Accounting, Engineering & Planning: Tasks Inactive/Active

**Objective/Purpose/ Why:** Provide guidelines for the appropriate time to update a Project or Project tasks to inactive or active and the required method to request Accounting make the change.

**Outcome:***To understand the difference between updating a project active status at project level and task level. How to better manage the financial health of a project by limiting chargeable labor through the actions of making tasks inactive or active as well as understanding Accounting requirements for making those changes.*

**Subject Matter Expert: Project Accountant, Project Controller**

**Process: Task management is limiting the charging activity to various or all tasks on a project that is in *active* status to maintain the financial health of a project.**

Step 1: During the financial management of a project, Project Managers and Project Accountants may request to update tasks to:

* inactive when:
  + task activity is complete and can no longer be invoiced.
  + the JTD Spent on a task exceeds the task budget and activity must cease or be suspended until additional/alternative funding is approved.
  + charging to a task needs to be temporarily suspended while the project/task is on hold pending future activity.
  + a project has received a stop work notification.
* active when:
  + a project/task is no longer on hold due to client request for a task/additional work/comments.
  + funding has been approved for additional activity on a task that the JTD Spent has exceeded the budget whether by reallocation or supplemental budget.
  + a stop work notification has been lifted.

Step 2:

* Submitting a request to Accounting:
* Submit by email only for documentation purposes.
* Project Managers and Deputy (Assistant) Project Managers may submit the request but must include a cc to the other. Additional staff may be included as is necessary. It is the responsibility of the requestor to inform the applicable team members of changes to task availability.
* The Project Accountant(s) and Project controller must be included on the email to ensure availability of Accounting staff to complete the request in a timely manner.
* Accounting submits a request to the Project Manager:
  + Submit by email only for documentation purposes.
  + Additional staff may be included as is necessary, but it is the responsibility of the Project Manager to inform the applicable team members of changes to task availability if the update is approved.

Step 3: An exception to the request process will be when the Project Accountant proactively updates all tasks on a project to inactive when an account is in arrears >90-days and requests for payment have not been successful. The Project Accountant will update tasks to active when payment has been received. The Project Manager will be informed when either action is performed.

**Process: Project active status will only be updated to inactive during the closeout process, not for the purposes of limiting task availability because of funding or temporary holds. Any other reason for updating a project status to inactive will be reviewed on a case-by-case basis.**

Step 1: Project Managers or Deputy (Assistant) Project Managers, that includes a cc to the PM, may submit a request to closeout a project by email to the Project Accountant and cc the Project Controller. Include confirmation of having filled out a closeout form that has been saved to the project folder.

**Resources:**