

How to Close a Grant and Project Workspace

The below sections go over how to initiate a grant closeout period, as well as officially close out the grant once all transactions and reporting have been completed.

Do NOT delete a grant, rather than closing it out. Deleting a grant creates issues with the RIFANS/eCivis integration. Deleting a grant also deletes the RIGID, causing any transactions associated with that grant to go into an "unmatched" stage and you lose the ability to view them.

Below you can navigate to each section:

How to close a grant How to access closed grants How to close a project How to access closed projects



Closing a Grant

There are 2 ways to initiate grant closeout, either from the Available Actions list, or from your assigned tasks.

In your Project Dashboard, when you have completed all of your approval tasks for implementation, there will be an option called "I am ready to initiate grant closeout"

Project Dashboard: Health Project

Department: Department of Administration

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts					
Active Grants FD18395 Scho	🔍 🔞 pol Safety Grant - FY	2021								
Stage: App. S	ubmitted	Projected: \$1,000),000.00	Match: \$50,	000.00					
FD1004 Hearst Foundations: Health - FY 2021										
Stage: Grant A	Awarded	Awarded: \$1,000,	000.00 *	Match: \$0.0	ch: \$0.00					
Available Actio	ns									
O Iwou O Iwou O Iamr O Thisg	 I would like to access details of this grant I would like to request an account setup I am ready to schedule my report This grant does not require a report 									
◯ lam r	O I am ready to initiate grant closeout									
 I would like to view/manage my contract & account details I would like to create/manage goals and metrics for this grant I would like to create/manage a budget for this grant 										
			*These fund	ds have been made	available for allocation.					

You can also access this option by completing the "Contract Close" task. This task is automatically created when you are awarded and input the contract end date. Once identifying the correct task for the applicable grant, click "Done"

Pending Tasks	Completed Tasks	Approval History						
Task Na	me	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Contrac	t Close	US6573B: FY2022	Grant Awarded	K. Benoit	04/22/2022			
O Add Task	Task Report	Refresh						

Whichever option you choose, the Grant Closeout status form will open.



Here you can add any important notes and files about your closeout initiation. Hit Save.

Somplete Statu	
Grant:	FD1004 Hearst Foundations: Health - FY 2021
∽ Notes:	500 Characters Left
Jpload Files	

Once saved, you will see your grant stage has moved from *Implementation* to *Grant Closeout*. Transactions will still flow to your grant that is in *Grant Closeout* stage as you continue to liquidate your funds and complete all necessary reporting.

Once you have completed all closeout tasks and reporting and you are ready to officially close your grant, from the Project Dashboard select "I am ready to close this grant"

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts 8							
Active Grants	Active Grants 🔍 🔞 <u>US5125 Species Recovery Grants to States (Section 6 Program) - FY 2022</u> Stage: Grant Closeout Awarded: \$1,000,000,000 Match: \$100,000,00											
Stage: Grant C	Stage: Grant Closeout Awarded: \$1,000,000.00 Match: \$100,000.00											
Available Action	ns											
O I woul O I woul O I want O I am r	 I would like to access details of this grant I would like to request an account setup I want to update my scheduled reports I am ready to close this grant 											
O I woul O I woul	Id like to create/manage	ge goals and metrics for the grant	his grant									



This selection will open a Grant Close Form for you to complete. You will need to enter the date the grant closed, who on the Project Team is closing the grant, select a closure type from the drop-down list, and include any notes. In the Files section upload the closeout letter from your grantor. Once all files have been uploaded and the necessary information inputted, hit Save.

Grant Status - Close Grant

Scenario 1 - Parent without children, match at parent

Complete Status	Form	
Grant:	US5125 Species Recovery Grants to States (Section 6 Program) - FY 2022	
Closed Date *:		
Closed By *:	Katje Benoit	
Closure Type *:	Please select a closure type	
🖵 Notes:		
	500 Characters Left	

Upload Files	
Attach Files:	
Save) Cancel)	



Accessing Closed Grants

Once saved, you will be brought to the Project History page. Here you can see all grants that have been closed as well as the associated Notes with each grant. Once a grant is closed, a user cannot reopen the grant. If it needs to be re-opened for any reason, click on the Closed button to get contact information for eCivis Support Team, who can re-open the grant for you.

Project History

Scenario 1 - Parent without children, match at parent

Project Details	Grants Awarded						
Department: Department of Administration	US5125 Species Recov	ery Grants to States (Section	<u>6 Program) - FY 2022</u>	2			
Project Lead: K. Benoit	Status	Award	Awarded	Match	Туре	Notes	
Project Type: Non-Construction		10/00/0001	\$1 000 000 00	¢100.000.00	Or shills Kind		
Created: 10/25/2021 By: K. Benoit	Closed	10/02/2021	\$1,000,000.00	\$100,000.00	Cash/In-Kind		
Summary: Scenario 1 - For Parent (without children); Match at Parent Level	Grants Not Awarde	ed					
Activity Summary							
Grants Assigned	Grants Not Pursued						
1	There are no inactive grants matching this criteria.						
Applications 0 Due 0 Submitted							
Funding 1 Awarded 0 Allocated							
Reports 0 Due 0 Submitted							

This can also always be accessed by clicking on the History tab in the Project Dashboard.

Project Dashboard: Grant Project FY2022

Department: Department of Administration Project Period: 12/01/2021 - 04/30/2022

						Data Integra	tion Options	Project Options
Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History	
Active Grants	Q					Project Team 🥜	0	



Closing a Project

Once the grant is closed, it will be removed from the project workspace. Either a new grant can be added to the Project Workspace, or it can be closed.

To search and find a new grant to attach to the Project Dashboard, hit the magnifying glass icon. This will bring you to the Search for Grants page. For more detailed instructions on searching for grants, please reference the *How to Search for a Grant in eCivis* user guide.

Project Dashboard: Health Grant 2022

Department: De	partment of Admini	istration						
						Data Integrati	ion Options	Project Options
Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History	
Active Grans All grants and In order to rec (877) 232-484	opie ed with this pro open a closed grant, j 47 ext. 2.	ject have been moved to please contact your Clie	o the Project History page nt Services Associate at:			Project Team 🖉 (<u>K. Benoit (Lead</u>)	٩	Grant Manageme

If you no longer wish to use this Project Dashboard, you can close the project. To do so, hit Project Options and Close Project.

Project Dashboard: Health Grant 2022

Department: Department of Administration

	Data Integration Options								
Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History		
Active Grants All grants ass In order to reo (877) 232-484	eciated with this proj pen a closed grant, p 7 ext. 2.	ject have been moved to lease contact your Clier) the Project History page nt Services Associate at:			Project Team 🥔 <u>K. Benoit</u> (<u>Lead</u>)	3	Grant Manageme	





You will need to confirm that you wish to close the Project Dashboard by clicking Yes.



This will close the Project Dashboard and it will no longer be able to be used.

Once a project is closed, a user cannot reopen the grant. If it needs to be re-opened for any reason, the user will need to reach out to click on the Closed button to get contact information for eCivis Support Team, who can re-open the grant for you.



Accessing Closed Projects

To view closed projects, under the Reports tab, select Activity Reports and Closed Projects

ne	COVID-19	Grant	Management	Research		Insight	Reports	Administrati
	Trackir Manage	ng & l Grant	Reporting		•	Report Builde My Saved Rep Activity Repor	orts ts	nd More
lications	Fun	Iding	Anns Submitted Closed Projects Grants Awarded Grant Closeout]	•	Audit Reports Funding Repo Goals & Metri	rts cs Report	F
Integ	<u>34</u>	alucu	1			Grant Conflict Tasks Report Assessment (Report Dashboard	7 days. rograms ble
lications	Fur	iding	View Departmer Post Av	nt Dashboard » vard		Research Acti Grant Review	vity Report	rogram
mitted	Aw	arded	Reports	Due		My Gr	ant Activity	

Use the Report Start and End date to select the timeframe, and select the department you wish to view closed projects for. To select multiple, hold down the CTRL key while selecting your departments. Then click Generate Report.

Activity Report - Closed Projects

Information based on all projects <u>closed</u> during the reporting period:									
Enter Criteria and Ge	nerate Report								
Report Start Date:	04/23/2021		End Date:	04/22/2022					
Select Departments: (CTRL + Click for multiple)	All Departments AEC - Atomic Energy Commission AG - Criminal ARTS - Council on the Arts BHDDH - Behavioral Healthcare		-						
Generate Report									

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Last Updated 4/22/2022



In this report, you can view details of each closed Project, including which grants were associated with it, who was the Project Lead, the date is was closed, and other award details.

Department of Administration - 2 projects								
Project: Health Grant 2022	Project Lead:		Close					
Grant	Stage	Awarded	Award	Cash	In-Kind			
US5125 Species Recovery Grants to States (Section 6 Program) - FY 2022	Grant Closed	10/02/2021	\$1,000,000.00	\$50,000.00	\$50,000.00			

Clicking on the hyperlinked project name allows you to enter the closed Project Workspace to view any documentation, task history, goals & metrics, etc. To re-open the project, you must contact eCivis to have them open it for you.

Project Dashboard: Health Grant 2022

Department: Department of Administration

						Data Integration Options		Project Options				
Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History					
Active Grants This project ha please contac	Weight Stress of the second	Project Team <u>K. Benoit</u> (<u>Lead</u>)		Grant Manageme								
Pending Task	cs Complete	d Tasks Appro	val History									
This project has been closed. In order to reopen a project, please contact your Client Services Associate at: (877) 232-4847 ext. 2.												