



Research Accounting

Date:

From:

To: Research Accounting
(401 Rider Building, fax 814.865.3910, email Res-Acct@psu.edu)

Subject: Extension request

Please change the date(s) for the account listed below. By requesting this change, the department accepts full responsibility for any expenses that may be disallowed because of this change. This document does not replace the need for sponsor approval. If the request is to change the end date, invoicing or drawdowns will cease until the modification is executed and processed by Research Accounting.

Sponsor (If applicable)

Agreement#

Grant & I/O#

Table with 2 columns: Current, Requested. Rows: End Date, Hold Close Date, Budget Date. Includes a footer: See Definitions on next page

Explanation

AUTHORIZING SIGNATURES

Principal Investigator
Department Head
Assoc Dean /Director
College
College
Print Name Signature Date

Pre-Approval Account Extension Request Memo

A department (college, institute, or other unit) will use this form to request an extension of one or more SIMBA dates. This request is required when a department is aware of circumstances that exist that would require the SIMBA account to remain open.

During the time period from the original end date until the formal documentation authorizing the extension is processed by Research Accounting, the status of the award is considered similar to that of an advance fund. Research Accounting will not invoice until the actual modification is processed by Research Accounting.

This will permit departments to continue spending under the discretion of their administration (Department Head, Financial Officer, Research Administrator, etc.) while they are waiting for the necessary paperwork to be finalized

End dates on sponsored projects may be extended no more than 90 days and requests will only be accepted no more than 30 days in advance of the end date as indicated in SIMBA. Only one extension may be granted

If the hold close date is extended, this does not shorten the period between the hold close date and the expense close date. There will still be 45 days for final adjustments and the final invoice to be prepared. The department will be responsible for any disallowances that arise as a result of changing any of the dates.

Definitions

End Date – This date corresponds with the ending date of the period of performance on sponsored projects and should only be changed if there is documentation or certainty of a pending extension. If the account is an MGR or gift account, then this form can be utilized to extend the end date. End dates for these types of accounts will only be moved a maximum of five years.

Hold Close Date – This date is normally established within IBIS as 45 days after the end date. Extending this date will permit all expenses except compensation to continue to post until reaching this date.

Who is authorized to request a change to the dates in IBIS?

Dates on non-sponsored activities (gift or MGR) can be requested by any department designee, typically members of either the Research Administrator's staff or the Financial Officer's staff.

End Dates for Sponsored Activities (Grants and Contracts) can be requested by the Principal Investigator with the approval of the department head and the knowledge of a department designee such as the Research Administrator or Financial Officer.

Note: As indicated above, requests to extend end dates on sponsored activities will only be accepted if there is less than 30 days prior to the end date as indicated in IBIS.

Questions regarding this document should be directed to Office of Research Accounting:

Phone: (814) 865-7525

Fax: (814) 865-3910

Email Res-Acct@psu.edu

Address: Office of Research Accounting
The Pennsylvania State University
227 West Beaver Avenue Suite 401
State College, PA 16801-4819