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CU I&E Submission: CU Denver | CU Anschutz Project Closeout Automation [1]

Category

Sponsored Projects/Research

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Project Description

Project Closeout Automation streamlines sponsored?project closeouts at CU Denver | Anschutz by replacing manual, one?at?a?time work with a nightly, rules?based process in PeopleSoft. The solution evaluates UCD projects 150+ days past end date against standardized financial and administrative criteria; when a project is “clean,” it automatically inactivates speedtypes, closes the project, and completes downstream actions (closing/canceling billing and revenue plans, canceling pending amendments, closing contracts and awards, and completing milestones). A robust log table and PS Query provide auditability and campus visibility; if a manual checklist was in progress, the process sends a consolidated notification and removes the redundant activity guide. The result: backlog reduction, faster close cycles, and redeployed effort so ~20 post?award staff focus on exceptions. Built for scale and campus adoption, the process runs nightly, requires no sensitive data, and strengthens compliance and fiscal stewardship.

Project Efficiency

The greatest innovation is a nightly, rules?based auto?close that evaluates sponsored projects and, when no issues remain, closes them end?to?end without staff touch. By letting the system finish projects that need no additional work, post?award teams reclaim time to focus on exceptions and sponsor service rather than repeating routine steps. It’s a new use of our Grants modules—moving from passive reporting to active decisioning and

action—complete with audit logs and automatic re?evaluation, which steadily reduces backlog and accelerates compliant closeouts.

Project Inspiration

The idea emerged during recurring “mass closeout” sessions. CU Denver | Anschutz sent our team large lists of projects pre?screened as ready; we then executed every closeout step in batches. While faster than one?by?one work, it still required substantial time to re?verify projects and run updates. In one session we asked: could the system evaluate each project and complete the closeout steps for us? That question became a rules?based, nightly automation that determines eligibility and closes clean projects end?to?end—freeing post?award staff to focus on exceptions rather than repetitive tasks.

What Makes You Happiest about this Project?

Seeing people, process, and technology come together seamlessly was the best part. The nightly auto?close immediately reduced the CU Denver | Anschutz closeout backlog and, just as important, surfaced clear reasons when projects failed evaluation—giving post?award staff a head start on fixes and faster manual closes. I’m proud of how quickly we delivered impact: from idea to production in just a few months. Most satisfying of all, the solution quietly runs every night, freeing the team to focus on complex work while the system handles the easily repeatable steps.

Links
[1] https://www.cu.edu/controller/i-e-awards/current-submissions/cu-ie-submission-cu-denver-cu-anschutz-project-closeout [2] mailto:samantha.burkhalter@cu.edu [3] mailto:ty.barwick@cu.edu
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