



## ***Principal Investigator's Closeout Checklist***

For sponsored projects to be properly closed out and reported to the sponsor, the items below need to be reviewed prior to closeout.

1. Have you reviewed all expenditures to ensure that they are reasonable, allowable, and allocable?
2. If applicable, have you verified that all personnel costs, including those with release time, have been properly charged to your grant?
3. If applicable, have you provided a 30-day written notification to the employee with a copy to Human Resources. Have you generated a termination EPAF.
4. If applicable, have you certified all time and effort reported on your project?
5. Have you cleared out all open encumbrances from your budget?
6. Have you followed up on pending requisitions and purchase orders to ensure timely receipt of goods and services and/or timely receipt of invoices from vendors.
7. If you have a travel advance for grant related travel, have you returned any unspent money to the Business Office?
8. If applicable, have you completed paperwork to release payment on all sub-contracts? The final invoice is required as specified in the terms of the subcontract.
9. If applicable, have you turned in all cost share (cash, in-kind, personnel, space, etc.) documentation to Grants and Contracts? Make sure all paperwork is complete and properly supported (copy of Purchase Requisitions, Purchase Orders, Invoices, etc.).
10. If applicable, has all equipment purchased been accounted for on your sponsored project?
11. Have you properly maintained and stored all records/documents? You are required to maintain all official records and supporting documentation pertaining to your grant, for a period of ten (10) years.
12. Have you prepared all required sponsor/agency reports (final performance, technical, property, patent, etc.)?