning Unit
KOPCHICK ENDOW UG AWD (112102)	Vice President for Research
PURF AWARDS (112115)	Vice President for Research
SEA AWARDS (112120)	Vice President for Research
RESEARCH CHALLENGE (112300)	Vice President for Research
BAKER AWARDS (112350)	Vice President for Research
VPR STARTUP (112400)	Vice President for Research
HONORS TUTORIAL (112000)	Honors Tutorial College
RESEARCH INCENTIVE (112200)	Finance Setup
GSS TRV RES ORG WK AW (112500)	Graduate College

Internal Award Types - Foundation

Foundation Award Type (Source)	Funding
FSP OUF RUSS VISION (420980)	Foundation
FSP OUF KOPCHICK (420981)	Foundation
FSP OUF 1804 AWARD (420982)	Foundation
FSP OUF KONNEKER (420983)	Foundation
FSP OUF SUGAR BUSH (420984)	Foundation
FSP OUF BAKER AWARD (420985)	Foundation
FSP OUF OTHER AWARD (420986)	Foundation

Internal Award Number

- Example of Project-Task-Award **12143**-**13**-**4100001**
  - **Planning Units are responsible for determining the last 4 digits**

1st Digit	2nd – 3rd Digits	4th – 7th Digits
4	**10**	**0001**
4 = Internal Award	Planning Unit Number (10 = Arts & Sciences) Planning Unit Number is the first two digits of the ORG	Numbers assigned by Planning Unit
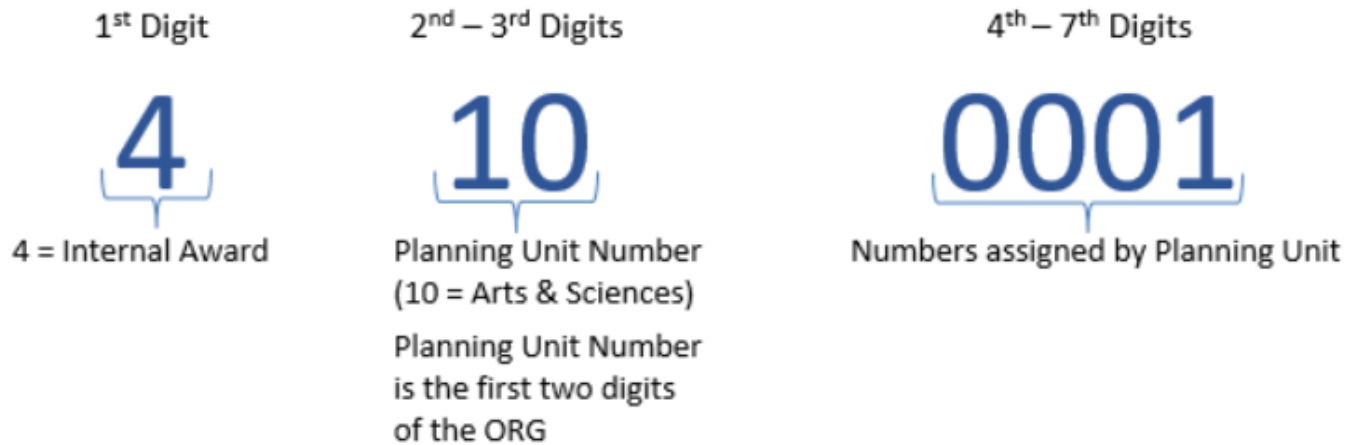
Expenditure Type

Expenditure Type (30)

- Expenditure Type is the type of goods or services being purchased
- **Expenditure Type** is equivalent to the **Object Code** in the General Ledger
  - Combination of Object Code Number and Name
    - Expenditure Type = 712410 Laboratory Supplies
    - GL Object Code = 712410
- **Expenditure Type** maps to **Expenditure Category**
  - Expenditure Category = Supplies

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Internal Award: Expenditure Categories

- Expenditure Category is used for Budgeting and for summary reporting in OBI

List of Expenditure Categories
Benefits
Debt Service
Equipment
Financing Costs
Occupancy and Maintenance
Other Operating Costs
Other Personnel Costs
Participants
Professional Services
Salaries and Wages
Student Aid
Subcontracts
Supplies
Travel

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Grants Transactions

- Expenditure item date: captures when a transaction is incurred (as opposed to when it is posted)
  - Invoices – invoice date
  - PCard – date of processing by bank
  - Expense Report – date of latest expense on the report
  - Payroll – check date
- Expenditure type
- Comments – used to capture description
- PA Date – identifies the month when the transaction was processed in Grants

Dates in Grants

- Dates on the Project-Task-Award control the expenditure item dates of transactions that can post to the PTA
  - Project
    - Project start date is required
    - End date is not required
  - Task
    - Task start date is required
    - End date is not required. End dates are used on Tasks for specific time periods
  - Award
    - Award start and end dates are required

Dates in Grants (cont.)

- How PTA Dates Work Together

When is a PTA Chargeable?

Project

Project status of Pending or Closed is not-chargeable

Project = Approved

Task = Chargeable

Award = Active or At Risk

Valid expenditure item date

Award

Award status of On Hold or Closed is not-chargeable

Valid date range is between: latest Start date and the earliest End date

Task

Task Chargeable box unchecked is not-chargeable

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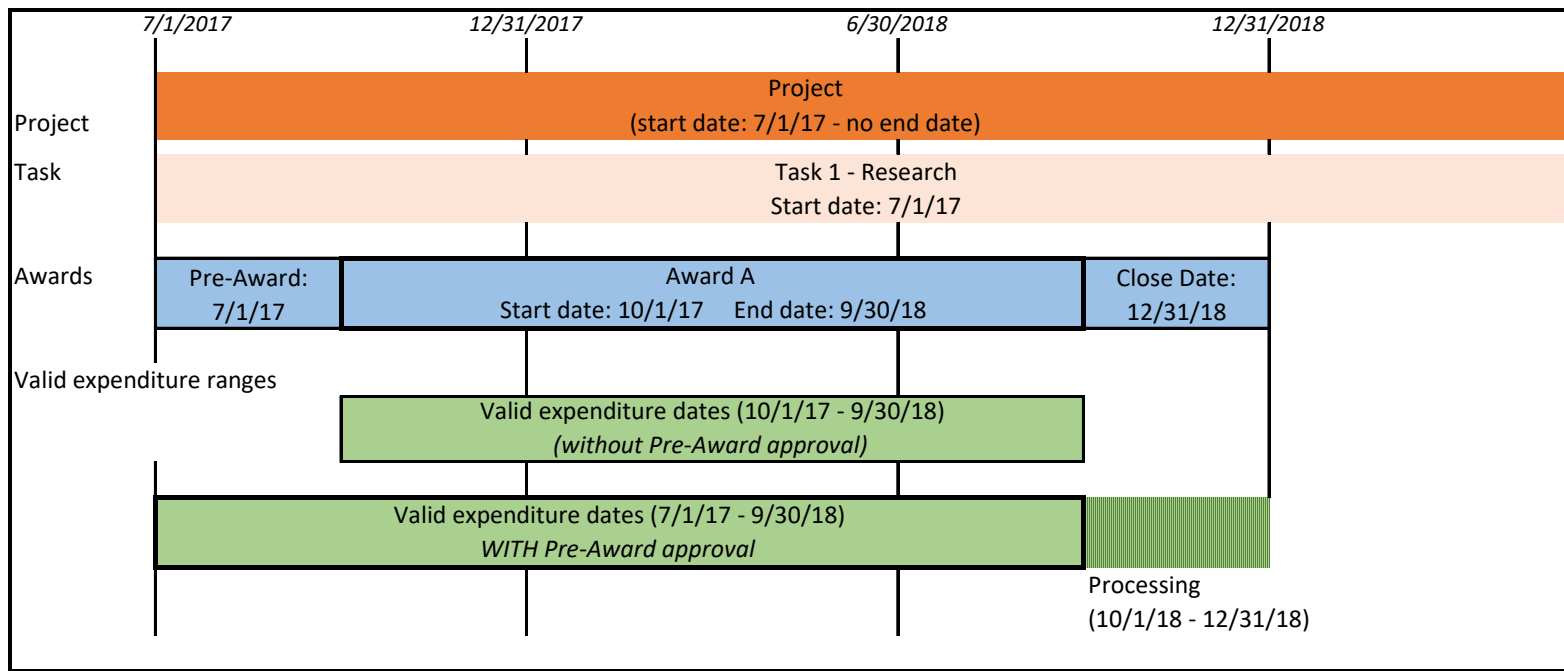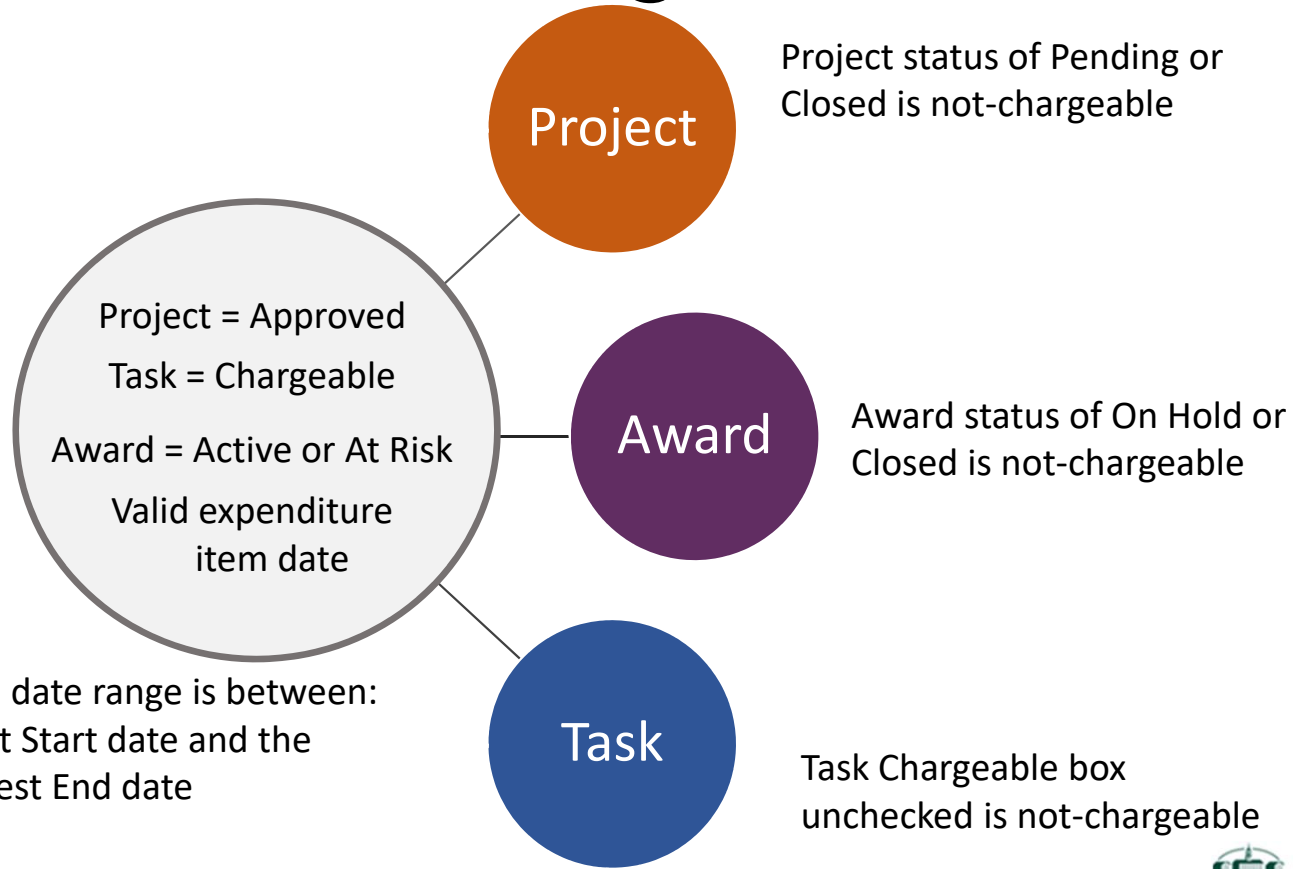
Lesson Summary

- The Project segment represents a person or department with a single task or multiple tasks
- The Task segment provides a way of organizing expenditures
- The Award segment represents the source of funding that supports one or more Projects
- Expenditure Types will roll to an Expenditure Category in the Grants Module
  - Expenditure Category is used for budgeting and for summary reporting in OBI
- Dates on the Project-Task-Award control the expenditure item dates of transactions that can post to the PTA

Project Setup

Oracle User Entry

Login and Navigate Oracle

- Visit: https://www.ohio.edu/finance
- Click Oracle e-Business Suite (e-Biz)

Oracle e-Business Suite (e-Biz)
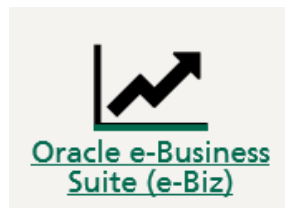
- Enter your **OHIO ID** and **Password**
- Click **OUGMS: Internal Award User**

OUGMS:Internal Award User

Projects

- For project setup, click **Projects**
  - This is the first step to setup a PTA
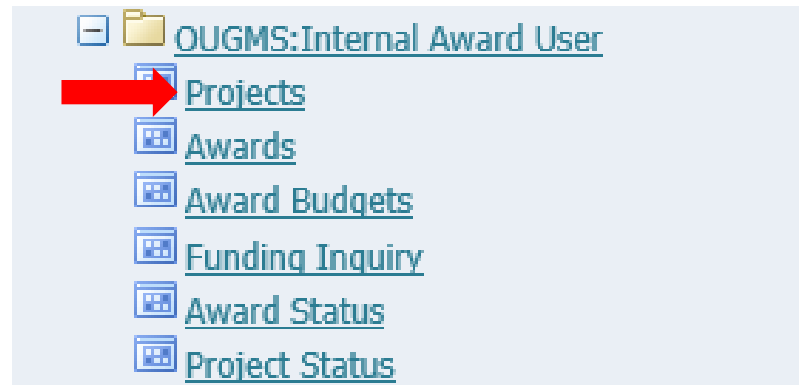
Please use ALL CAPS when entering information into the system

Find Project

- Verify the Project has not already been setup
  - Query the *Name* field; enter either the employee's **Last Name** or Employee ID (6 digits) Number **%#####%**
- Press **Tab** to verify if the employee has a Project
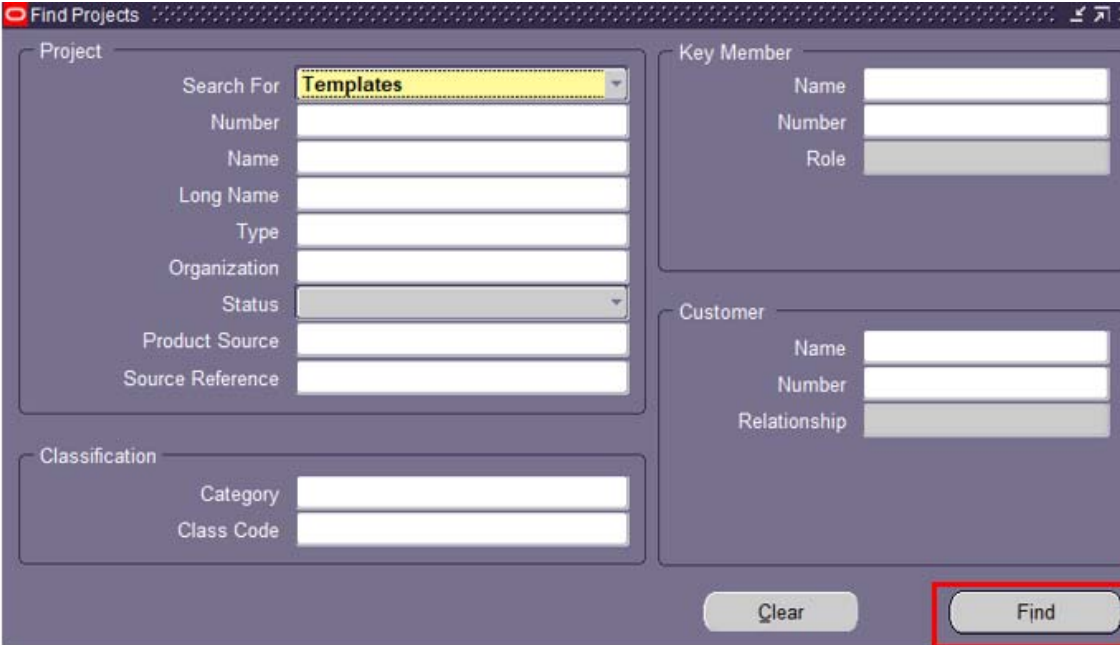
Create a Project

- In *Search For*, click **Templates**
- Click **Find**

Internal Project Template

- To copy the selected template into a new project, click **Copy To**

Project Quick Entry

Project Quick Entry – Required Fields

Field Name	Enter…
Project Name	Unique name limited to 30 characters, alphanumeric, ALL CAPS Faculty Project: LAST NAME, FIRST NAME (EMPLOYEE ID) Department Project: NAME OF DEPARTMENT (ORG #)
Organization	Organization that owns and manages the project
Project Manager	Faculty Project: FACULTY LAST NAME, FIRST NAME Department Project: DIRECTOR LAST NAME, FIRST NAME
Project Start Date	The start date of funding is required in the DD-MON-YEAR format. Click the list of values and select the date.

Project Quick Entry

Field Name	Enter...
Project Administrator	Optional: ADMINISTRATOR LAST NAME, FIRST NAME NOTE: This is for query purposes (Award/Project Member field) in OBI Grants Funds Available and Summary Reports
Administrative Support	Optional: ADMINISTRATOR LAST NAME, FIRST NAME NOTE: This is for query purposes (Award/Project Member field) in OBI Grants Funds Available and Summary Reports
Click **OK**	

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Projects, Templates Summary

- Click the system-generated **Number** and then click **Open**

Reminder: This number is system generated. **You will need the Project Number to fund the Project** (in the Award section)

Projects, Templates

- The Projects, Templates window displays the attributes of the Project Quick Entry

Projects, Templates

Field Name	Enter...
Operating Unit	Default is Ohio University Operations from template
Number	System generated
Name	Default is from the Project Name entered on the Project Quick Entry screen. If necessary, you may update this field.
Type	Default is INTERNAL from template
Organization	Default is from the Organization entered on the Project Quick Entry screen
Long Name	Default is from the Name field. If necessary, you may update this field.

Projects, Templates

Field Name	Enter...
Trans Duration	The project's Start Date and End Date Start Date default is the Start Date entered on Project Quick Entry. If necessary, you may update this field. End Date is left [blank] until the close of the project.
Status	Default is APPROVED
Description	Optional: This can be copied from Name
Public Sector	Leave [blank]; do not check
Workflow in Process	Leave [blank]; do not check
Template	Leave [blank]; do not check
	Click **Save**

Project Closeout

- If a Faculty or Staff member with an internal award Project is no longer with the University, the Planning Unit will need to take the following steps to close out the Project:

  - Review OBI Grants Funds Available dashboard for the Project
    - If there is an Available Balance remaining you should notify the Award Administrator to decrease Budget, create a negative revenue event, decrease funding and decrease installment by the Available Balance amount. (see Appendix G of the Internal Award - How To Guide)
    - If Available Balance is negative you will need to move expenditures off the Internal Award using an Accounting Correction form
    - Once Available Balance is zero for all tasks please notify finance@ohio.edu to close project

Task Setup

Oracle User Entry
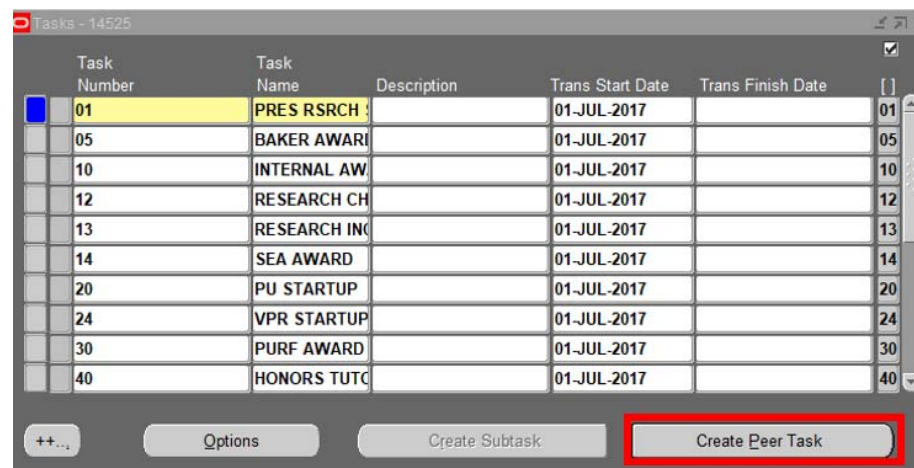
Tasks

- Next to Tasks, click the blue box
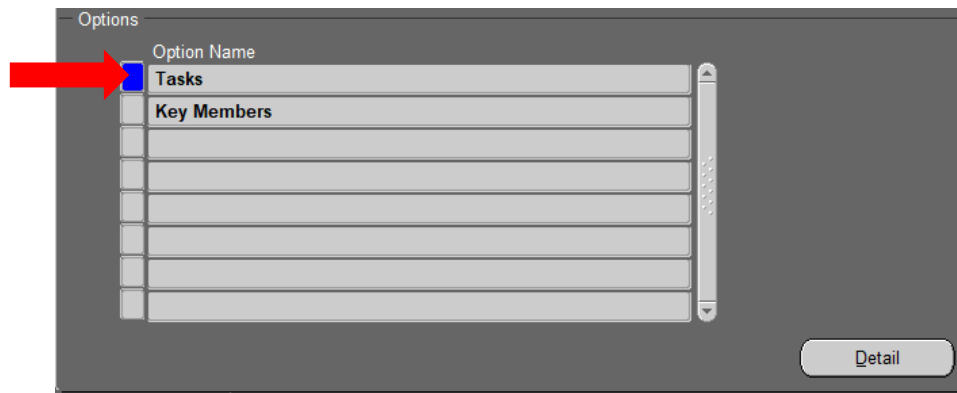
Tasks

- Each Task number must be unique
  - A Task can be up to five digits including a decimal point (.)
  - A Task number <u>cannot</u> be changed after charges post
- When a Project is created, the following Standard Tasks will display in the template. Based on the type of Internal Award, either click a **Task Number** to modify it or click **Create Peer Task** to create a new one

Tasks

Example:

Setup Task 50 by completing the following fields:

	20.01	PU STARTUP 1	PU STARTUP 1	01-JUL-2017		20
	24	VPR STARTUP		01-JUL-2017		24
	30	PURF AWARD		01-JUL-2017		30
	40	HONORS TUTO		01-JUL-2017		40
	50	TRAVEL AWAF	TRAVEL AWARD	01-JUL-2017	30-JUN-2020	50
	60	GSS TRAV RE!		01-JUL-2017		60

++...   Options   Create Subtask   Create Peer Task

Tasks

- The *Task* window is used to modify or enter the attributes of a Task

Column Heading	Definition
Task Number	Task number convention
Task Name	A short description of the Task's funding source Limited to 20 characters, alphanumeric, ALL CAPS
Description	A long description of the Task Limited to 240 characters, alphanumeric
Trans Start Date	Defaults from Projects Trans Duration Start Date. If necessary, this date can be changed.
Trans Finish Date	Defaults from Projects Trans Duration End Date. This is [blank], but can be end dated.

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Tasks

Column Heading	Definition
OU Parent Task (Defined Flex Field = DFF)	This holds the corresponding parent task value. It allows the user to replicate the task-rollup functionality for reporting purposes. For example, 20 is entered in the OU Parent Task Number when you enter 20, 20.01, 20.02, etc. This is a **required** field for reporting consistency. The following OU Parent Tasks will default from the template: If a new task is added, this field is required. The following is an example:
	Click **Save** 📒

Task Options

- Click **Options**
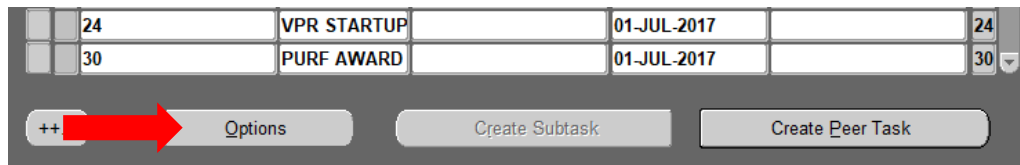
- Next to *Task Detail*, click the blue box
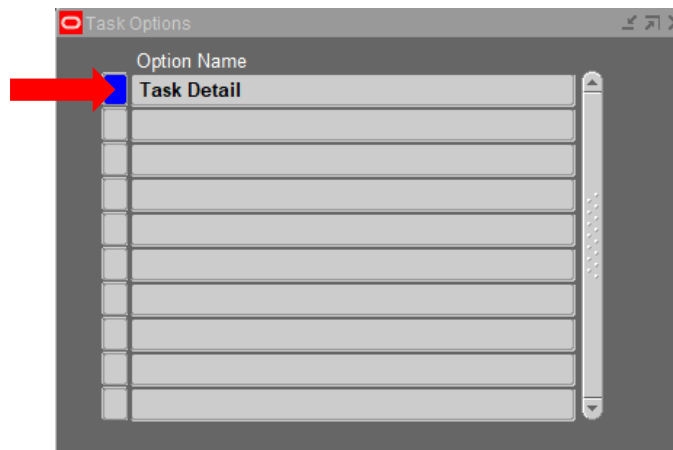
Task Details

Task Details

Field Name	Enter…
Task Number	Default is from the Task Window. This can be changed if no funding, budget or transactions have posted to this Task.
Task Name	Default is from the Task Window. Limited to 20 characters, alphanumeric, ALL CAPS. If necessary, this can be changed.
Long Task Name	Default is Task Name. Limited to 240 characters. If necessary, this can be changed.
Task Manager	Leave [blank]
Organization	The Task owning organization. Default is from the Project. If necessary, this can be changed. This auto accounts to the Organization segment in the General Ledger.
Service Type	Default is NOT SPECIFIED. This auto accounts to the Activity segment in the General Ledger. **NOTE:** Contact Finance@ohio.edu to add already existing Activity Segments to the Grants Module so they can be used as a Service Type.

Task Details

Field Name	Enter…
Trans Duration	The Start Date and End Date for the Task. Default Start Date is the Start Date entered on the Project. End date is optional. This can be changed within the time frame of the Project and Award.
Description	Optional; if necessary, this can be changed.
Allow Charges	Checkbox; when checked it signifies that expenses may be charged to the Task. **DO NOT UNCHECK**.
Billable	Checkbox; when checked it signifies that expenses charged to the Task are eligible for generating the transfer journal entry in the General Ledger. **DO NOT UNCHECK**.
Click **Save**. Close the windows.	

Key Members

Oracle User Entry

Key Members

- Next to *Key Members*, click the blue box

Key Members

- The **Project Manager** role is required
  - The Project Manager is entered during Project setup
- These roles are optional
  - Administrative Support
  - Project Administrator

Key Members

Field Name	Enter…
Employee Name	EMPLOYEE LAST NAME, FIRST NAME
Number	Employee number will auto-populate and should be verified if there are multiple employees with similar names.
Role	The Project Manager role is required.
From	The default is the Start Date of the Project.
To	End Date only if the Project Manager is replaced with a different person.
Click **Save.** Close the windows.	

Award Setup

Oracle User Entry

Add an Award

- Click **Awards**, then click **Open**
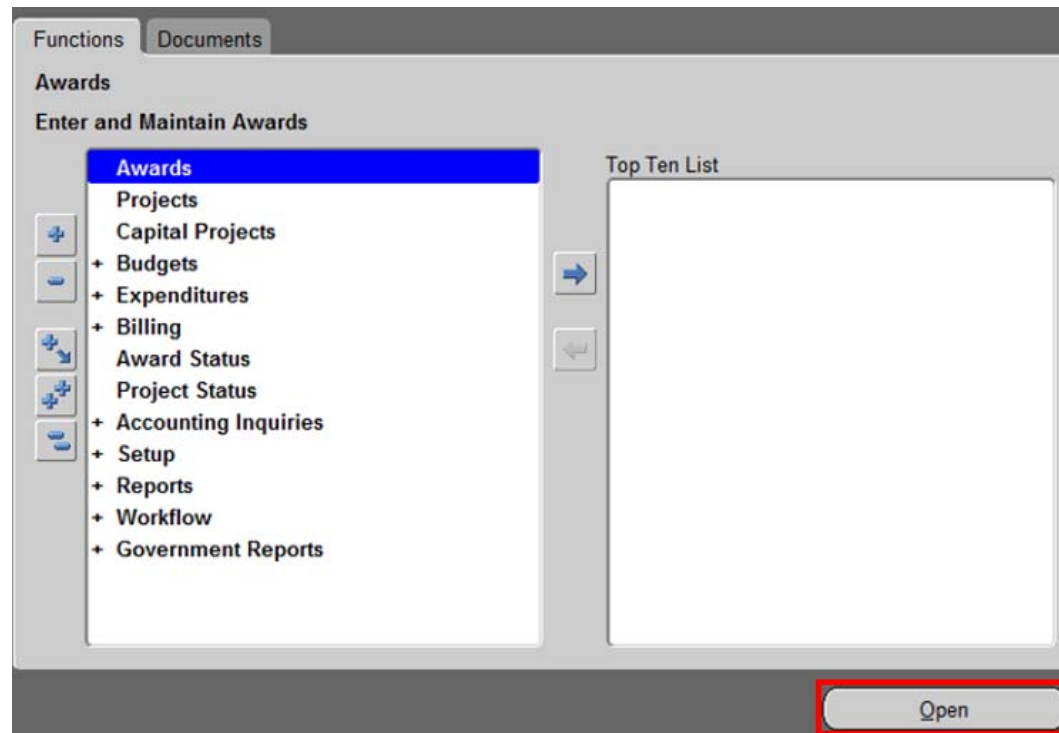
Add an Award

- In the *Search For* field, click **Templates**
- Click **Find**

Award Quick Entry

Award Quick Entry

Field Name	Enter…
Award Number	A seven digit smart number determined prior to setup of the award: 1st digit = 4 for Internal Award 2nd and 3rd digits = Planning Unit # 4th – 7th digits = number sequence assigned by Planning Unit
Award Short Name	Limited to 30 characters, alphanumeric Example: PLANNING UNIT STARTUP FUNDS

Award Quick Entry

Field Name	Enter…
Full Name	Limited to 240 characters, alphanumeric It can be the same as the Award Short Name
Start Date	Start Date of funding. Format: DD-MON-YEAR or click the list of values ▫ and select the date.
End Date	End Date of funding. Format: DD-MON-YEAR or click the list of values ▫ and select the date.
Close Date	End Date; expenditures cannot be charged to an award after this date. Format: DD-MON-YEAR or click the list of values and select the date.
Award Type	Type of funding selected from the list of values Example: PU STARTUP FUNDS
Purpose	Select from the list of values: University Research, Instruction, Public Service, Student Services, Academic Support, or Fundraising & Development

Award Quick Entry

Field Name	Enter...
Organization	The organization to which the award is assigned
Status	Default is "ACTIVE" which allows expenditures to post to the award and the transfer journal entry to process in the General Ledger "CLOSED" prevents expenditures from posting to the award.
Award Manager	Department staff who provides administrative and financial management of the award. Enter LAST NAME, FIRST NAME.

Award Quick Entry

Field Name	Enter...
Awards Descriptive Flexfield	The account number that will fund the award. A debit will be processed to this account when completing the Events process on the *Compliances* tab. NOTE: The account entered in the Award Descriptive Flexfield must be valid with the Award Type on the Award.
	Click **OK**
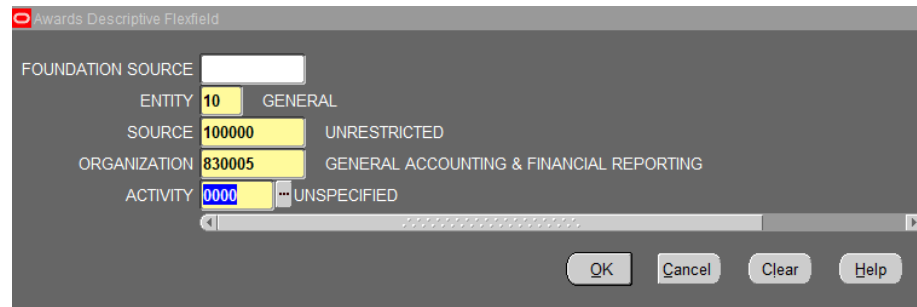
Awards Descriptive Flexfield

- A University account funding a University Award Type
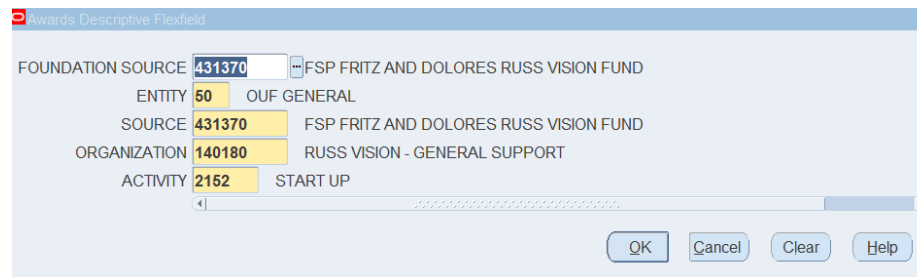
- A Foundation account funding a Foundation Award Type
  - The *Foundation Source* must equal the *Source* in the account string and correspond with the Award Type

Award Management

- Both will default to checked – Do not change
  - Revenue Hard Limit
  - Invoice Hard Limit

Award Installments

- An installment defines the dollar amount that will fund the Project and Task

- Click the **Installments** tab
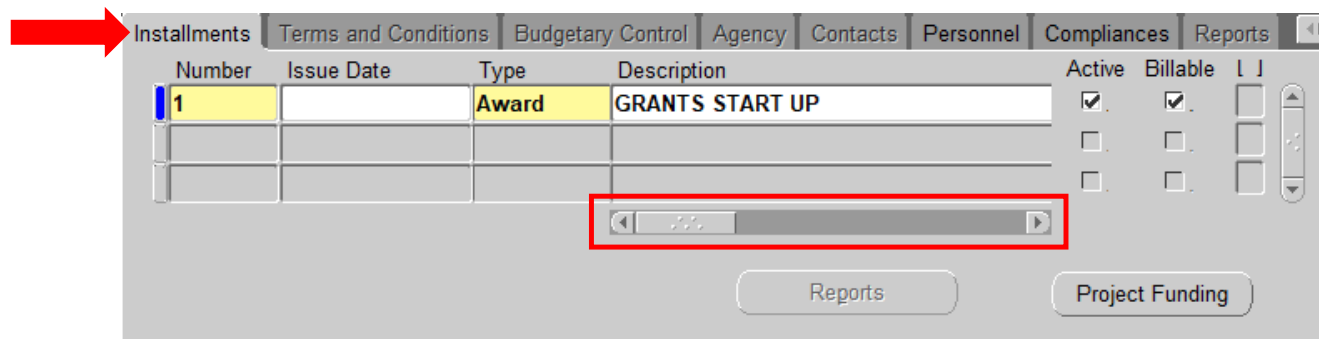
- Use the **scroll bar** to view all of the fields

Award Installments

Field Name	Enter…
Number	The naming convention for installment number is sequential order
Issue Date	Effective date of award/modification. This can be [blank]
Type	One of the following: • Award is the original funding • Supplement is additional funding • New Installment Number is recommended • Amendment is a non financial change with no amount to enter (used for extensions, budget revisions)
Description	A short description for the purpose of the installment: Examples: FALL SEMESTER AWARD or FISCAL YEAR AWARD

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Award Installments

Field Name	Enter...
Start Date	The Start Date of the award
End Date	The End Date of the award; the date the installment is no longer active.
Close Date	Same as End Date
Direct Cost	The full funding amount. **DO NOT USE COMMAS WHEN ENTERING DOLLARS.**
Indirect Cost	Leave [blank]
Total Cost	Default is the Direct Cost
Active	If Active is checked, expenses can be charged to the award. The Award Amount field and the Funded Amount field will be populated. If this is not checked, the installment amount will be populated in the Award Amount field, but not in the Funded Amount field.
Billable	Billable will be automatically checked once the *Active* box is checked. This is required in order for the transfer journal entry to be generated.
Click **Save** 📝	

Project Funding
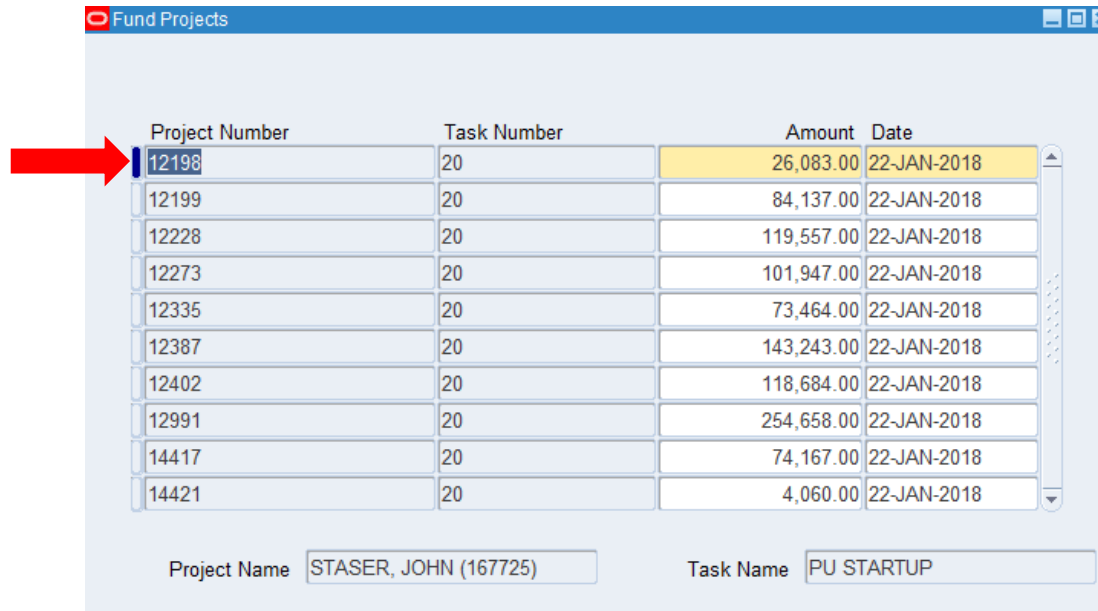
- Project Funding is an allocation of funding from an Award to a Project and Task

- In Installments, when the *Active* checkbox is checked, the Project Funding button becomes active

- Click **Project Funding**

Project Funding

- To add funding, enter the Project Number or click the blue box next to the appropriate Project Number

Project Funding

Field Name	Enter…
Project Number	Enter or select the Project Number to fund.
Task Number	Enter or select the Task Number to fund.
Amount	Enter the funding amount.
Date	Default is the current date (informational only)
Click **Save**. 📒 Close the window.	
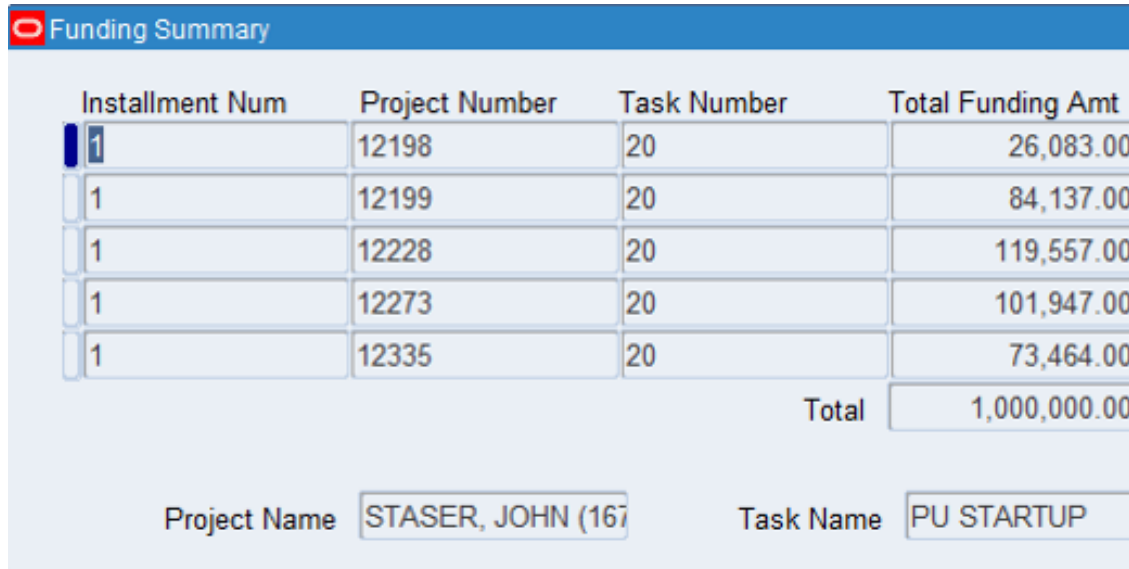
Funding Summary

- To verify the Project Funding totals are correct, click **Funding Summary**

Funding Summary

- The Funding Summary displays the *Total Funding Amount* for each Project Number and Task Number
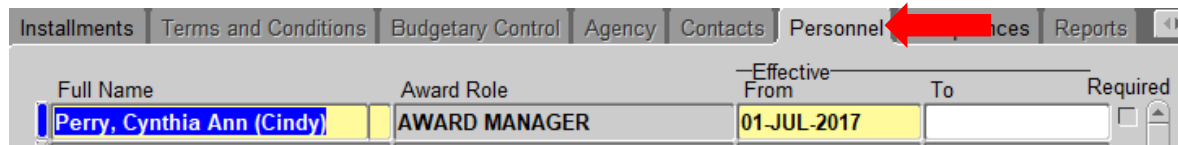
Personnel

- Click the **Personnel** tab
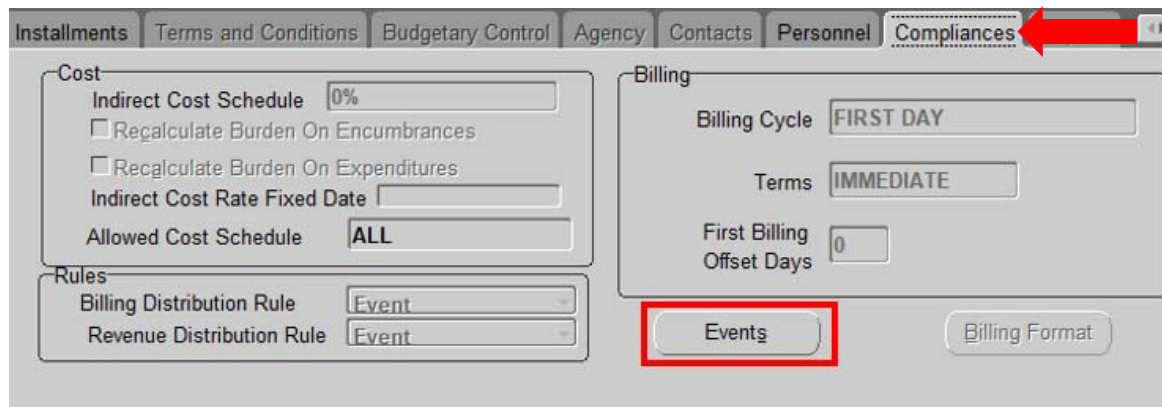
- The Award Manager is a required filed. The Award Manager role will default from the *Award Quick Entry* window
- If the Award Manager changes during the life of the Award, **DO NOT DELETE THE NAME**
  - End date the personnel
  - Add a new line with the new personnel (Last Name, First Name) and Start Date
    - The dates <u>cannot</u> overlap, so enter the next day
  - Click **Save**

Compliances

- Click the **Compliances** tab

- Click **Events**
- The following process initiates the funding transfer JE

Event

Event

Field Name	Enter…
Num	Enter the event Num. Event Numbers should be entered in sequential order. **WARNING:** If you don't click Save after each line, the Event Number will not change and has to be changed manually.
Date	The date of the Event is the Start Date of the Award. You may schedule an Event for a future date. **NOTE:** It will not generate the transfer until the future date specified.
Installment Number	The installment number for event to complete the transfer of funding
Project Number	The Project Number funded by this transfer
Task Number	The Task Number funded by this transfer
Amount tab	Click the *Amount* tab and enter the Funding Amount for the transfer of funding
Description tab	Click the *Description* tab and enter a Description for the event Example: PLANNING UNIT START UP
	Click **Save**.

Budgeting Awards

Oracle User Entry

Award Budgets

- An Award Budget is a detailed estimate of the cost of a project funded by a particular award
- At the top of the *Award Management* window, from the **Tools** menu, click **Award Budgets**

Award Budgets

- In the list, click the **Project Number**

Award Budgets

Field Name	Enter…
Version Name	Leave [blank]
Change Reason	• Original Cost Budget – initial funding for the project • New Increment – increment received after the original cost budget • Budget Amount Revision – only for budget revision when no funding is received
Description	Leave [blank]
Click **Details**.	

Award Budgets

Task Budgets

- If there are multiple Tasks, click the blue box next to the appropriate Task to open the Budget Lines

Budget Lines

Budget Lines (cont.)

Field Name	Enter…
Resource	Enter Expenditure Category
Amount Type	Defaults to Burdened Cost
Month in Oracle FMS	Enter the budget on the 1st available month
Click **Save** 💾	

- When you have finished budgeting, click **Save** and close the windows
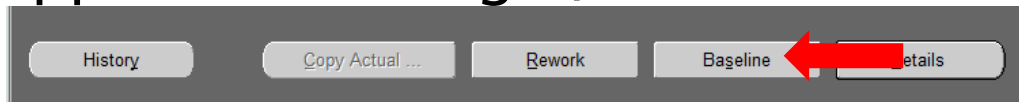
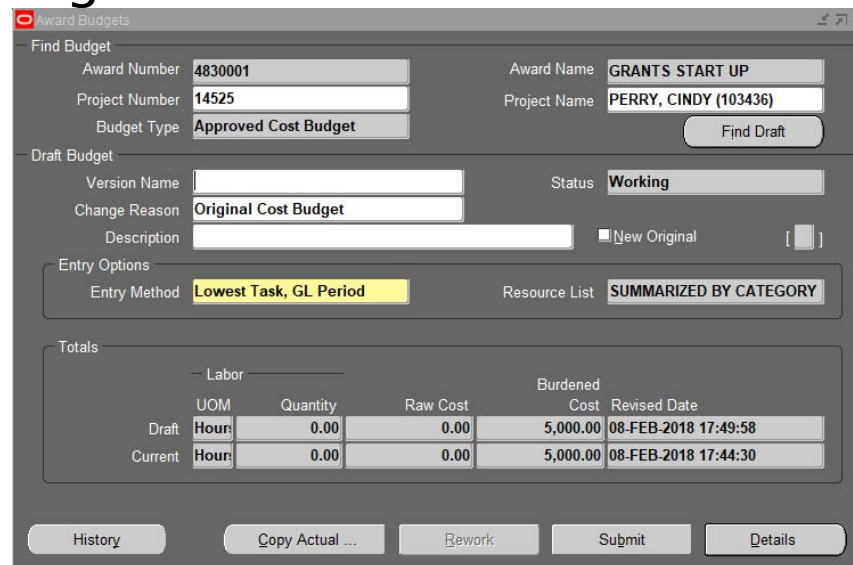# Submit

- To submit the budget, click **Submit**

- Following submission, the *Status* field will display "Submitted"

Baseline

- To approve the budget, click **Baseline**

- The *Status* field will display "Working"
  - You may need to click **Find Draft** button to display the updated current budget

Repeat the Steps as Needed

- If you have additional Projects, select the next **Project Number** and repeat the steps
  - Repeat for as many Projects as necessary
- The Event to transfer funding will occur automatically each evening
- The following slides show examples of auto accounting, so you can see how the Journal Entry (JE) will be generated
- It is suggested that you check the OBI Grants Funds Available dashboard the day after these processes to make sure all steps were done correctly and to verify Funding=Budget=Revenue for the Award

Auto Accounting: University Account

Grants Module

12143 — **Project**

50 — **Task** (Org | Service Type)

4800003 — **Award** (Award Type | Purpose)

Expenditure Type

General Accounting & Fin Reptng

Not Specified

Departmental Award (112600)

University Research

712410 Laboratory Supplies

10	112600	830005	0000	20	712410
Entity ENT (2)	**Source** SOURCE (6)	**Org** ORG (6)	**Activity** ACTV (4)	**Function** FNC (2)	**Object** OBJ (6)

General Ledger
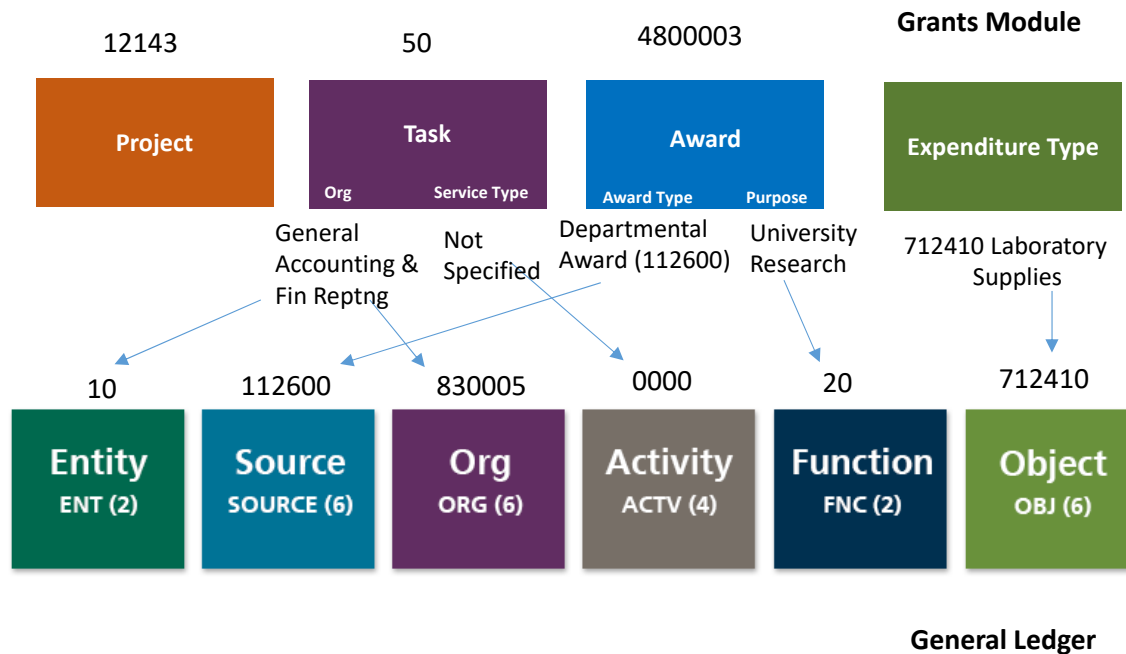
Auto Accounting: Foundation Account
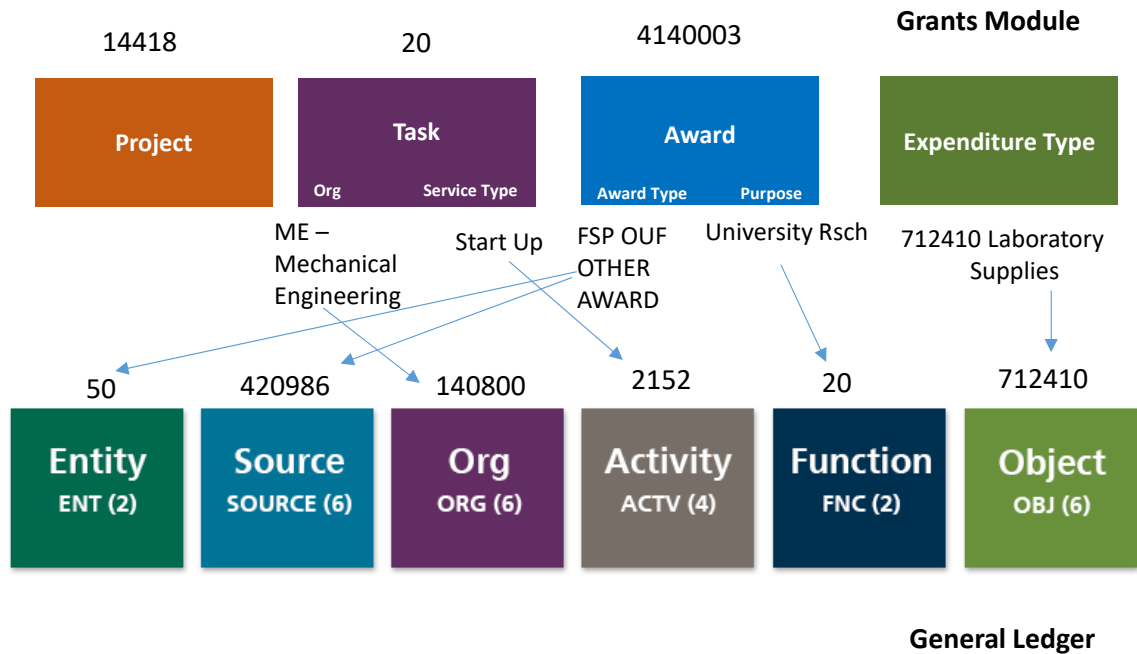
Award Closeout

- If an Award has reached its end date the Award Manager will need to take the following steps to close out the Award:

  - Review OBI Grants Funds Available dashboard for the Award
    - If there is an Available Balance remaining the Award Manager should decrease Budget, create a negative revenue event, decrease funding and decrease installment by the Available Balance amount. (see Appendix G of the Internal Award - How To Guide)
    - If Available Balance is negative the Award Manager should notify the Planning Unit to move expenditures off the Internal Award using an Accounting Correction form
    - Once Available Balance is zero for all Project-tasks, please notify finance@ohio.edu to close the Award

Questions?

Finance Customer Care Center

740-597-6446

financecustomercare@ohio.edu

Thank You!