9.2 Activating a Cost Reimbursable Contract

Purpose: Use this document as a reference for activating a cost reimbursable contract in ctcLink.

Audience: Settlement Manager, GL Accountant.

⚠ You must have at least one of these local college managed security roles:

- ZC Contracts Processing
- ZZ Contract Maintenance
- ZZ Contract Processing

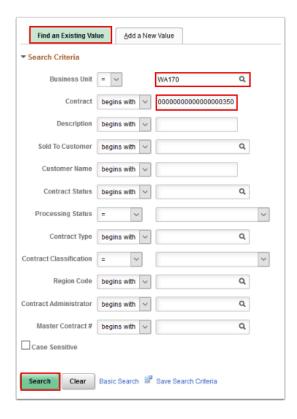   You must also set these User Preference Definitions:

- FSCM 9.2 - Grants Security

    If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.
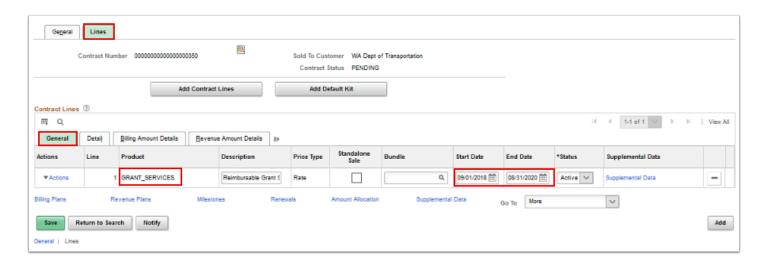
Activating a Cost Reimbursable Contract

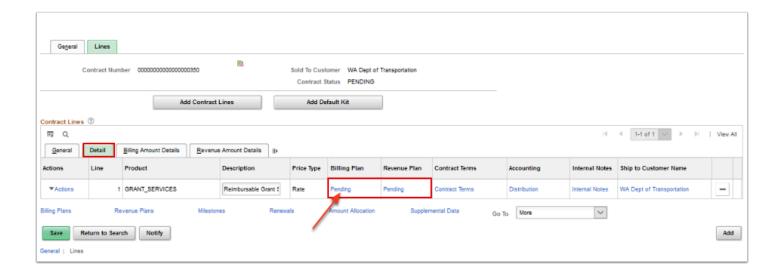**Navigation: NavBar > Navigator > Customer Contracts > Create and Amend > General Information**

1. On the **General Information** search page, select the **Find and Existing Value** tab.
2. Enter or look up the **Business Unit**.
3. Enter or look up the **Contract** Number (same as the award number)**.**
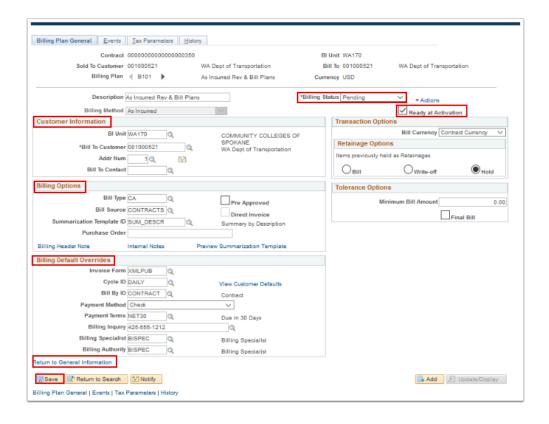4. Select **Search**. The **General Information** page will display.

5. Select the **Lines** tab.
6. Under the **Lines** tab, select the **General** tab to verify the following contract details.
7. Make sure the **Product** is correct for the type of contract.
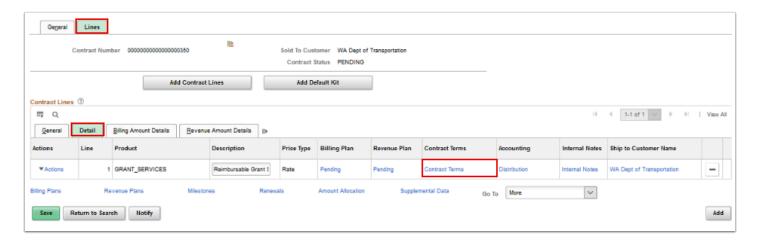8. Make sure the **Start Date** and **End Date** on the contract line match the awarded period.

9. Select the **Detail** tab to verify the following contract details.
10. Make sure the **Bill Plan** and **Revenue Plan** are set to pending.
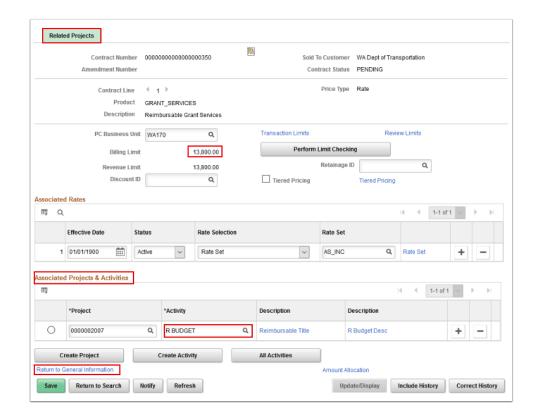11. Select the **Pending** link under the **Billing Plan**. The **Define Billing Plan** page will display.

12. On the **Billing Plan General** tab, review the **Customer Information**, **Billing Options**, and the **Billing Default Overrides** for any data that needs to be updated.

> ℹ️ **Note:** The **Billing Status** is set to **Pending** and the **Ready at Activation** checkbox is checked. This will allow the bill plan to become activated when the contract is set to **Active**.

13. Select **Save**.
14. Select the **Return to General Information** link.

15. On the Lines tab, under the **Details** tab, select the **Contract Terms** link. The **Contract Terms** page displays.
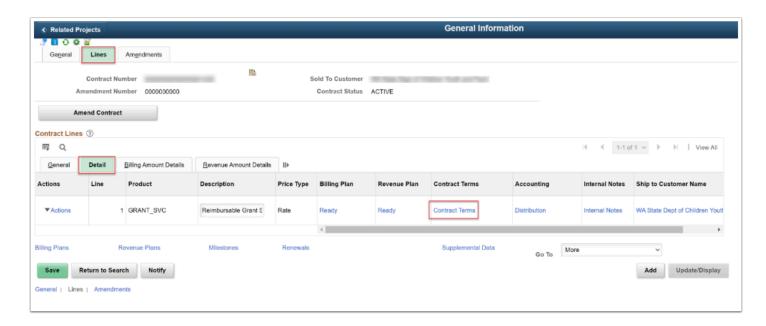

16. On the **Related Projects** tab, verify the following contract terms.
17. Ensure that all **Associated Projects** for this contract are listed on this page.
18. Ensure that the **Activity** is correct for the **Project**.
19. Ensure the **Billing Limit** matches the award amount for the award.
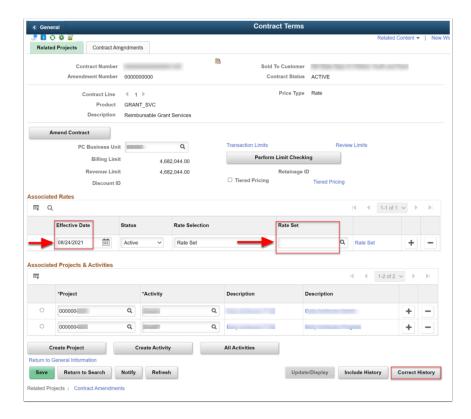20. Select the **Return to General Information** link.

> ❗ What if your **Contract Rate** is *Blank* or has an incorrect **Effective Date**? Follow the steps to correct the 'Rate Set'.

21. Select the **Lines** tab page.
22. Select the **Detail** tab.
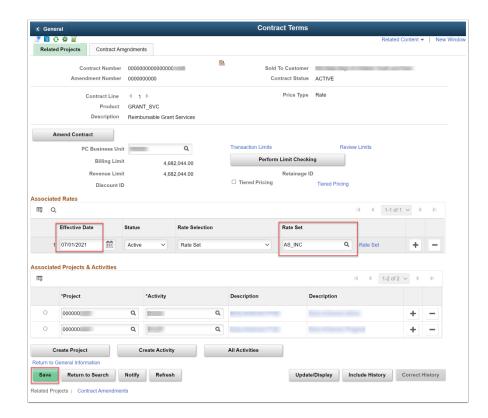23. Select the **Contract Terms** link.

24. The Contract Terms page displays.
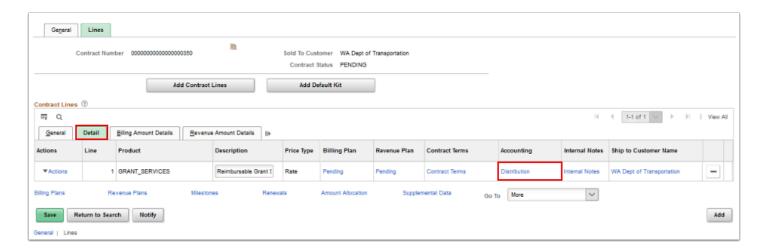25. Select the **Correct History** button.

> 💡 Note: The **Effective Date** will default to the *current date* and the **Rate Set** is *Blank*.

26. Update the **Effective Date** to the **Start Date** of your Grant/Contract.
27. Select **AS_INC** in the Rate Set lookup field (if a Cost Reimbursable Contract or As Incurred).
28. Select **Save.**
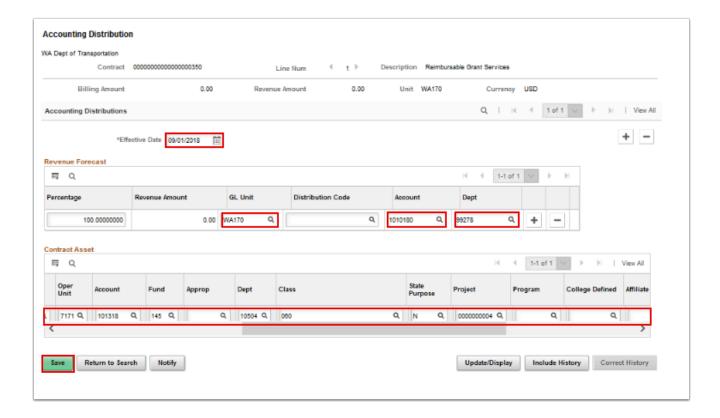

29. On the lines tab, select the **Detail** tab.
30. Select the **Distribution** link under **Accounting** for the line. The **Accounting Distribution** page will display.

31. Use the **Accounting Distribution** page to complete the contract accounting details. The next several steps are to add the Revenue account code to the contract for reporting purposes.
32. Verify the effective date of the contract in the **Effective Date** field. *(If you are attempting to change a record that is effective dated, and the record contains an effective date that makes it either the current record or a historical record, use the Add button [+] to create a*

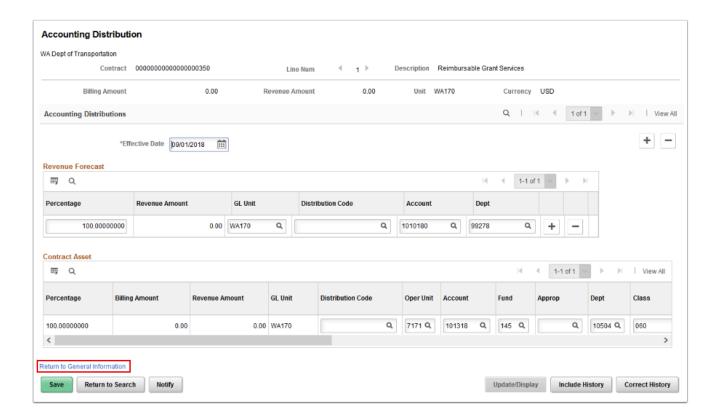***new record with a future effective date or change your mode of correction by selecting the Correct History button).***

33. In the Revenue Forecast section, enter or select the GL business unit for this account in the **GL Unit** field.
34. In the Revenue Forecast section, enter or select the revenue account in the **Account** field.
35. In the Revenue Forecast section, enter or select the revenue department in the **Dept** field.
36. In the Contract Asset section, complete the required ChartField entries for the contract, i.e. **Account**, **Oper Unit**, **Fund**, **Dept**, **Class**, **Project**, and **State Purpose**.
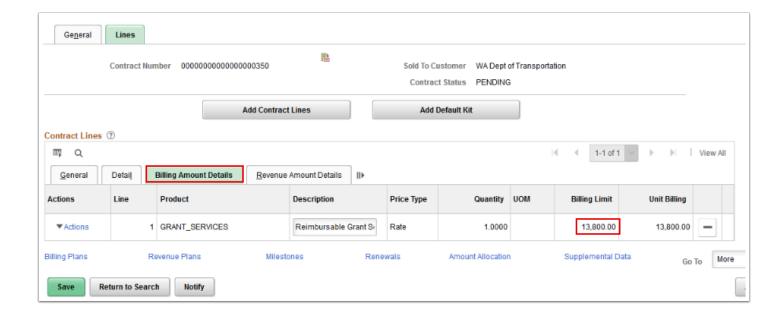37. Select **Save**.

38. A message indicating that the UAR accounting distribution was changed will display.
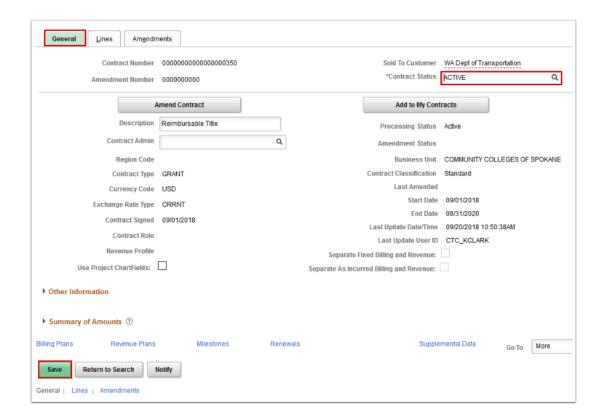39. Select **OK**.

40. On the **Accounting Distribution** page, select the **Return to General Information** link.

41. On the **Lines** tab, select the **Billing Amount Details** tab.
42. On the **Billing Amount Details** tab, ensure the **Billing Limit** on the Contract Line is the same as the awarded amount.

43. Select the **General** tab to update the status of the contract.
44. Enter or select the new status in the **Contract Status** field to change the contract status to **ACTIVE**.
45. Select **Save**.

46. Process complete.