CPCA   Project Manager

1) ## Confer and agree with institution that project is complete
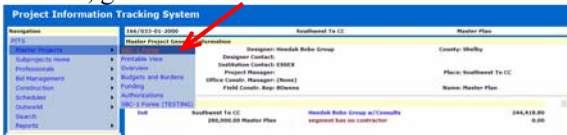
2) In PITS, ↙ ↓ Go to Master project Overview

Select link to "Enter Archive Dates" ↑
and enter your date ↓
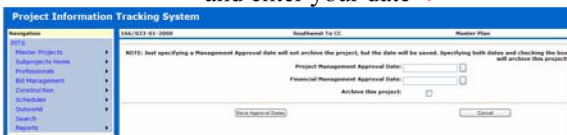
3) In PITS, get a Master "Printable View" tracking sheet

4) In PITS, go to Master SBC-1 forms

and get a Master SBC-1 form "Printable View"

5) Fill out P.0961 with initials, date, and SBC# ↓

and send P.0961, tracking sheet, and SBC-1 to Business Office

CP Budget Cordinator

6) Reconcile PITS and STARS
7) Print STARS project file report
8) Note funds to liquidate on P0961
9) Enter PITS archiving approval date (like step #2)
10) Initial and date P0961 and route
11) Create SBC-1 form showing final accounting
12) Upgrade SBC-1 form to Submitting
13) Note SBC-1 allocation changes on P0961
14) Initial and date P0961 and route

AVP CP

15) Review closure nomination
16) Upgrade PITS SBC-1 form to Pending
17) Initial and date P0961 and route

CP Budget Cordinator

21) Enter PITS funding liquidations
22) Upgrade PITS SBC-1 to Approved Current
23) Invoke PITS project archiving function
24) Initial and date P0961 and route
25a1) Receive P0961 and backup
25a2) Add P0961 and backup to hardcopy file
25a3) Transfer hardcopy file to archive box
25a4) ↙ ↓ Go to Master project Overview
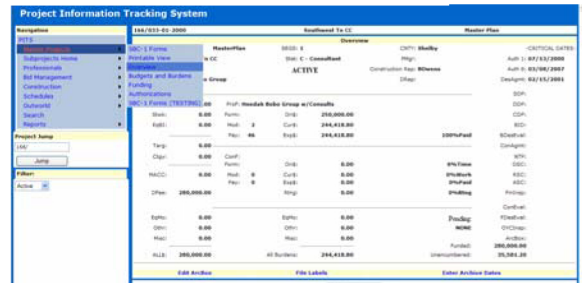
Select link to ↗ "Edit ArcBox"
and enter date-formatted box number ↙

⇨ **Office of Business and Finance**
25b1) Receive copy of P0961 and backup
25b2) Close accounts
⇨ **CPCA Project Manager**
25c1) Receive copy of P0961 and backup