***PROCESS FOR CLOSING REQUESTS IN TMA***

**The “ARE YOU STILL INTERESTED?”**

When a project request (Estimating or Planning with Estimating) reaches 60 days old:

OR

When a Just Do It project request reaches 60 days old:

**Open TMA, select the appropriate request number**

Change Status to: **“Request in Queue for Closing”**

Add Comment:

**00/00/0000 00:00 LNAM – Request in queue for closing; web email sent to customer.**

Example: 12/04/2012 17:10 BRAZ - Request in queue for closing; web email sent to customer.

**Send web mail to customer from within TMA; copy estimator Tonya Miller-Swift in cc: line.**

Add: project request title to the subject line.

Address the customer and BAO/others by name.

Text as follows:

Please note that the *Estimate* for the *Project Request* referenced in the subject line above is nearing expiration. Estimates expire after 90 days, and must be re-evaluated in order to proceed. If you would like to continue with this work, please have your Business Affairs Officer provide the appropriate funding information (index or IRB) to [au2659@wayne.edu](mailto:au2659@wayne.edu) (Deb Brazen, Director of Planning & Estimating) as soon as possible, or contact her directly to discuss the project. Once the estimate reaches the 90-day mark, a final notification of cancellation will be sent. At that point we will assume that you do not wish to proceed, and your request will be canceled after five business days. PLEASE DO NOT REPLY TO THIS EMAIL.

**Please note on the physical folder:** Fill in the appropriate square on the folder, date and initial.

**The “HEY, WE’RE GOING TO CLOSE THIS”**

When a project request (Estimating or Planning with Estimating) reaches 90 days old:

OR

When a Just Do It project request reaches 65 days old:

**Open TMA, select the appropriate request number**

KEEP Status at: **“Request in Queue for Closing”**

Add Comment:

**00/00/0000 00:00 LNAM – No response; close after (5 days from date of web email)**

**Send web mail to customer from within TMA; copy estimator Tonya Miller-Swift in cc: line.**

Add: project request title to the subject line.

Address the customer and BAO/others by name.

Text as follows:

Please note that the estimate for the attached *Project Request Estimate* is over 90 days old. Estimates expire after 90 days and must be re-evaluated in order to proceed. If you wish to continue with this request, please have your Business Affairs Officer provide the appropriate funding information (index or IRB) to [au2659@wayne.edu](mailto:au2659@wayne.edu) (Deb Brazen, Director of Planning & Estimating) within the next week, or contact her directly to discuss the project. If you cannot fund the request at this time, please note that we can provide a new estimate upon submittal of a new *Project Request.* If we do not hear back from you after five business days from today, we will assume that you do not wish to proceed, and your request will be canceled. PLEASE DO NOT REPLY TO THIS EMAIL.

OR

(For Just Do It):

Please note that the estimate for the attached *Just Do It* is over 60 days old. Estimates expire after 90 days and must be re-evaluated in order to proceed. If you wish to continue with this request, please have your Business Affairs Officer provide the appropriate funding information (index or IRB) to [au2659@wayne.edu](mailto:au2659@wayne.edu) (Deb Brazen, Director of Planning & Estimating) within the next week, or contact her directly to discuss the project. If you cannot fund the request at this time, please note that we can provide a new estimate upon submittal of a new *Project Request.* If we do not hear back from you after five business days from today, we will assume that you do not wish to proceed, and your request will be canceled. PLEASE DO NOT REPLY TO THIS EMAIL.

**Please note on the physical folder:** Fill in the appropriate square on the folder, date and initial.

**The “REJECT”**

After a project request (Estimating or Planning with Estimating) expires:

OR

When a Just Do It project request expires:

**Open TMA, select the appropriate request number**

Change Status to: **“Cancelled”**

Add Comment:

**00/00/0000 00:00 LNAM – Project estimate expired (OR) Project did not proceed; a new request will be entered if funding is made available.**

**Take the folder from Tonya’s desk and bring it to Deb’s office for filing.**

Fill in the appropriate square on the folder, date and initial.

**Updated 1/8/13**