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## Request to Override Budget and Unfreeze a Project

Please submit completed form to [PSGRANTS@emory.edu](mailto:PSGRANTS@emory.edu) with Department name in the subject line

### Request is subject to OGCA approval

Additional information and/or a copy of the supporting documentation may be requested prior to approval. If approved, the PS project will be opened for 30 days. During this 30 day period any expense can hit the PS project. The Requesting Department is responsible for any expenses that post to the PS project as a result of this request.

[Use one form per PS Project and per occurrence]

Requestor Name \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Authorized Signature \_\_\_\_\_

Date \_\_\_\_\_ Name & Title \_\_\_\_\_

**PI Name:**

**Award Begin Date:**

**Award End Date:**

### Complete the Chartfield Information Below:

Business Unit                    \_\_\_\_\_

Operating Unit                 \_\_\_\_\_

Fund Code                        \_\_\_\_\_

Project                            \_\_\_\_\_

Department ID                 \_\_\_\_\_

SmartKey                         \_\_\_\_\_

**Justification:** (please note if you would like PS project opened for less than 30 days)

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**Where the charges will move to?**

**Charges are older than 90 days**

Federal or Non-Federal sponsored project

Yes

Departmental or Discretionary project

No

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**If charges are older than 90 days and will move to a sponsored project:** Associate Vice President for Research Administration signature is required.

Associate Vice President Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### Type of transaction needed:

Journal Entry      Journal Entry ID: \_\_\_\_\_

Retroactive Salary Transfer (RST)

Accounts Payable

Other      Please explain: \_\_\_\_\_

OGCA Associate Director Signature: \_\_\_\_\_

Date: \_\_\_\_\_

*Budget will be overridden or Award will be opened for 30 days from the OGCA approval date.  
Requestor will be notified of approval or otherwise by email.*

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## Request to Override Budget and Unfreeze a Project

### REQUEST TO UNFREEZE CLOSED AWARDS – Instructions

PeopleSoft is a date driven system and will only allow costs to hit within the appropriate charge periods. Departments and PI's are responsible to ensure that all charges and costs are appropriately recorded on the PS project by 60 days following the PS project end date to allow for timely reporting\*. In some infrequent instances with appropriate justification, it may be allowable to open the PS project to allow appropriate costs to be charged to a PS project outside of the regular period. To request this access, this form should be completed and forward to OGCA for approval.

**Please note the following rules which apply to PeopleSoft Projects\*:**

**OPEN stage** includes the dates within the PS project period where allowable charge.

**ENDED stage** includes the 59 days following the last day of the PS project. During this period, invoices against a previously issued PO, cost transfers, journal vouchers and RST's can still be processed. Invoices *without a purchase order* cannot be paid during this period.

**CLOSED stage** begins at 60 days following the last day of the PS project. During the period of 60-89 days following the last day of the PS project, OGCA can process/approve journal vouchers to prepare the account for reporting and make any final necessary adjustments. **The PeopleSoft System will not allow charges of any type at 90 days or later following the end date\*.**

**UNFREEZE stage** is a period of time where the **CLOSED stage** has been overridden by OGCA to allow appropriate charges to occur.

**Please use this form to unfreeze a PS project for the purpose of:**

- To pay an invoice received after the PS project end date and no purchase requisition was created prior to PeopleSoft.
- To submit cost transfers/journal vouchers/RSTs following 60 days after the PS project end date.

**All entries/costs must have been incurred prior to the end date and must be appropriate to be charged to the PS project.**

**\*Requests to allow charges 90 days or more past the end date must be submitted to the Associate Vice President for Research Administration and will be approved in very rare circumstances only. (These entries require permanent system extension of the PS project end date.)**

*\*Please note that the days provided above are for a typical PS project with a 90 day reporting requirement. PS Projects with a shorter reporting requirement require costs to be finalized in less time to meet final invoicing and reporting requirements. Please see your project documents or contact OGCA for further guidance.*