

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

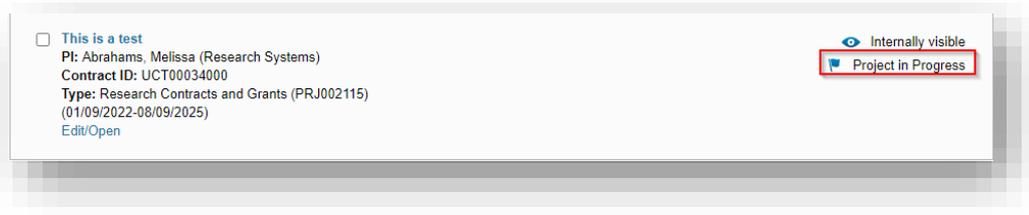
## eRA Roles involved in this process

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

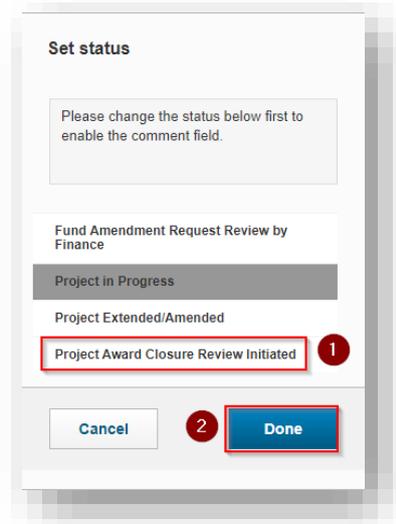
## Initiating project award closure

**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.
  - From the options on the popup, select *Project Award Closure Review Initiated* and click *Done*.

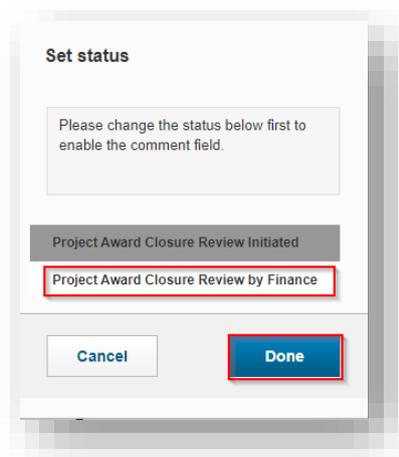


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Retaining the Postawards Research Admin role, on the selected project record, navigate to the *Project Award Closure Information* tab by clicking on *More*. Then, attach/upload proof of final reporting and other deliverable in the field provided.



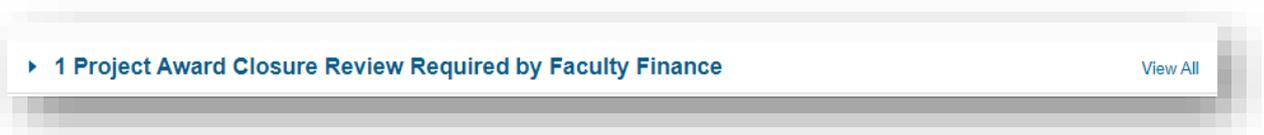
Click *Save & close*, and from the popup box, select *Project Award Closure Review by Finance*. Then click *Done*.



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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**Project Award Closure Checklist:**  
 Please complete the checklist below to confirm completion of items applicable to the closure of this project award (or select not applicable).

1. Purchase Orders/Requisitions - There are no outstanding commitments on this fund \*  
 Yes  Not applicable
2. Budget - The actual balance/budget variance on this fund is ZERO \*  
 Yes  Not applicable
3. Revenue (for research contracts) - All revenue in respect of research agreement invoiced and received by the fund \*  
 Yes  Not applicable
4. Sales Orders - All Sales Order line items on the Delivery Due List are cleared and all invoices on the fund are paid \*  
 Yes  Not applicable
5. Bridging Finance - All bridging finance has been returned \*  
 Yes  Not applicable
6. Floats, Advances, Petty Cash - All floats, including petty cash, and advances have been cleared \*  
 Yes  Not applicable
7. Claims (e.g. mileage, reimbursements) - All claims have been processed against this fund \*  
 Yes  Not applicable
8. Salaries payments - All regular monthly salaries have been processed to this fund \*  
 Yes  Not applicable
9. Salary funds - All people employed against this fund have been moved, and HR has processed all these changes \*  
 Yes  Not applicable

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.

**To be completed by the respective Finance Contact \***

I have checked the items above and can confirm that this project award record is ready for closure review/approval by the PI. \*

Project Award Closure Comment by Finance

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*.

**Set status**

Please change the status below first to enable the comment field.

Project Award Closure Review Initiated

**Project Award Closure Review by Finance**

Project Award Closure Review by RC&I

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

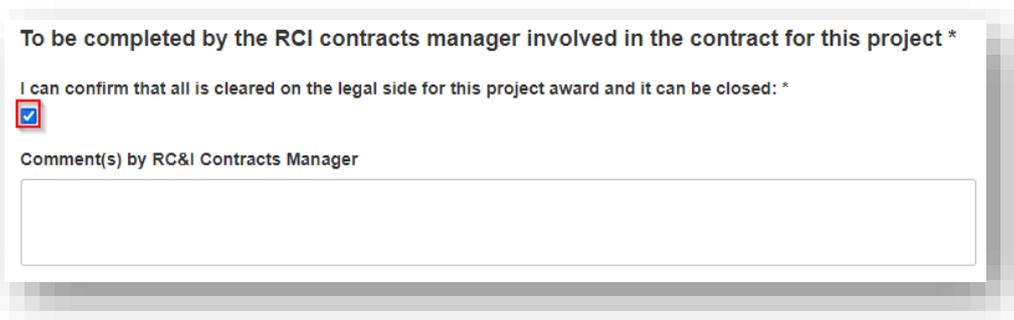
The RC&I Contracts Manager role will be prompted to review the project record for closure. To facilitate this, this role will login, switch roles to RC&I Contracts Manager and find the respective project record either from their *Things to do* items under *Project Award Closure Review required by RC&I*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

### ▶ 3 Project Award Closure Review Required by RC&I

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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.



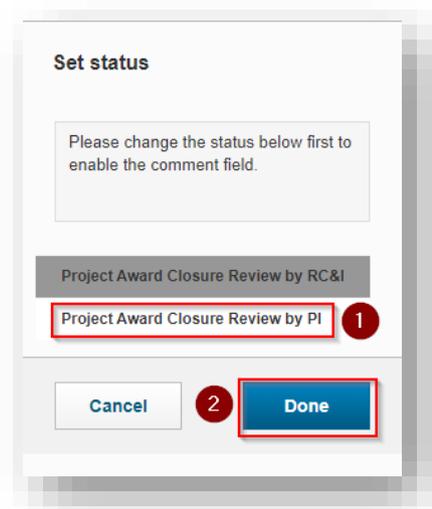
To be completed by the RCI contracts manager involved in the contract for this project \*

I can confirm that all is cleared on the legal side for this project award and it can be closed: \*

Comment(s) by RC&I Contracts Manager

[Empty text box]

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*.



**Set status**

Please change the status below first to enable the comment field.

Project Award Closure Review by RC&I

Project Award Closure Review by PI 1

Cancel 2 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

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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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