Appendix J: *Project Closing Checklist*

The following checklist is to be used by *Project Managers* when closing a project in *Clarity*. Refer to the appropriate section of the *Project Management (PM) Handbook* for *Project Closing* details. The checklist can be created from the *Project Closing Checklist* template and saving it as a separate document.

Done (✓)	***Step***	***Project Planning Task***	***Refer to:***
	1	Review *PM* handbook, *Section 9: Closing Projects.*	*Section 9: Closing Projects*
	2	Update the project *Return on Investment (ROI) Analysis* (if applicable).	*Section 9: Closing Projects, ROI Analysis*
	3	Obtain *Project Sponsor* signoff on the Scope & Approach and return to the *IT Administration Office*.	*Section 9: Closing Projects, Scope & Approach Signoff*
	4	Verify all *Issues* have been closed and *Change Requests* completed in *Clarity*.	*Section 9: Closing Projects, Close Issues and Complete Change Requests*
	5	From *Open Workbench*, *Closed Projects* folder, *Closed Project Review* view, change all task estimates (ETC) to blank by entering a zero. Complete all tasks and milestones and ensure task *End Date* is prior or equal to today's date. Note: Enter a zero where a zero is present to create a blank in the estimate (ETC).	*Section 9: Closing Projects, Closing a Project in Open Workbench*
	6	From *Open Workbench*, *Closed Projects* folder, *Variance Explanation Detail Plan* view, enter a Variance Explanation for projects that show a variance of +/- 20%.	*Section 9: Closing Projects, Closing a Project in Open Workbench*
	7	From *Open Workbench*, *Closed Projects* folder, *PM Metrics Unbaselined Tasks w/ no Category* view, verify that all unbaselined tasks have a Category code (see Appendix C: Task Category Field Standards). Contact a member of the PMO team for any questions relating to activity/task categories.	*Section 9: Closing Projects, Closing a Project in Clarity Open Workbench* *Appendix C: Task Category Field Standards*
	8	From *Open Workbench*, *Closed Projects* folder, *PM Metrics Task IDs* view, verify the following: Project Management tasks have IDs beginning with 0001* *Initial Planning* task ID is 000110 *Vendor Management* ID is 000125 *Source System Consulting* task ID is 000310 *Contingency* tasks IDs are **997	*Section 9: Closing Projects, Closing a Project in Open Workbench*
	9	Submit an email to the *Project Management Office (PMO)* to close the project in Clarity.	*Section 9: Closing Projects, Request PMO to Close the Project*