PM (or staff designated by PM) should complete the Project Closeout Sheet when the project is completed and set up a meeting with Accounting to submit the completed Project Closeout Sheet and complete the closeout process. The completed Project Closeout Sheet should be stored in the project directory under /Admin/Closeout/.

Below is a summary of items listed on the Project Closeout Sheet that the PM is responsible for ensuring are completed:

* Populate Closeout Sheet
* Consult project contract and project management plan (PMP) to finalize closeout requirements
* Project Closeout Meeting held, attendees documented
* Lessons Learned, verify documented at Initial Internal Closeout Meeting
* Confirm client has signed-off on all deliverables
* Marketing:
  + Update project description in Vision and obtain review/approval from Marketing
  + Thank You Letter(s) sent, recipient(s) and address(es) denoted in Vision
  + Letter of recommendation requested
* Accounting:
  + Final invoice and progress report submitted, prior to Project Closeout Meeting. PM should follow-up with client (as needed) until final payment is received
  + Make project dormant when closeout is complete
* Archiving:
  + Files and folders have been cleaned-up and organized
  + Final deliverables saved in read only format, links/location indicated on Closeout Sheet
  + Documents and Data Archived, location indicated
  + Communications archived, location indicated
* Update Vision Project Module:
  + Project description marked as completed on background tab of Vision Project Module
  + Project Reference saved as contact and linked as reference in contacts tab of Vision Project Module
  + Applicable Key Words added to Background tab of Vision Project Module
  + Employee Roles and a Role Description indicated on Team tab of Vision Project Module
  + Physical Archives, location denoted in Vision