

## **CU I&E Submission: CU Denver | CU Anschutz Project Closeout Automation** <sup>[1]</sup>

### **Category**

Sponsored Projects/Research

### **Submitted By**

Samantha Fildish, [samantha.burkhalter@cu.edu](mailto:samantha.burkhalter@cu.edu) <sup>[2]</sup>, Principal Solutions Manager

### **Project Team**

Samantha Fildish, [samantha.burkhalter@cu.edu](mailto:samantha.burkhalter@cu.edu) <sup>[2]</sup>, Principal Solutions Manager  
Ty Barwick, [ty.barwick@cu.edu](mailto:ty.barwick@cu.edu) <sup>[3]</sup>, Sr Enterprise Application Dev  
Ivan Ramirez, [ivan.l.ramirez@ucdenver.edu](mailto:ivan.l.ramirez@ucdenver.edu) <sup>[4]</sup>, Student Asst IV  
Brittany Vits, [brittany.vits@cuanschutz.edu](mailto:brittany.vits@cuanschutz.edu) <sup>[5]</sup>, Postaward Manager

### **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.

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[4] <mailto:ivan.l.ramirez@ucdenver.edu> [5] <mailto:brittany.vits@cuanschutz.edu>