501 PA354: Close a Non-Federal Customer Contract

Close a Non-Federal Customer Contract Overview

This job aid details the steps to close a non-federal customer contract.

You should only close a contract after the contract has fulfilled the contract terms. Once the contract is **Closed**, it can no longer be used, amended, or reactivated. Closed contracts are removed from processing and views, but the historical contract data is still available for query.

To close a non-federal contract:

- Verify the related **Revenue Plan** and **Billing Plan statuses** are **Completed**.
- If there are amendments, verify they have a status of **Complete** or **Cancelled**.
- For rate-based contracts, if there are any prepayments, verify they have a status of **Complete** or **Inactive**.
- Update if necessary.

The process to close a non-federal contract is the same regardless of the contract type.

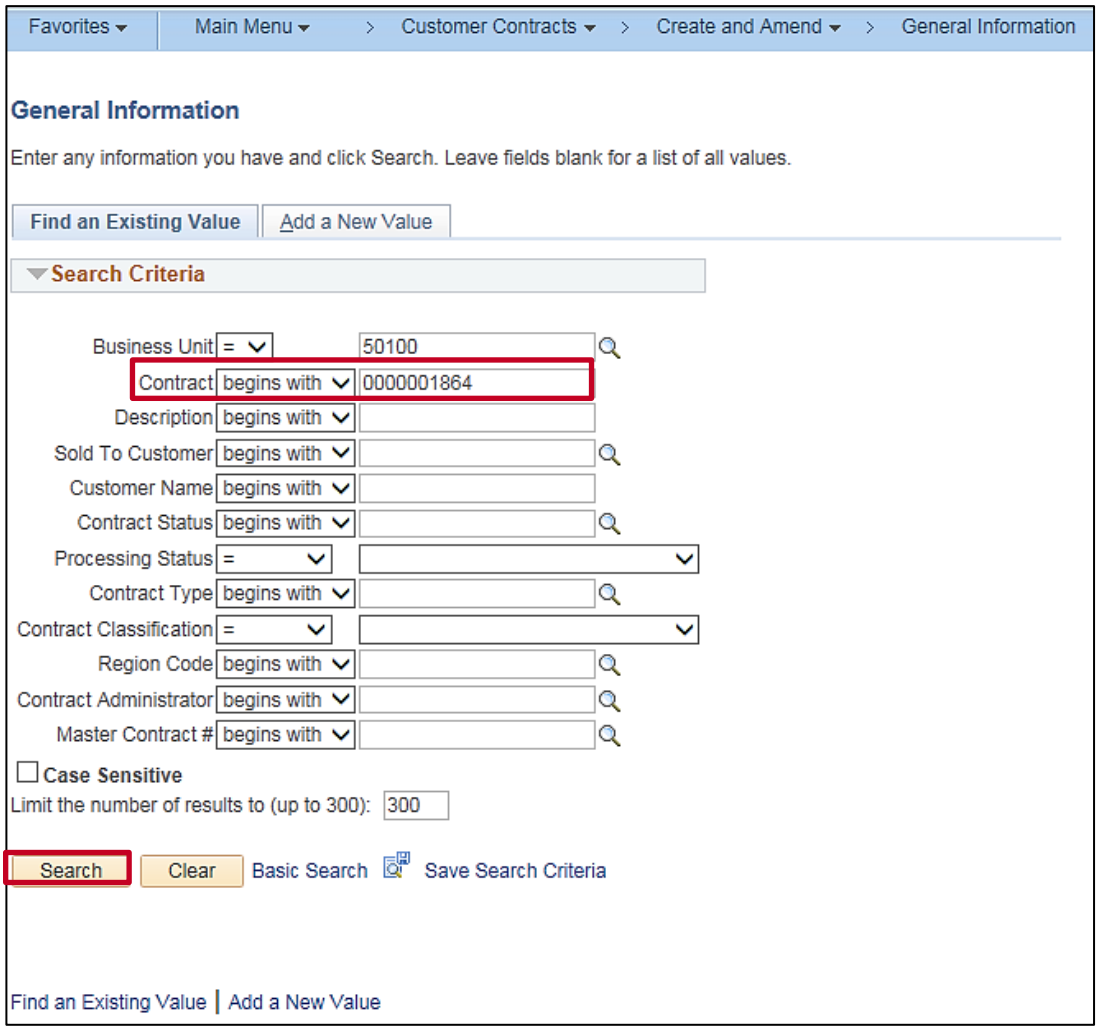
Table of Contents

Steps to Close a Non-Federal Customer Contract 2

Steps to Close a Non-Federal Customer Contract

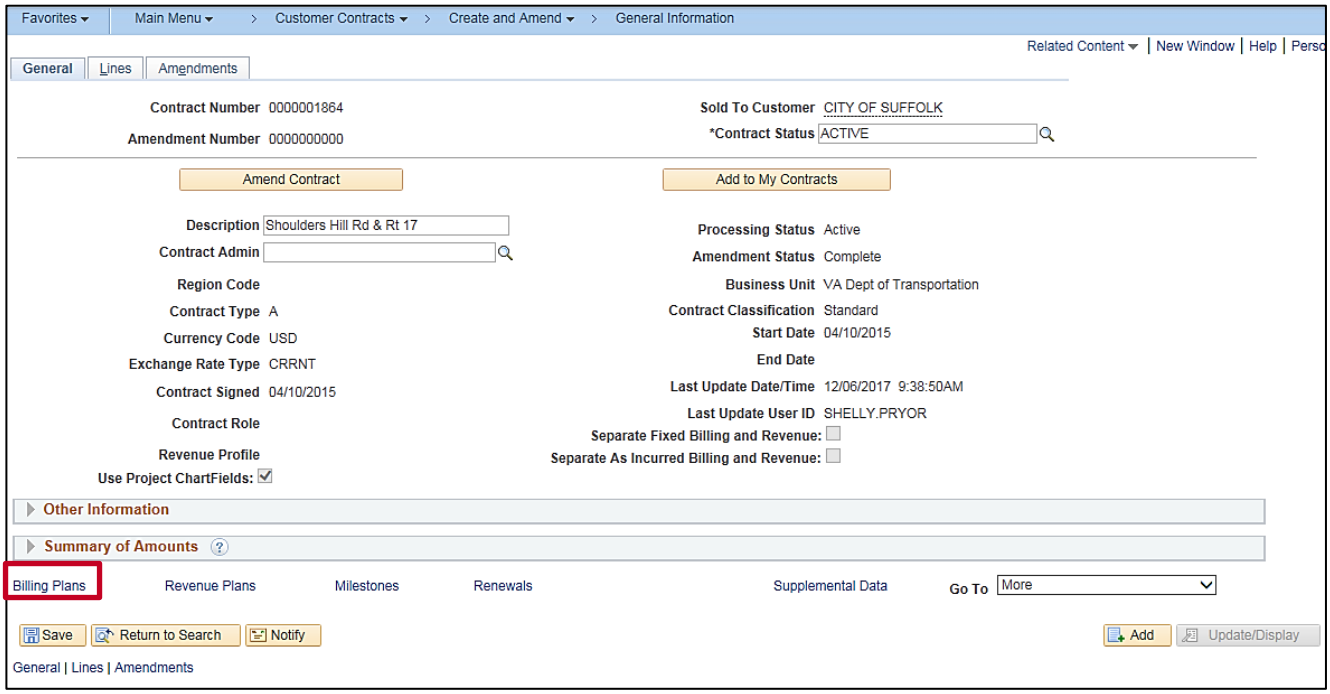
1. Navigate to the **General Information** page using the following path:

Main Menu > Customer Contracts > Create and Amend > General Information

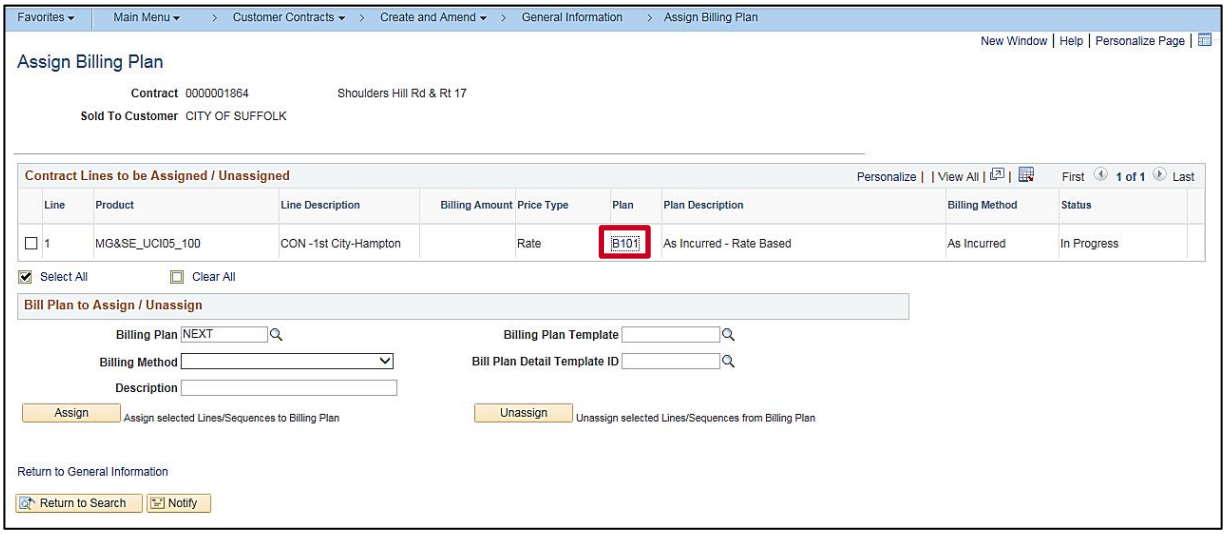


2. The **General Information** page displays. On the **Find an Existing Value** tab, enter the Contract number in the **Contract** field.

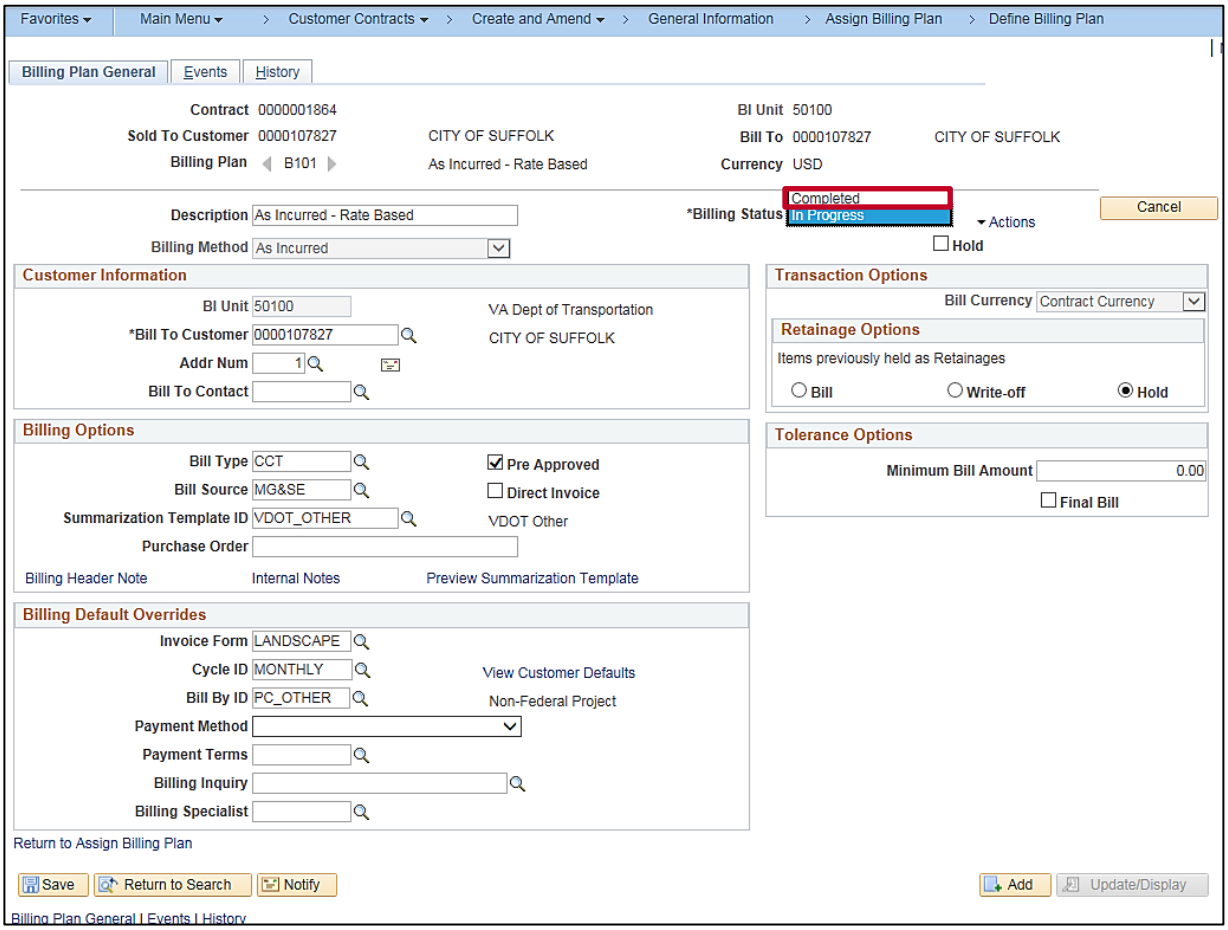
3. Click the **Search** button.



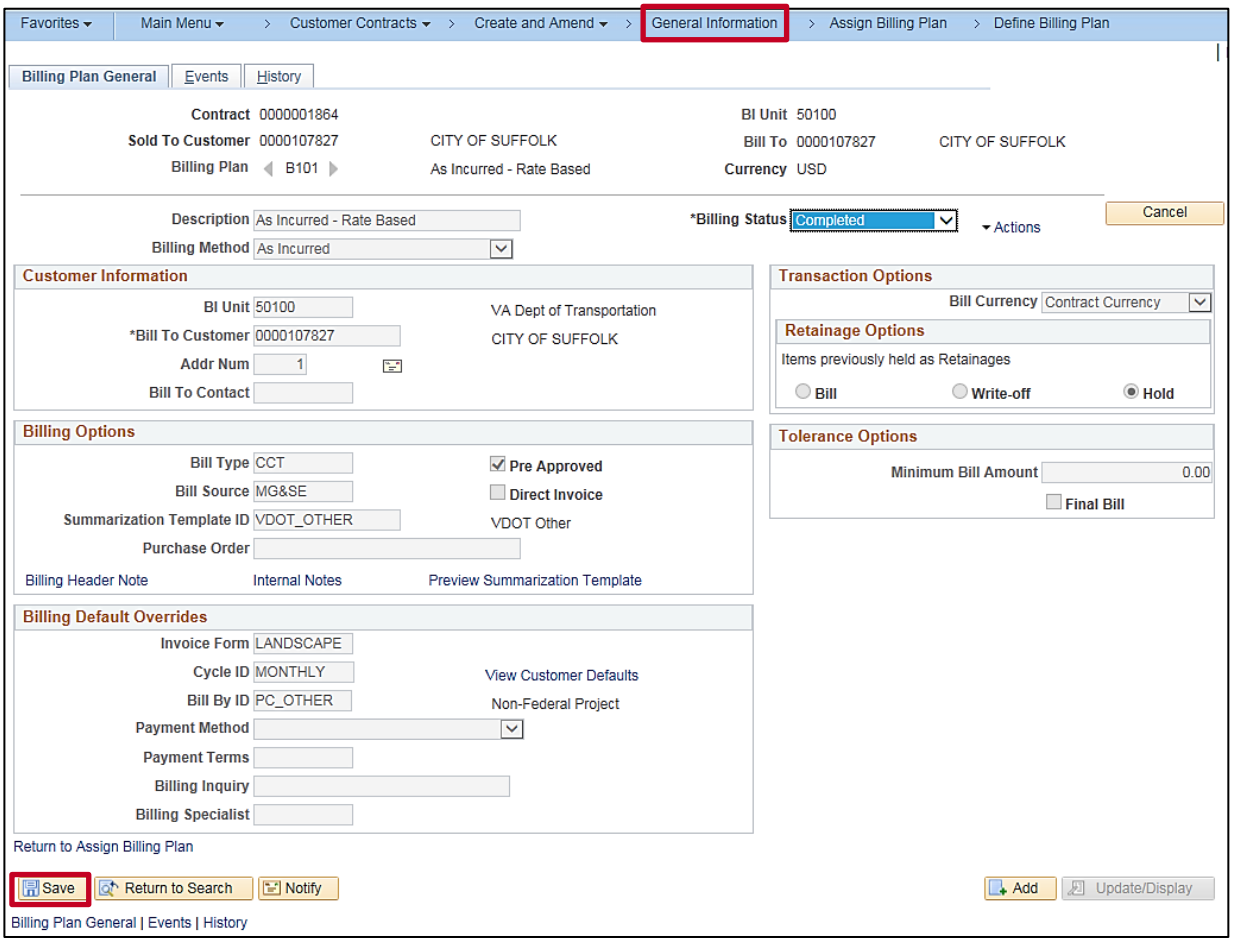
4. The **General** tab displays. Click the **Billing Plans** hyperlink.



5. The **Assign Billing Plan** page displays. Click the **Plan** hyperlink for the **Contract Line** you want to update (e.g., **B101**).

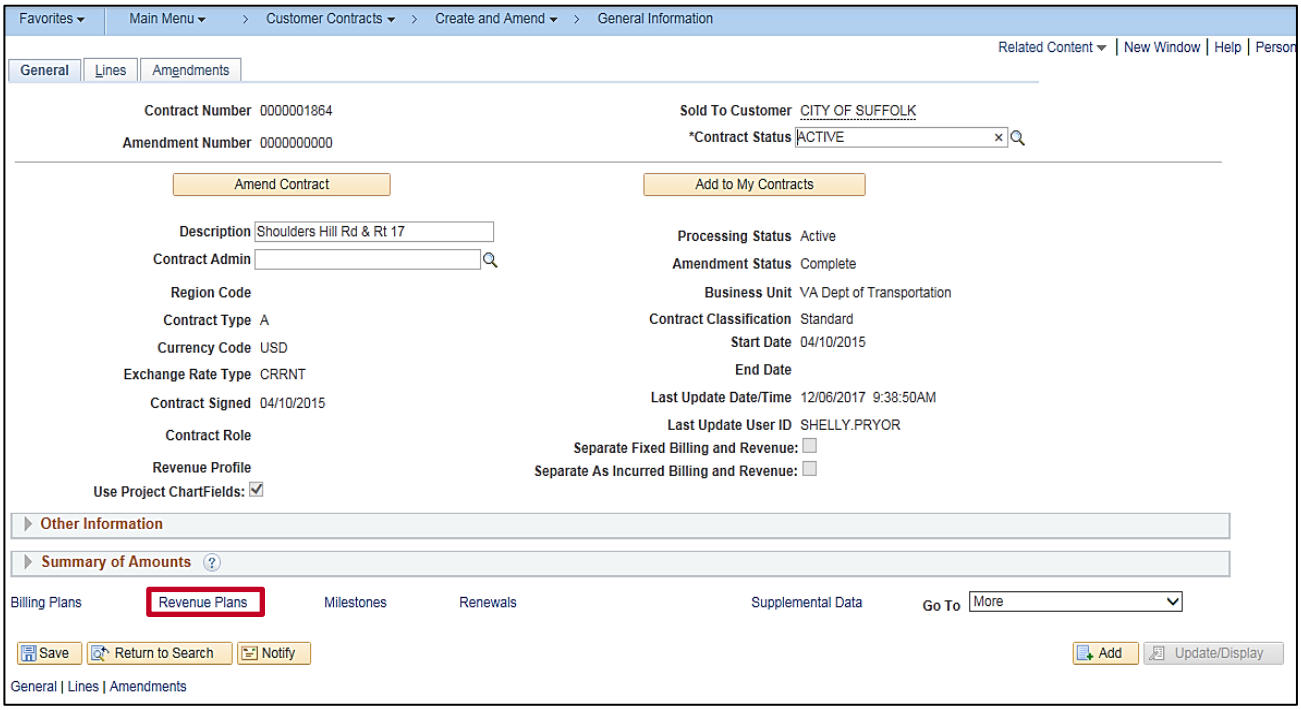


6. The **Billing Plan General** tab displays.
7. Click the **Billing Status** drop-down arrow.
8. Select **Completed**.

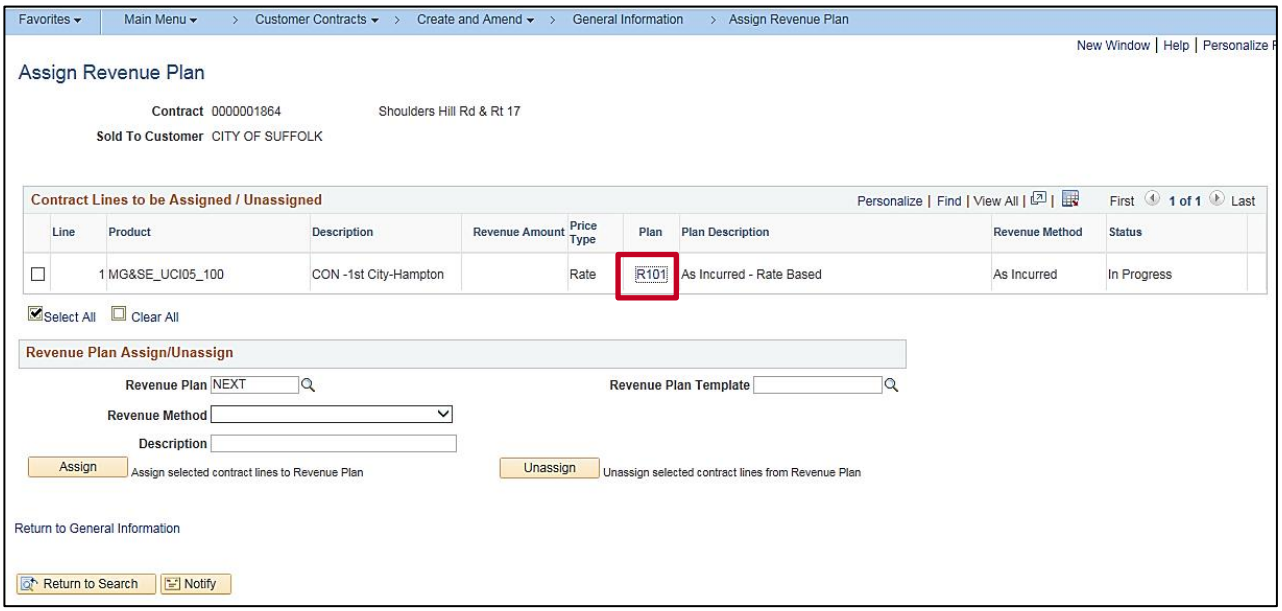


9. Click the **Save** Button.

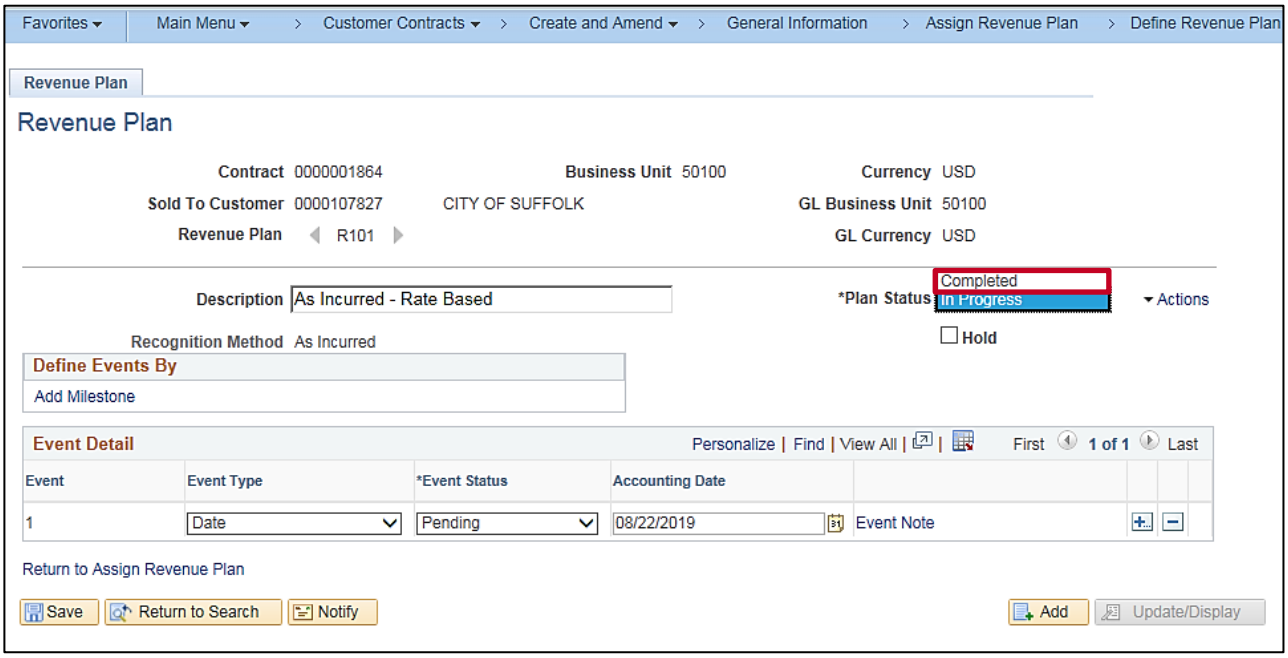
10. Click the **General Information** link in the navigation path at the top of the page.



11. The **General Information** page returns. Click the **Revenue Plans** hyperlink.

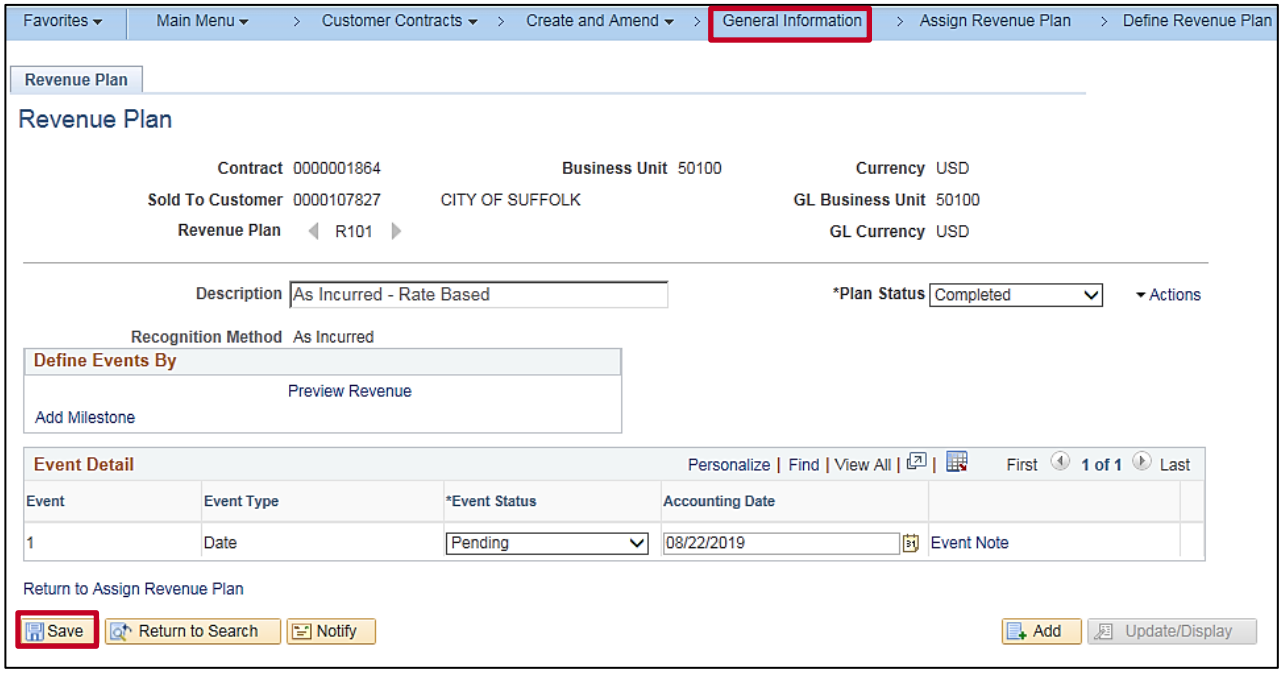


12. Click the **Plan** hyperlink for the **Contract Line** you want to update (e.g., **R101**).



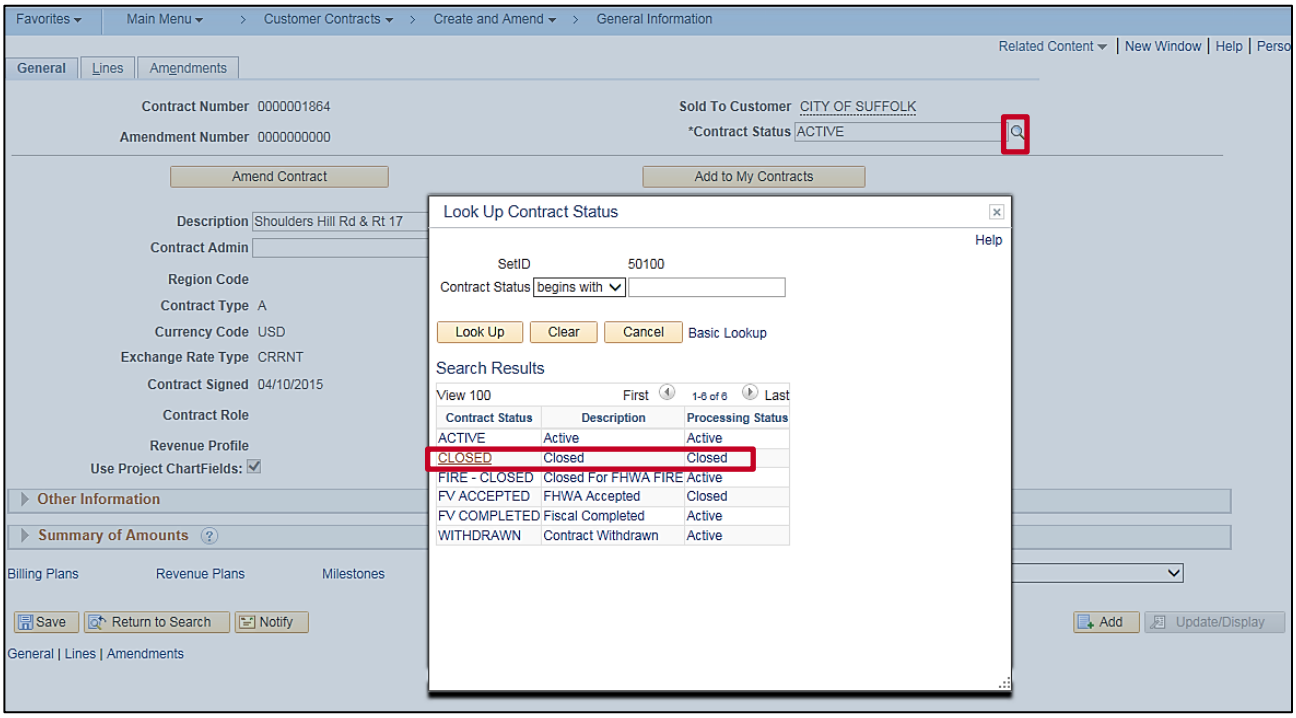
13. The **Revenue Plan** tab displays. Click the **Plan Status** drop-down arrow.

14. Select the **Plan Status** of **Completed**.



15. Click the **Save** button at the bottom of the page.

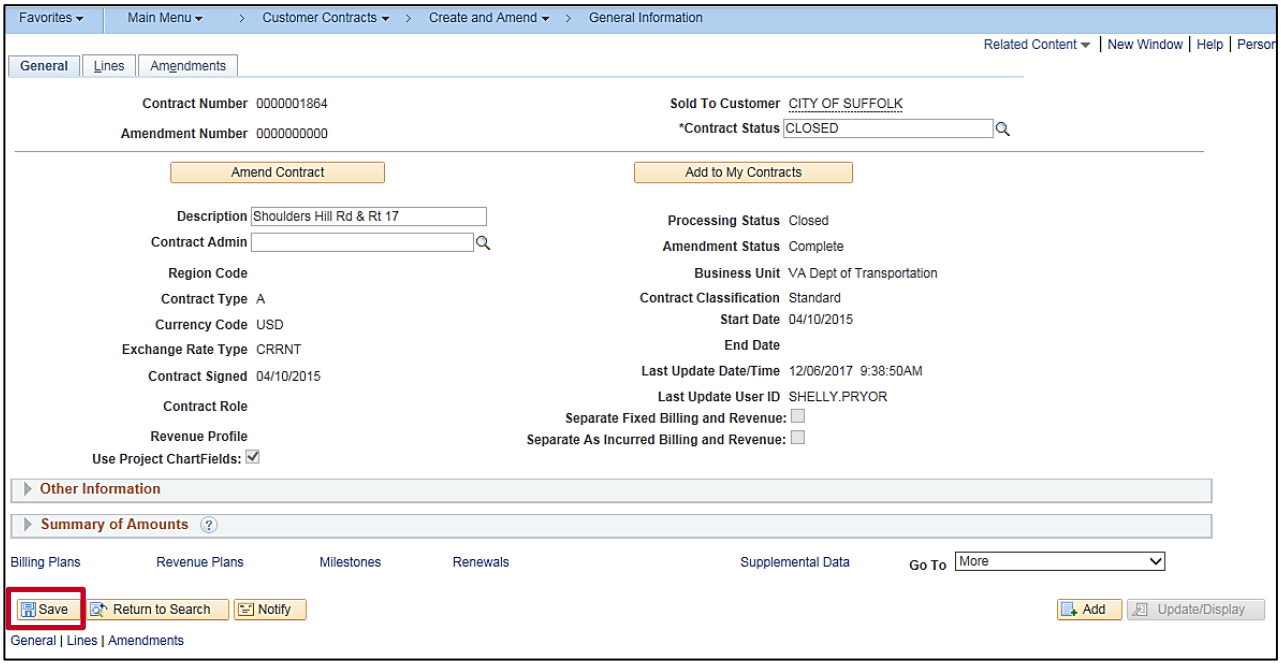
16. Click the **General Information** hyperlink in the navigation bar at the top of the page.



17. The **General Information** page, **General** tab, for your selected contract, displays.

18. Click the **Contract Status** lookup icon.

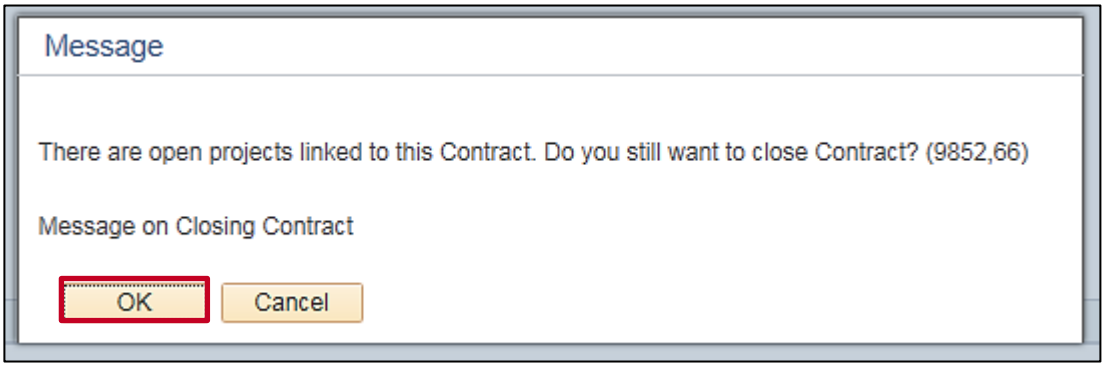
19. Select the **Contract Status** of **Closed**.



20. Click the **Save** button.

21. The project is closed.

The image below and 3 steps were in the old job aid. Do we need to keep it?



22. In some instances, a message displays indicating a project linked with the contract is still open.

23. Click the **OK** button.

24. The contract is now closed.