

Project Closeout Review/Checklist

PI Responsibilities

- Ensure all obligations and encumbrances are complete and all charges related to the project are appropriately charged to the account prior to the end date.
- Ensure any standard monthly charge back orders or arrangements (copy service, postage/shipping charges, phone service) are discontinued as of the end date or are changed to an alternate source.
- Ensure any personnel appointments which need to be changed to another salary source are completed at least 2 weeks prior to end date and that any required notices of non-renewal of appointment have been completed per [University Human Resources Rules, Policies and Procedures](#) or as otherwise described in [Hiring Research Personnel](#).
- [Faculty Handbook 8.I.: Annual Leave for Contract and Grant Salaried Employees](#):
 1. All contract/grant salaried employees are to take their annual leave within the grant or contract project contract dates. This policy should be clearly communicated to each employee at the time of hiring into the grant/contract salaried position. It is the responsibility of project administrators to monitor the leave-taking of the project employees to ensure that there is not leave accrued at the termination of the grant or contract.
 2. Employees in grant/contract salaried positions who are employed on more than one project should have their leave-taking pro-rated over the projects. If a project generated leave time, the project should be expected to bear its fair share of the leave cost. That being said, as a matter of practical consideration, some give and take may be possible if several projects are funded by the same agency, and where the interval between beginning and ending dates of a project is so short that it is impossible to take leave.

General principles/policies that apply with regard to annual leave of grant/contract salaried employees are

 - a. the university is not to be put in a posture of having to use non-project funds to pay for annual leave;
 - b. grant/contract salaried employees are to be informed at the time of employment that arrangements for annual leave must be made within the time-span between beginning and ending dates of the project; and
 - c. it is the responsibility of the project administrator (principal investigator) to manage employees' time so there are opportunities for the employees to take their annual leave.
- Coordinate any required documents or reports with [subrecipients](#).
- Work with the [Grants & Contracts Financial Manager](#) to insure required reports and/or invoices are submitted to the sponsor.
- Complete all required sponsor project reports and provide a copy to the [RSP Grants Specialist](#) for university files.
- If appropriate, disclose any [intellectual property](#) to RSP.
- Ensure all applications to [Institutional Review Board \(IRB\) for Human Research Participants Protection](#) are closed out.
- Ensure all applications to [Institutional Animal Care and Use Committee \(IACUC\)](#) are closed out.