REQUEST TO INACTIVATE PROJECT/GRANT (PG)  (Non-Research Only)

Financial Services Department

Date

I. Send request to Finance.

Attention: Staff in-charge of the PG: Tanya Stein

II. PG to be inactivated

III. Action Required to Inactivate the PG

Eliminate the remaining PG balance by (please check one):

☐ Prepare a requisition for payment to refund the unspent balance to the Contractor/Grantor. Attach it to this request and submit to the attention of the Clerk In-Charge at Finance.

OR

☐ Prepare a journal voucher identifying the expenses to be transferred and submit it with this request to the attention of the Clerk In-Charge at -Finance. On-line users should indicate the Journal ID number processed.

Specific instructions regarding the above:

Note: The responsible person must stop, delete, or transfer to an alternate PG all outstanding commitments and automatic charges such as:

Telephone Contact IT Services.
Payroll Submit an appointment form for change of account to Payroll Section of Finance.
Computing Services Contact Computer Centre’s Accounts Office.
Outstanding Travel Advance Complete the travel advance claim/clearance form and send to Requisition Processing Section of Finance.
Purchase Orders Contact Accounts Payable (AccountsPayableHelp@finance.ubc.ca) to decommit Purchase Order (PO) commitments no longer anticipated for delivery. Note that if POs are valid, then the commitment cannot be moved (due to system limitations) and the PG cannot be inactivated until the order is fulfilled and paid.

EBOS/P-Card Contact Supply Management

Provide an alternate PG number to which transactions can be applied after the PG has been inactivated.

The alternate PG is:

The Manager’s name is:

Contact Person for queries (PLEASE PRINT) Tel:

IV. Authorizations

I authorize Finance to inactivate the PG.

__________________________  ____________________________
Signature of Manager for PG to be inactivated Signature of Manager for alternate PG (if different)

Print Name Print Name