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:

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 School Safety Grant - FY 2021

Stage: App. Submitted   **Projected:** $1,000,000.00   **Match:** $50,000.00

FD1004 Hearst Foundations: Health - FY 2021

Stage: Grant Awarded   **Awarded:** $1,000,000.00 *   **Match:** $0.00

Available Actions
- ○ 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
- ○ I have received a grant adjustment notice and need to amend my grant agreement
- ○ 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 funds 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 Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Contract Close	US6573B: FY2022	Grant Awarded	K. Benoit	04/22/2022		🖼	☐

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.

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"

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

Department:	Department of Administration
Project Lead:	K. Benoit
Project Type:	Non-Construction
Created:	10/25/2021 By: K. Benoit

Summary:
Scenario 1 - For Parent (without children); Match at Parent Level

Grants Awarded

US5125 Species Recovery Grants to States (Section 6 Program) - FY 2022

Status	Award	Awarded	Match	Type	Notes
Closed	10/02/2021	$1,000,000.00	$100,000.00	Cash/In-Kind	

Grants Not Awarded

There are no inactive grants matching this criteria.

Activity Summary

Grants Assigned
1

Applications
0 | Due
0 | Submitted

Funding
1 | Awarded
0 | Allocated

Reports
0 | Due
0 | Submitted

Grants Not Pursued

There are no inactive grants matching this criteria.

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 Integration Options   Project Options

| Overview | Documents | Grant Lifecycle | Goals & Metrics | Budgets | Contracts & Accounts | Spending | History |

Active Grants 🔍 ⓘ   Project Team ✏️ ➕

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.

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

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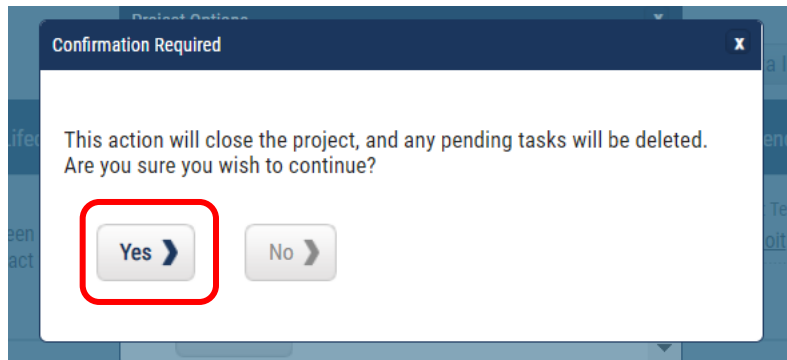

This will close the Project Dashboard and it will no longer be able to be used.

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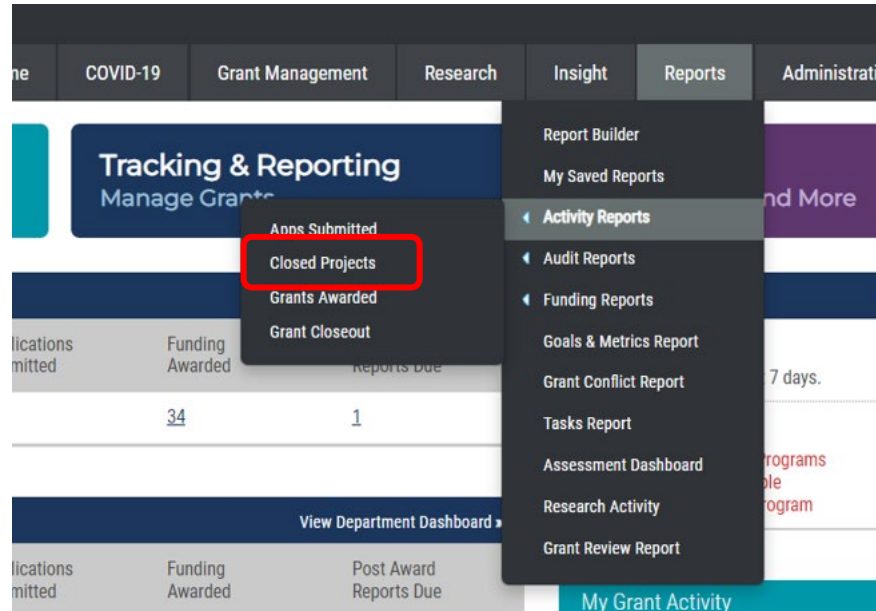
Use the Report Start and End date to select the timeframe, and select the department you wish to view closed projects for. To select multiple, hold down the CTRL key while selecting your departments. Then click Generate Report.

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						⊟ Minimize
Project: Health Grant 2022		**Project Lead:** Katje Benoit		**Closed:** 04/18/2022		
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 has been closed. In order to reopen a project, please contact your Client Services Associate at: (877) 232-4847 ext. 2.

Project Team
K. Benoit (Lead)   Grant Manageme...

Pending Tasks	Completed Tasks	Approval History

This project has been closed. In order to reopen a project, please contact your Client Services Associate at: (877) 232-4847 ext. 2.