ME PI Award Closeout Checklist

Sponsor:	End Date:
Speedtype:	Award/Project:

- ☐ 1. Do you need to request a **no cost extension**?
  - ☐ If yes, work with your finance professional to submit the request.
- ☐ 2. Verify that the project is current with all prior **reporting requirements**.
  - ☐ Refer to the award terms & conditions/contract requirements, or reach out to ocgcloseout@colorado.edu for assistance.
- ☐ 3. Are there any **cost share commitments**?
  - ☐ If so, have they been met?
  - ☐ Were there any in-kind commitments?
- ☐ 4. Were there any **equipment fabrications** (has a total acquisition cost of $5,000 or greater and a useful life of at least one year) ?
  - ☐ If so, has the fabrication been completed and tagged?
  - ☐ Will the equipment be delivered to the sponsor?
  - ☐ Questions related to fabrications may be sent to property@colorado.edu.
- ☐ 5. Are any physical **supplies** that were purchased for this award still remaining?
  - ☐ If more than $5,000 worth remain, make an inventory of products and their value for reporting purposes.
- ☐ 6. Has **equipment** been purchased on this award (has a total acquisition cost of $5,000 or greater and a useful life of at least one year)?
  - ☐ If so, work with finance staff to compile tag numbers and determine ownership and disposition of equipment.
  - ☐ Is there **government or sponsor titled property** on this award?
  - ☐ If yes, have we requested or received disposition? (Online DCPR)
  - ☐ Contact OCG (ocgproperty@colorado.edu) to schedule an inventory in preparation for the final report.

- ☐ 7. If any **inventions, patents, or copyrights** have resulted from this award, verify that the appropriate paperwork has been sent to Venture Partners at CU Boulder (formerly Technology Transfer Office).
  - ☐ If no new technology resulted from this award, notify OCG. (Email ocgcloseout@colorado.edu)
- ☐ 8. Verify that you and all of your students/direct reports are up to date with their **ePERS**
  - ☐ If you have questions, please contact ePERS@colorado.edu or visit ePERS Training | University of Colorado
- ☐ 9. Verify any **monthly recurring charges (auto-posted)** are moved to another SpeedType.
  - ☐ If the project ends mid semester, share your plan for where salaries will be funded after the term date with your finance professional.
- ☐ 10. Are there any pending **procurement card transactions or travel reports** that still need to be posted to the project? (Consider all PIs and any researchers on the project.) If yes:
  - ☐ Which expense reports are they on?
  - ☐ What is needed to have these processed as soon as possible?
- ☐ 11. Review and confirm that **all expenditures and labor charges** are allowable, allocable, reasonable and consistent with the terms of the agreement.
  - ☐ If any charges need to be moved, notify your finance professional and include a justification for the change.
  - ☐ Request and review the sensitive expenses report provided by your finance professional.
  - ☐ Provide detailed justifications for each item.
  - ☐ Guidance for writing a good justification is available at Examples of Justifications Matrix.xlsx
  - ☐ Why are justifications required? Cost Principles Policy Statement | Campus Controller's Office | University of Colorado Boulder Expense Detailed Justification.pdf - Google Drive