



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; instead, close 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 in eCivis.

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Closing a Grant



Before closing your grant, ensure that the *Contract Close Date* is accurate and does not extend past the date you close the grant. *Contract Close Date* is sent to RIFANS and will ensure that your RIGID will stop appearing in RIFANS once your award has ended. For instructions on how to view and edit your *Contract Close Date*, see [Appendix A](#).

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  					
<u>FD18395 School Safety Grant - FY 2021</u>					
Stage: App. Submitted		Projected: \$1,000,000.00	Match: \$50,000.00		
<hr/>					
<u>FD1004 Hearst Foundations: Health - FY 2021</u>					
Stage: Grant Awarded		Awarded: \$1,000,000.00 *	Match: \$0.00		
<hr/>					
Available Actions					
<input type="radio"/> I would like to access details of this grant					
<input type="radio"/> I would like to request an account setup					
<input type="radio"/> I am ready to schedule my report					
<input type="radio"/> This grant does not require a report					
<input type="radio"/> I have received a grant adjustment notice and need to amend my grant agreement					
<input type="radio"/> I am ready to initiate grant closeout					
<input type="radio"/> I would like to view/manage my contract & account details					
<input type="radio"/> I would like to create/manage goals and metrics for this grant					
<input type="radio"/> I would like to create/manage a budget for this grant					
<p style="text-align: right;">*These funds have been made available for allocation.</p>					



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			<input type="checkbox"/>

[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.

Grant Status - Closeout

Health Project

Complete Status Form

Grant: FD1004 Hearst Foundations: Health - FY 2021

Notes:

500 Characters Left

Upload Files


Attach Files:

[Save >](#) [Cancel >](#)

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 &
Active Grants  					
US5125 Species Recovery Grants to States (Section 6 Program) - FY 2022					
Stage: Grant Closeout		Awarded: \$1,000,000.00		Match: \$100,000.00	
Available Actions					
<input type="radio"/> I would like to access details of this grant					
<input type="radio"/> I would like to request an account setup					
<input type="radio"/> I want to update my scheduled reports					
<input checked="" type="radio"/> I am ready to close this grant					
<input type="radio"/> I would like to view/manage my contract & account details					
<input type="radio"/> I would like to create/manage goals and metrics for this grant					
<input type="radio"/> I would like to create/manage a budget for 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 *: 

Closure Type *: 

Notes:
500 Characters Left

Upload Files

Attach Files: 



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

Activity Summary	
Grants Assigned	1
Applications	0 Due 0 Submitted
Funding	1 Awarded 0 Allocated
Reports	0 Due 0 Submitted

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.	

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
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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.

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  All grants associated 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: (877) 232-4847 ext. 2.				Project Team   K. Benoit (Lead) Grant Managem...			

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 **Project Options**

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History
Active Grants  All grants associated 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: (877) 232-4847 ext. 2.				Project Team   K. Benoit (Lead) Grant Managem...			

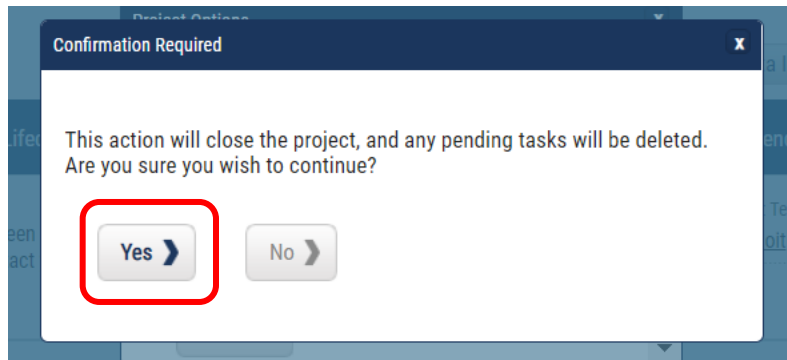
Project Options

- Edit Project
- Close Project
- Delete Grant
- Delete Project

Close >



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



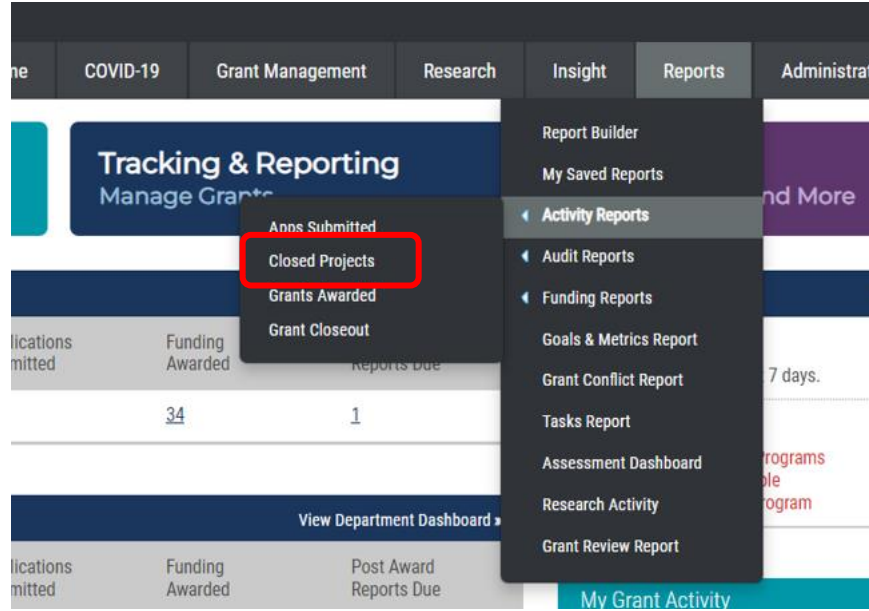
This will close the Project Dashboard and it will no longer be able to be used.

Once a project is closed, a user cannot reopen the grant. If it needs to be re-opened for any reason, please use the [GMS User Support Form](#).



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.

Activity Report - Closed Projects

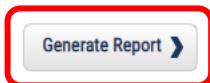
Information based on all projects closed during the reporting period:

Enter Criteria and Generate Report

Report Start Date:  End Date: 

Select Departments: (CTRL + Click for multiple)

- AEC - Atomic Energy Commission
- AG - Criminal
- ARTS - Council on the Arts
- BHDDH - Behavioral Healthcare





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 it 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, please submit a request through the [GMS User Support Form](#).

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
<p>Active Grants ?</p> <p>This project has been closed. In order to reopen a project, please contact your Client Services Associate at: (877) 232-4847 ext. 2.</p>				<p>Project Team</p> <p>K. Benoit (Lead) Grant Managem...</p>			

Pending Tasks	Completed Tasks	Approval History
<p>This project has been closed. In order to reopen a project, please contact your Client Services Associate at: (877) 232-4847 ext. 2.</p>		



Appendix A: Viewing and Editing the Grant Contract Close Date

To navigate to the *Contract Close Date* field for a grant, click on the *Grant Lifecycle* tab in the Project Dashboard

Project Dashboard: Food Safety Grant

Department: Department of Administration

Project Period: 11/01/2022 - 11/30/2025

Data Integration Options Project Options

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

Active Grants

ORG0038 Food Safety 2022

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

Project Team

K. Benoit (Lead) Grant Manageme...

K. Benoit DEPT Department User

Available Actions

- 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
- 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 pass-through funding.

Click the yellow edit pencil icon for the Grant Awarded stage

Grant Lifecycle Report

Food Safety Grant

ORG0038 Food Safety 2022							
Stage	Completed On	Completed By	Files	View/Edit	Last Updated On	Created On	Notes
Grant Awarded	11/30/2022	K. Benoit			12/02/2022	11/30/2022	
Grant Closeout	12/02/2022	K. Benoit				12/02/2022	

In the Grant Status Form, scroll down to the Contract date fields. Make sure the *Contract Close Date* is accurate. If needed, update the field with the correct date.

Contract Start Date*: 02/01/2023

Contract Close Date*: 02/28/2023

Once updated, scroll to the bottom of the page and click *Save*.

Save > Cancel >