
CAS Sponsored Research

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**Grant Closeout
Checklist**

The grant administrator will work with all departments involved to complete this form.

Principal Investigator and Project Information**Name****Funding Agency****Award End Date**

Award Number

Lewis & Clark Account Number

Project Title

Closeout Checklist**Schedule meeting with PI 90 days prior to completion of award:**

Expenses

Review expenditures for allowability.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Confirm all effort is appropriate and certified.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Identify all outstanding invoices.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Confirm all expenses have posted.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Verify that all encumbrances have cleared.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Ensure all journal entries have been completed and processed.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Sub-recipients' final invoices have been paid.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A

Record Changes

Close or change Purchase Orders.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Inform HR of account termination, change PAF.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Update budget status to "closed."	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Remove budget from Pcard accounting code options.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Log file as closed in Record Retention File.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Update Active CAS Grants file to closed status.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A

Reporting

All Technical Reporting Requirements have been met (PI).	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
All Financial Reporting Requirements have been met (BO).	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Ensure Cost-sharing commitments are met.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A

Closeout prepared by:

Date:
