

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,	\$50,000.00					
FD1004 Hearst Foundations: Health - FY 2021										
Stage: Grant A	Awarded	Awarded: \$1,000,	,000.00 *	Match: \$0.0	0					
Available Actio	ns									
◯ Iwou ◯ Iam r ◯ 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 Lhowe received a grant adjustment notice and need to amend my grant agreement 									
🔿 lam r	ready to initiate grant o	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 Na	me	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Contract	Contract Close		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.

Complete 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	Aetrics Budgets Contra					
Active Grants (US5125 Specie	•	to States (Section 6 Prog	<u>gram) - FY 2022</u>						
Stage: Grant Closeout Awarded: \$1,000,000.00 Match: \$100,000.00									
Available Action	าร								
O I woul	d like to access detail d like to request an ac to update my schedu eady to close this grai	ccount setup led reports							
_	5	e my contract & account de ge goals and metrics for tl							
-		ge a budget for this grant	ino grafit						



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

Grant:	US5125 Species Recovery Grants to	States (Section 6 Program	
Closed Date *:			
Closed By *:	Katje Benoit	~	
Closure Type *:	Please select a closure type	~	
🖵 Notes:			

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 Detai	ils	Grants Awarded	Grants Awarded								
Department:	Department of Administration	US5125 Species Recov	very Grants to States (Section	<u>6 Program) - FY 2023</u>	2						
Project Lead:	K. Benoit	Status	Award	Awarded	Match	Туре	Notes				
Project Type:	Non-Construction		10/02/2021	\$1,000,000.00	\$100,000.00	Cash/In-Kind					
Created:	10/25/2021 By: K. Benoit	Closed	10/02/2021	\$1,000,000.00	\$100,000.00	Gasii/III-Nillu					
Summary: Scenario 1 - Fo Parent Level	r Parent (without children); Match at	Grants Not Award	ed								
		There are no inactive g	rants matching this criteria.								
Activity Sum	mary										
Grants Assigne	ed	Grants Not Pursued									
1		There are no inactive grants matching this criteria.									
Applications 0 Due 0 Subn	nitted										
Funding	ded										
1 Awar 0 Alloc	ated										

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 0					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

oartment: De	partment of Admin	istration				Data Integrat	ion Options	Project Options
Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History	
Active Grans All grants coordined with this project have been moved to the Project History page. In order to reopen a closed grant, please contact your Client Services Associate at:							0	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		
	ociated with this proj pen a closed grant, p		o 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 I	Management	Research		Insight	Reports	Administrati
	Trackir Manage	Grant			•	Report Builder My Saved Rep Activity Repor	orts	nd More
lications		ding	Apps Submitted Closed Projects Grants Awarded Grant Closeout		•	Audit Reports Funding Repo Goals & Metri	rts	F
mitted	4wa <u>34</u>	arded	1	soue		Grant Conflict Tasks Report Assessment D		7 days. Trograms
lications		ding	View Departmen Post Av	ward		Research Acti Grant Review		rogram
mitted	Awa	rded	Reports	s 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 p	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				

Page **8** of **9**

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					🛢 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 Image: Construct on the project of the project of the project of the 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 Task	s Complete	ed Tasks Approv	al History							
This project h	as been closed. In o	rder to reopen a project	please contact your Cli	ent Services Asso	ciate at: (877) 232-4847 ext. 2					