This guide will demonstrate the steps involved in the project award closure process for all eRA Project award records.

eRA Roles involved in this process

- o Postawards Research Admin
- o Postawards Faculty Finance
- o RC&I Contracts Manager
- o Researcher/PI/Delegate

Initiating project award closure

Note: The Project award closure process is initiated by the **Postawards Research Admin** role.

1. Login to eRA, then switch roles **to Postawards Research Admin** and ensure that the project record is on the *Project in Progress* stage.

2. Open the record by clicking *Edit/Open*.
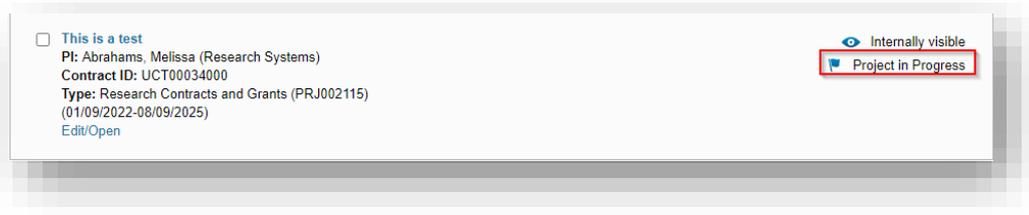
3. Click Save & close at the bottom of the screen.
   - o From the options on the popup, select *Project Award Closure Review Initiated* and click *Done*.
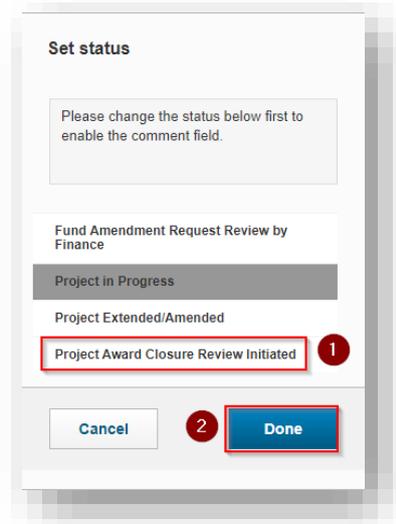

More information on eRA is available via the Research Support Hub.
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If you require assistance or additional support, please log a call via ServiceNow.

Retaining the Postawards Research Admin role, on the selected project record, navigate to the *Project Award Closure Information* tab by clicking on *More.* Then, attach/upload proof of final reporting and other deliverable in the field provided.


Click *Save & close*, and from the popup box, select *Project Award Closure Review by Finance*. Then click *Done.*
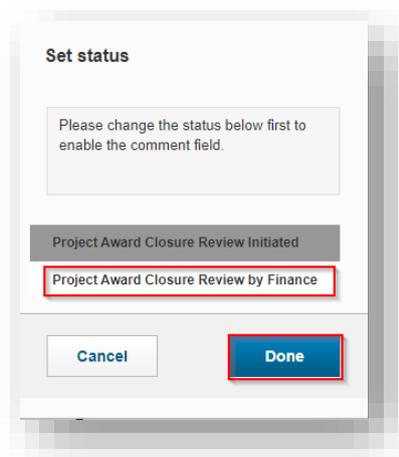
Moving the form will trigger a notification to all tagged Faculty Finance colleagues who have access to the record.

1. **Review of project closure by Finance**

The Postawards Faculty Finance role will be prompted to review the project record for possible closure. To facilitate this, this role will login, switch roles to Postawards Faculty Finance and find the respective project record either from their *Things to do* items under *Project Award Closure Review required by Faculty Finance* or using *Award Management > Project Awards* from the left navigation.
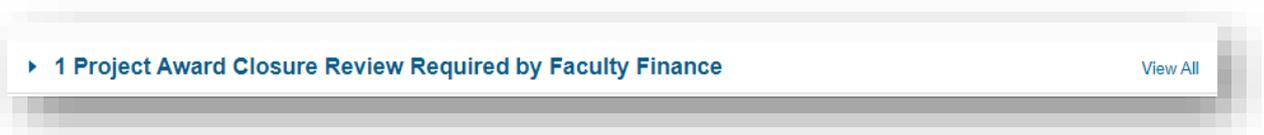
Navigate to the *Project Award Closure Information* tab by clicking on *More.* Here, you will complete the Project Award Closure Checklist which closely emulates the fields on the FM007 form, by ticking the applicable radio buttons for each of the 16 questions.

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This is followed by the declaration to confirm that all items have been checked and the record is ready for closure review by the PI.

Click *Save & close*, and from the popup box, select the applicable option:
Project Award Closure Review by RC&I when ready to proceed to the next stage of review*, or*
Project Award Closure Review Initiated if clarity is needed by the Research Admin. Then click *Done.*

This will trigger a notification to the Research Admin or the RC&I Contracts Manager, depending on who has received the form.

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## 2. Review of Project Closure by RC&I Contracts Manager

The RC&I Contracts Manager role will be prompted to review the project record for closure. To facilitate this, this role will login, switch roles to RC&I Contracts Manager and find the respective project record either from their *Things to do* items under *Project Award Closure Review required by RC&I* or using *Award Management > Project Awards* from the left navigation.

Navigate to the *Project Award Closure Information* tab by clicking on *More.* Here, this role will check the information captured by the previous roles and check the contract to ensure that all project deliverables have been met.

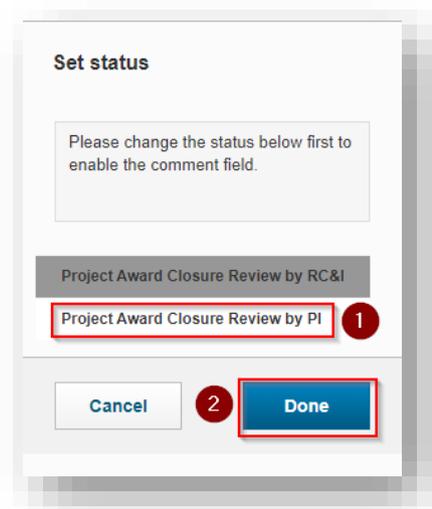Then, the declaration by the RC&I Contracts Manager will be completed.
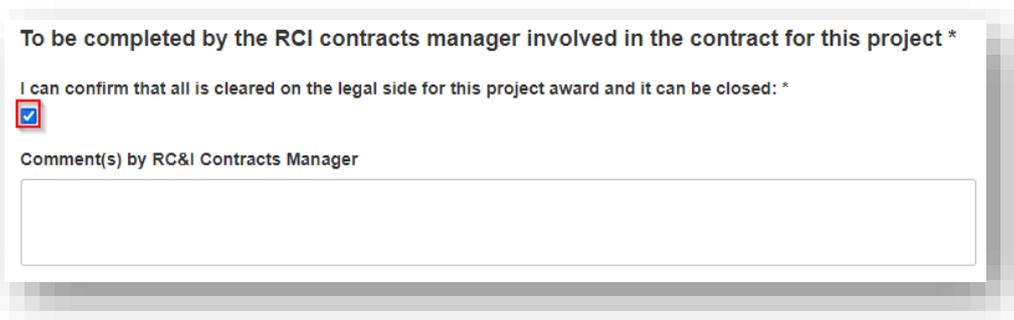
Then, click *Save & close* at the bottom of the screen. From the options on the popup, select *Project Award Closure Review by PI* and click *Done*.

This will trigger a notification to the PI/delegate, alerting them to action project closure on the system

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3. Project closure by PI/Delegate

The PI and/or delegate will be prompted to review the project record for final closure. To facilitate this, this role will login and find the respective project record either from their *Things to do* items under *Project Award Closure Review required by PI* or using *Award Management > Project Awards* from the left navigation.

▶ **1 Project Award Closure Review Required by PI**   View All

Navigate to the *Project Award Closure Information* tab by clicking on *More.* Here, the PI or delegate will check the information captured by the previous roles and ensure that all the relevant project information has been captured correctly.

Then, the declaration by the PI will be completed.

To be completed by the PI *

I have checked the items above and authorise that this project award record can be closed. *
☑

Project Award Closure Comment by PI

Click *Save & close*, and from the popup box, select the applicable option:

Project Award Closure *Initiated*, to send the form back to the Research Admin for clarity, **or**

Project Award Closure Review by Finance, to send the form back to Faculty Finance to check and clarify information captured by them, **or**

Project Award Closed if all has been cleared on the project end, and the project can be concluded.

Then click *Done.*

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