



SOP-11 | Project Closeout

Standard Operating Procedure

Document	SOP-11
Status	Draft for internal approval
Version	0.1
Effective date	Upon approval
Owner	BEER Lab Manager
Review cycle	At least annually
Applies to	Projects and personnel within the scope of this SOP

Behavioral & Experimental Economics Research Lab · Tecnológico de Monterrey

1. Purpose

Ensure that a project is administratively, financially, operationally, and data-wise complete before BEER marks it Closed.

2. Closeout trigger

Closeout begins when the PI confirms that no further recruitment or participant-facing data collection is planned under the current protocol.

3. Closeout checklist

1. Close all active recruitment and session sign-ups.
2. Complete attendance and no-show records.
3. Confirm all participant compensation and resolve failed payments.
4. Reconcile cash or electronic-payment records.
5. Return BEER equipment and close temporary access accounts.
6. Confirm that field devices have synchronized approved data and no unnecessary PII remains locally.
7. Archive final instruments, consent version, protocol, experiment code/build identifier, randomization code, raw data location, and deviation log.
8. Resolve or transfer open incidents to the appropriate institutional process.
9. Update experiment-class and participation-history records for BEER pool participants.
10. Confirm PII retention/deletion plan and access rights.

11. Record publications/preregistration/registry identifiers when available.
12. Submit the BEER acknowledgment wording for future outputs.

4. Operational archive

BEER's closeout archive is not a substitute for the PI's scientific archive. BEER may retain operational metadata, approved versions, recruitment/attendance history, and documentation needed for compliance, while research datasets remain under the project's approved custody.

5. Reopening

A Closed project that wishes to collect additional participants must be reopened or registered as a new phase. Material protocol changes may require a new BEER Project ID.

6. Related documents

- SOP-01 Project Registration and Approval
- SOP-09 Data Protection and Participant IDs
- SOP-10 Incident Reporting
- Experiment Classification Taxonomy