

## View Grant Attributes

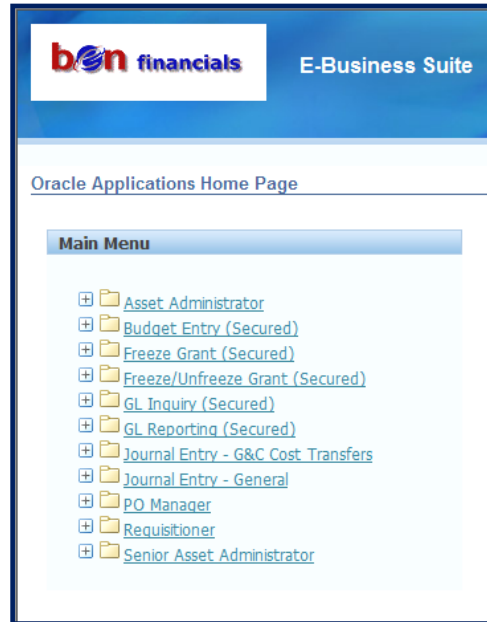
Responsibility: Freeze Grant (Secured),  
Freeze/Unfreeze Grant (Secured),  
GL Inquiry & PO Manager

05/06/13

Brackets ( [ ] ) indicate a button.

## Choosing a Responsibility

- You will only see the Ben Financials responsibilities to which you have access.
- Click on **Freeze Grant (Secured)**. You can select from the options below:



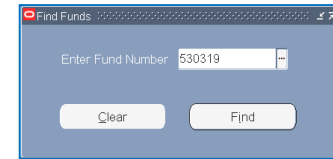
**BEN Helps 6-HELP (215-746-4357)**  
**BEN Knows**

<http://www.finance.upenn.edu/benknows/>

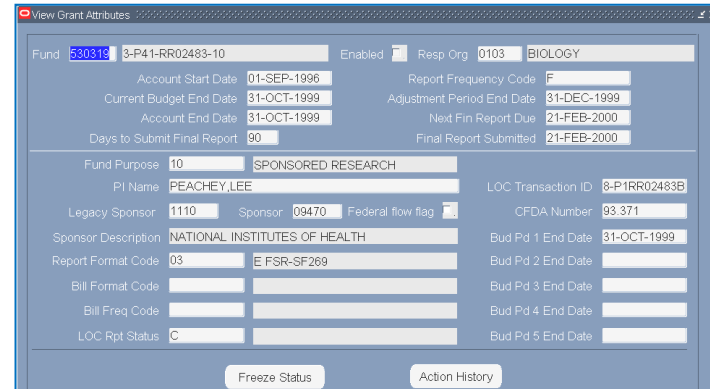
## Fund Info Window

Select the **View Grant Attributes** navigation path. The Fund Info window appears in query mode – you can query on a specific fund at this point.

- Enter a Fund; Click **[Find]**



## Fund Info Window



The information in this reflects information found in COA Inquiry for grant fund attributes and it should match the data found on the Account Information Sheet (AIS).

## Buttons at the Bottom

**Freeze Status**

Click on this button to move to the Freeze Status Window.

- View Freeze Status of all freeze categories

**Action History**

Click on this button to move to the Action History Window.

- View the history of all freeze actions
- Dates of all freeze/unfreeze actions
- User ID of person performing action
- Free-form comments that may be available

## What to Do/Consider Before Freezing?

### Manual On-line Journal Entries

- Are there any existing wayward or unallowable transactions outstanding?
- Are all Purchase Orders 'Finally Closed'?
- Is there a deficit/surplus?
- Do any encumbrances have to be removed manually?

### C-Forms

- Has Accounts Payable processed all outstanding forms?
- Are all non-PO sub-contracts paid for?

### New Requisitions & POs

- Did you notify all PO Managers/Requisitioners who use the grant?
- Any purchases planned?

### Feeder Systems

- Outstanding Purchasing card transactions from any of the Purchasing Card holders who use the grant?
- Have you notified all feeders of new fund number?
- Have you notified all Procurement Card holders who use the grant?

### Payroll

- Have all payroll distributions been updated?**
- Are there outstanding payroll reallocations?**

### Function Override

- Consider all of the above.
- Only Research Services (ORS) can unfreeze fund.

### General

- Freeze will affect all ORGs using fund

