

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	WASHINGTON	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	WASHINGTON	23-FEB-04	UTZU NE	25-NOV-03
6654417	5 R01 NS 36526 - 8	TEUSCHER	2003	WASHINGTON	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	WASHINGTON	09-MAR-04	UTZU NE	
6787873	1 R43 NS 48668 - 1 A1	WROBLEWSKI	2004	WASHINGTON	09-MAR-04	UTZU NE	

Done Local intranet

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 **2** Subproject ID FY Appl. Status Group Appl ID
 PI Name (L, F MI) Primary PCC RFA PA #
 Institution Percentile Council Date
 Institution Priority Score Budget Start
 City State
 Current Assignment (L, F MI) Select Current Assignment Clear
1

HIT LIST Run Query Create Record Create WIP Discard WIP **5**

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"

IMPAC II Home
Applications
Web Applications
Tech Info
Deployment
Training
Support
Search

COOL TOOLS

> [Home](#) > [Tools](#)

The links below were developed to help me to solve some particular problem or at the suggestion of some clever user who needed some help retrieving information. The links below will either run a query or take you to a form. Have an idea for a query? Let me know - If it's easy, maybe I'll try it.

IPF QUERIES ([expanded list](#))

[IPF Name Search](#), [IPF Geo Search](#), [IPF Snap](#), [IPF Active Grant Search](#), [IPF ALL Grant Search](#), [Missing IPF Search](#)

EIN QUERIES ([expanded list](#))

[EIN Search by Name](#), [EIN Search by Number](#), [FDP List](#)

GRANTS QUERIES ([expanded list](#))

[IRDB Grant Search](#), [IRDB PI Search](#), [Assignments](#), [Animal Subject Bar List](#), [Human Subject Assurance Tracking List](#), [Human Subject Bar List](#), [Human Subject Conditional Award List](#), [Signed \(but not released\) WIP Search](#), [Old WIP Search](#), [Unawarded Administrative Supplement Search](#), [Pending Training Appointment Forms \(2271\)](#), [NRSA "All Years" Grant Report](#), [Closeout Reports](#), [FSR Status](#)

SYSTEM QUERIES ([expanded list](#))

[IMPAC II IMPP Table/Column Search](#), [IMPAC II IRDB Table/Column Search](#), [IRDB Schema Changes](#), [OLTP Schema Changes](#), [Transfer Request Log Search](#), [Person Roles and Info](#), [Accession Number Search](#), [Organization Info](#), [Appl Dumphing](#), [IRDB MV Information](#), [User ID Status](#), [Print Queue Status](#)

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

IMPAC II Home
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GRANTS QUERIES

> [Home](#) > [Tools](#) > [GRANTS Queries](#) > [Unawarded Administrative Supplement Search](#)

Unawarded Administrative Supplement Search

Select IC: Press button to run.

This query allows you to search the IMPAC II database for old unpaid Admin supplements that had been created in IMPAC II GM Module. Records should routinely be reviewed by Grants Management Staff. If the Supplement is no longer needed, the record should be deleted. Use the IMPAC II GM module to delete unwanted Admin Supplements. Query on the record number. Click on the red "X" on the tool bar to delete. In some cases if the WIP has already been deleted, you will need to create the WIP in the GM module in order to delete the Supplement record.

While leaving these records in the system does not really hurt anything from a data perspective, it may present misleading information to budget offices or others that may be using query tools to try to project what will or will not be paid this year. These records would most likely also cause confusion if you decide to supplement the parent record and old admin supplement already exists. Just good housekeeping..

Note: Returned list will be sorted in order of the date that the supplement was created so you may deal with the oldest records first.

[ABOUT IMPAC II](#) [CONTACT US](#)

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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	KENNEDY	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

The screenshot shows the IMPAC-II - GM - [Search] window. The top menu bar includes File, Edit, Report, Custom, action, Links, Window, and Help. Below the menu is a toolbar with a red 'X' icon (callout 5), navigation arrows, and buttons for Assign, ICSTORE, Admin, Award, and Release. The 'QUERY PARAMETERS' section contains fields for Grant# (LOV), ICD (NS), Subproject ID, FY, Appl. Status Group, Appl ID, Primary PCC, RFA PA #, PI Name (L, F MI), Institution, City, State, Current Assignment (L, F MI), and Priority Score. Callout 2 points to the 'Grant#' field. Callout 3 points to the 'Run Query' button. Callout 1 points to the 'Clear' button. Below the query parameters is the 'HIT LIST' section with buttons for Run Query, Create Record, Create WIP, and Discard WIP. The 'HIT LIST' table has columns for WIP, Exist?, ESNAP?, Grant#, Subproj ID, PI Name (L, F MI), GS Assignment, Budget Start Dt, and SITS. The table contains several rows of data, with the third row highlighted in blue. Callout 4 points to the 'WIP' column header.

WIP	Exist?	ESNAP?	Grant#	Subproj ID	PI Name (L, F MI)	GS Assignment	Budget Start Dt	SITS
			2 P50 NS 39788	6 A1	WOOTEN, GEORGE F	LOEWE, MICHAEL	04/01/2005	
			2 P50 NS 39788	6	WOOTEN, GEORGE F	Simmons, Sheila	04/01/2004	
			3 P50 NS 39788	5 W2	WOOTEN, GEORGE F	Simmons, Sheila	08/01/2003	
			3 P50 NS 39788	5 S1	WOOTEN, GEORGE F	Simmons, Sheila	08/01/2003	
			5 P50 NS 39788	5	WOOTEN, GEORGE F	Simmons, Sheila	08/01/2003	
			3 P50 NS 39788	4 S1	WOOTEN, GEORGE F	Wilkom, Gavin	08/01/2002	

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

IMPAC II - QuickView - [IMPAC II - QuickView]

File Edit QuickView Report Custom actionN Window Help

Grant Folder ICSTORE Overview PI/Staff Organization Budget

QUERY PARAMETERS

Grant# (LOV) ICD Subproject ID Former Grant#? PI Name (L, F MI) Institution EIN CAN SSN IPF Code RFA PA Council Date SRA Flex SRA Des Code Primary PCC Appl ID

Active Grants ☐ Text Search ... Text criteria exists? ☐ State

HIT LIST Run Query Grant Snapshot Report Hit List Report

Grant#	Subproject ID	PI Name (L, F MI)	Project Title
5 F31 AA 5576 2		ZAWACKI,TINA M	ALCOHOL'S ROLE IN DECISIONS TO DRIVE AFT
5 F31 AA 5594 3		GRAHAM,DANIELLE L	ADOLESCENT ETOH WITHDRAWAL: EFFECT OF
5 F32 AA 5600 2		PALMER,ABRAHAM A	ETHANOL AND ALLOPREGNANOLONE--COMM

QV1010 Problems? Call the Help Desk (301)402-7469 helpdesk@od.nih.gov 07/13/04 22:30

Project Title

Record: 1/3

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'

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.)

The screenshot shows the 'IMPAC-II - GM - [Search]' window. The 'QUERY PARAMETERS' section has 'Grant# (LOV)' set to 'NS' and '41714' (circled 2). The 'Subproject ID' is '2' (circled 2). The 'App'l. Status Group' is 'Primary PCC' (circled 5). The 'Hit List' table shows two rows for 'JOHNSON, MARK D'. The first row has 'WIP Exist?' as '1' and 'Budget Start Dt' as '1/2002'. The second row has 'WIP Exist?' as '1' and 'Budget Start Dt' as '1/2001' (circled 3). The 'Create WIP' button is circled 4. The 'Admin' button is circled 5. The status bar at the bottom shows 'WIP NEEDED TO PROCESS THE AWARD; SELECT RECORD & CREATE WIP IF NOT ALREADY THERE.'

The screenshot shows the 'IMPAC-II - GM - [Administrative Review]' window. The 'APPLICATION' section shows 'Grant# 1 F32 NS 041714 1' (circled 7) and 'Institution UNIVERSITY OF WASHINGTON'. The 'ADMINISTRATIVE REVIEW' section has 'Early Terminate Project' checked (circled 6). The 'Project End' date is '12/31/2001' (circled 6) and 'Budget End' is '12/31/2001' (circled 6). The 'Aids-related' section has 'Yes' selected. The 'Council Meeting' section has 'EIN 1916001537A1' and 'Priority Score 138'. The 'GS' section has 'Washington, James' (circled 8). The 'Animal Subjects' section has '30' and 'Animals involved - no SRG c' (circled 8). The 'Human Subjects' section has '0' and 'No human subjects involved'. The 'Early Award Termination' dialog box is open, asking 'A type 5 future year grant exists for this project. Do you want to continue to terminate this project?' with 'Yes' and 'No' buttons (circled 8).