

IMPAC Data (old records/WIPs) Clean-up

Many times type 3s (supplements) are created and never awarded; Fellows are awarded and never activated or early term (and an early termination is not properly performed); WIPs are created and never acted upon. Having these records floating around out there can cause problems when trying to do reporting. Also, program officials may have erroneous data in their portfolio if they are using the Program Module (PGM) and old records exist. The following will show how to clean up some of this old data.

Open the Grants Management Module (GM)

Open the 'Cool Tools' web page <http://impac2.nih.gov/tools/>

Start with the "old WIP search"

Select your IC; then hit the 'Run List' button

You'll get a list of results

IMPAC II: Old WIP Search Results

Work-In-Progress (WIP) records created in IMPAC II GM Module that have never been released.
 IC= NS
 Report Created: July 13, 2004 4:46 PM
 Query Returned: 541 records

Appl ID	Grant Number	PI	FY	Created By	Created Date	PCC	Latest DFM
6499413	5 R01 NS 37436 - 3	WROBLEWSKI	2002	WASHINGTONJ	06-FEB-04	NUNNM NE	29-JAN-02
6529491	5 R21 NS 40297 - 3	PALMER	2002	SHIELDSK	13-FEB-04	TAGLEDNG	28-AUG-02
6765669	1 R01 NS 48396 - 1	GUO	2004	SIMMONSSS	17-FEB-04	MURPHDND	11-FEB-04
6529139	7 F32 NS 11170 - 3	HAENDEL	2002	KINCHENA	18-FEB-04	LEBLAGNG	25-SEP-02
6625890	5 R21 NS 43776 - 2	YAGI	2003	CAMPBELLK	18-FEB-04	MURPHDND	29-SEP-03
6687717	5 R01 NS 41249 - 3	LANE	2004	WASHINGTONJ	23-FEB-04	UTZU NE	25-NOV-03
6654417	5 R01 NS 36526 - 8	TEUSCHER	2003	WASHINGTONJ	23-FEB-04	UTZU NE	10-JUN-03
6539826	5 R01 NS 34153 - 7	VAN DE KAR	2002	CAMPBELLK	26-FEB-04	MITLEMCN	11-NOV-03
6659082	5 U10 NS 44485 - 2	ADLER	2003	SISCOR	27-FEB-04	RAVINBCT	28-AUG-03
6776086	1 R01 NS 41674 - 1 A1	CHARLTON	2004	MAYERP	27-FEB-04	MURPHDND	
6739622	5 U13 NS 43308 - 3	SORKIN	2004	SHIELDSK	01-MAR-04	PORTELCN	12-FEB-04
6720924	1 K02 NS 45798 - 1 A1	DAUER	2004	CAMPBELLK	02-MAR-04	SHEEHPND	
6793866	1 R43 NS 48786 - 1	LAWRENCE	2004	CAMPBELLK	03-MAR-04	SHEEHPND	
6741946	5 K24 NS 2165 - 5	GOLDSTEIN	2004	BOHLERG	08-MAR-04	MARLEJCT	
6789626	1 R43 NS 48731 - 1	OLSON	2004	WASHINGTONJ	09-MAR-04	UTZU NE	

As a rule of thumb, anything older than three months (see the 'Created Date') should probably be deleted.

From here, print the list out so you can use it in GM to delete old records. This list was run on July 13th. So, any WIPs created prior to April 13th will be deleted.

Go to GM

1. Select 'Clear'
2. Enter the serial number
3. Select 'Run Query'
4. Highlight the WIP to be deleted/discarded
5. Select 'Discard WIP'
6. Repeat steps 2 – 5 until all of the old WIPs are deleted/discarded

IMPAC-II - GM - [Search]

File Edit Grant Report Custom action Links Window Help

Assign ICSTORE Admin Award Release

QUERY PARAMETERS

Grant # (LOV) ICD NS 40297 Subproject ID FY Appl. Status Group Appl ID

PI Name (L, F MI) Primary PCC RFA PA #

Institution Percentile Council Date

Institution City State Priority Score Budget Start

Current Assignment (L, F MI) Select Current Assignment

HIT LIST

WIP	Exist?	ESNAP?	Grant #	Subproj ID	PI Name (L, F MI)	GS Assignment	Budget Start Dt	SITS
<input type="checkbox"/>	<input type="checkbox"/>	3	R21 NS 40297	3 S1	PALMER, DAVID N	Simmons, Sheila	09/01/2002	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	R21 NS 40297	3	PALMER, DAVID N	Simmons, Sheila	09/01/2002	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	5	R21 NS 40297	2	PALMER, DAVID N	Shields, Karen	09/01/2001	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	3	R21 NS 40297	1 S1	PALMER, DAVID N	Carlisle, Tina	09/08/2000	<input type="checkbox"/>

Next select "Unawarded Administrative Supplement Search"

Select your IC; then hit the 'Run List' button

You'll get a list of results

IMPAC II: Unawarded Administrative Supplement Search Results

Admin Supplements created in IMPAC II GM Module not released.

IC= NS
July 13, 2004 9:59 PM

Appl ID	Grant Number	PI	FY	Created By	Created Date	PCC	WIP
6896275	3 P50 NS 39788 - 5 W2	WOOTEN	2004	SIMMONSSS	18-MAY-04	MURPHDND	Y
6902708	3 R37 NS 37060 - 7 W1	Filbin	2004	KIBLERBR	06-JUN-04	KLEITNRP	Y
6906237	3 R01 NS 36081 - 7 W1	Milligan	2004	CAMPBELLK	10-JUN-04	SHEEHPND	Y
6908798	3 R01 NS 43396 - 3 W1	MERINEY	2004	BOHLERG	15-JUN-04	LIUY SC	Y
6912122	3 R01 NS 40960 - 3 W1	KARTJE	2004	CARLISLET	21-JUN-04	JACOBTNE	Y
6914696	3 R01 NS 38384 - 5 W1	HOBSON	2004	BOHLERG	24-JUN-04	RADZIBCT	Y
6916786	3 P01 NS 28121 - 13 W1	ZIVIN	2004	CARLISLET	29-JUN-04	JACOBTNE	Y
6917478	3 R37 NS 25074 - 16 W1	DONOGHUE	2004	WALKERK	30-JUN-04	CHEND SC	Y
6920308	3 R01 NS 41584 - 4 W1	Lorson	2004	KIBLERBR	07-JUL-04	GWINKKNG	Y
6922313	3 R01 NS 45485 - 2 W1	WINSTEIN	2004	WALKERK	12-JUL-04	CHEND SC	Y
6923521	3 R01 NS 45935 - 2 W1	BREHM	2004	BOHLERG	13-JUL-04	LIUY SC	Y
6923531	3 P01 NS 44306 - 2 W1	KENNFY	2004	BOHLERG	13-JUL-04	LIUY SC	Y

As a rule of thumb, anything older than three months (see the 'Created Date') should probably be deleted.

From here, print the list out so you can use it in GM to delete old records. This list was run on July 13th. So, any Supplements created prior to April 13th will be deleted.

Go to GM

1. Select 'Clear'
2. Enter the serial number
3. Select 'Run Query'
4. Highlight the WIP to be deleted/discarded
5. Select the red 'X' at the top of the page
6. Repeat steps 2 – 5 until all of the old Supplements are deleted/discarded

Cleaning up old Fellows who terminated early and the procedure was either done incorrectly or prior to the implementation of the early termination feature (and are still listed as “to-be-paid”):

1. In the Activity Code box type “F%” (this will return all F series grants)
2. In the “ICD” box type your IC’s call letters
3. In the “Appl Status Group” drop down menu select ‘To be Paid’
4. Select a FY (Repeat this for additional years)
5. Run Query

In most cases if you look at the notice of grant award for the previous year – in this case the 01A1 year, NGA dated 2/18/2002, you’d find the following footnote

This Fellowship Award is revised to terminate award as of 12/30/01 per Fellow's request of 12/15/01.

This record just wasn’t early termed, so the future year still exists and is listed as “To be paid”

For older FY, the IC may elect to unselect the e-mail feature on the release screen and early term the grant internally (without sending a copy to the grantee --- in the footnotes make an “internal copies only” comment.) The following are instructions on early terming a grant. A copy of the single page early term instructions can be found at

http://odoerdb2.od.nih.gov/gmac/gmac/impacii_instructions/gm_early_termination.doc

Early Terminating a Grant

Previously in IMPAC II GM, when a user changed the project end date, there was no way to determine if the end date was being shortened or if the award was being terminated. To resolve this issue, the GM application now includes the ability to terminate a project early. The Early Terminate Project check box has been added to the Administrative Review Screen with the project and budget start and end dates.

Zeroing out monies and deleting future years is not sufficient to terminate a grant. This will not remove the shell for the future year (if a future year exists.)

1. Open the IMPACII GM Module.
2. Enter the serial/grant number to be terminated.
3. Highlight the appropriate year.
4. Select 'Create WIP'
5. Select 'Admin'

IMPAC-II - GM - [Search]

File Edit Grant Report Custom action Links Window Help

Assign ICSTORE Admin 5 Release

QUERY PARAMETERS

Grant# (LOV) ICD NS 41714 2 Subproject ID FY Primary PCC RFA PA #

PI Name (L, F MI) Percentile Council Date

Institution Priority Score Budget Start

City State

Current Assignment (L, F MI) Select Current Assignment Clear

HIT LIST Run Query Create Record Create WIP 4 Award WIP

WIP Exist?	ESNAP?	Grant #	Subproj ID	PI Name (L, F MI)	GS Assignment	Budget Start Dt	SITS
	5	F32 NS 41714	2	JOHNSON, MARK D	Bond, Jr., King P.	/2002	
	1	F32 NS 41714	1	JOHNSON, MARK D	Washington, James	/2001	

GM1020 Problems? Call the Help Desk (301)402-7469 helpdesk@od.nih.gov 03/12/04 09:37

WIP NEEDED TO PROCESS THE AWARD; SELECT RECORD & CREATE WIP IF NOT ALREADY THERE.

Record: 2/2 <OSC> <DBG>

6. Make sure the budget and project period end dates match.
7. Select the 'Early Terminate Project' box
8. Answer 'Yes'
9. The project/budget period end dates will be grayed out. Finish revising the award per usual (footnotes; worksheet; release, etc.)

IMPAC-II - GM - [Administrative Review]

File Edit Grant Report Custom action Links Window Help

Search Award Release

APPLICATION IPF Code 9087701 Grant Status 03 Award terminated JFF SINGLE-CAN

Grant# 1 F32 NS 041714 1 (L, F MI) JOHNSON, MARK D Appl ID 6340219

Institution UNIVERSITY OF WASHINGTON Inst Type INSTITUTION OF HIGHER EDUCATION RFA/PA

ADMINISTRATIVE REVIEW Early Terminate Project Checklist Items GM Checklist Status Not Started

Project Start 06/01/2001 Project End 12/31/2001 Filed NF NA PM Checklist Status Not Started

Budget Start 06/01/2001 Budget End 12/31/2001

Aids-related Yes No NA Prgm Income

Expedited Review

Council Meeting 200101 Percentile 2.5

EIN 1916001537A1 Priority Score 138

Descrip WASHINGTON UNIV

Carryover Authority Yes No NA HESC used? N

Federal Demonstrations SNAP Award HESC Lines

GS Washington, James

Sign-Off Current Last Issue Date 09/16/2003

Issue Date Activation Processed 09/2003

GM Comments PO Comments ICO Checklist Co-f

Early Award Termination

! A type 5 future year grant exists for this project. Do you want to continue to terminate project?

Yes No 8