

**Welcome to GrantSolutions  
Grants Management Module (GMM)  
Public Grantor Webinar Series**

**Closeout with and without  
Checklist with Deobligation**

February 14, 2017  
2:00 PM – 3:30 PM ET

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The GrantSolutions Center of Excellence (COE)  
Partner Services Training Department

# Agenda

- **Introduction to Grant Closeouts**
- **Grant Closeout with Checklist Process**
- **Grant Closeout without Checklist Process**
- **Help and Support**
- **Register for the Next Public Webinar**
- **Schedule of Future Webinars**
- **Questions and Answers**

# Introduction to Grant Closeouts

# Introduction to Grant Closeouts

- The **GrantSolutions Grants Management Module Closeout Process** provides a cradle to grave support for the full life cycle of grants from Program Announcements to Grant Closeout.
- The **Grant Closeout Process** takes place following the expiration of a grant project period.
- The **Grant Closeout Process** supports users in documenting that all requirements of the grant project have been satisfied and any de-obligating of grant funds not expended by the grantee.

# Introduction to Grant Closeouts

## The Closeout functionality includes:

- the ability to close grants with award transactions that may or may not be sent to the accounting system.
- the ability to “Mark a Grant Closed” ONLY in GMM (without transaction or NOA) and reopen it.
- the ability to establish Grant Office and Program Office Grant Closeout Checklist.
- the ability to complete a Closeout Checklist and indicate a grant is “Ready to Close”.
- the ability to search the Grants List screen for:
  - expired grants
  - grants that are due to expire in 30, 60 or 90 days in the future
  - grants that have expired and have a completed Closeout Checklist indicated by “Ready to Close”
  - all grants that have been closed
  - grants that have been closed after an inserted date; and
  - grants that have been “Marked Closed”
- the ability to close out a grant by budget period.

# Grant Closeout with Checklist Process

# Grant Closeout with Checklist Process

- The Closeout Checklist functionality includes the ability to:
  - add yes/no questions
  - add comments
  - upload files
  - link to Financial Reports

**Note:** All Grant Closeout Checklists when finalized will pre-populate with a required signature and date item. These Checklists may be reopened in the future.

# Grant Closeout w/ Checklist Process - Grants Management Specialist/Program Officer Option(s)

[Page Help](#)

## Grants List

[Simple Search](#)

Organization

▼ Default / Selected Search Criteria

\* Assignment Type: All Grants  \* Expired/Active: Expired Projects, Not Closed

Organization: Center of Excellence

Search within results  Search Export Results Hide Columns ▼

1 - 1 of 1 item [50](#) | [100](#) | [150](#) | [200](#) | [All](#)

<input type="checkbox"/>	Program Office	Grant Program	1 ▲	Grant Number	2 ▲	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
<input checked="" type="checkbox"/>	COA/Office of Research, Development & Information - Program Office	Historically Black College & Universities(HBCU)		110CMS030210		<a href="#">Tennessee State University Center of Excellence</a>	09/30/2007	09/29/2010	No Amendments In-Progress	

Search within results  Search Export Results Hide Columns ▼

1 - 1 of 1 item [50](#) | [100](#) | [150](#) | [200](#) | [All](#)

<input type="checkbox"/>	Program Office	Grant Program	1 ▲	Grant Number	2 ▲	Organization	Project Period Start Date	Project Period End Date	Project	
<input checked="" type="checkbox"/>	COA/Office of Research, Development & Information - Program Office	Historically Black College & Universities(HBCU)		110CMS030210		<a href="#">Tennessee State University Center of Excellence</a>	09/30/2007	09/29/2010	No Amer Progress	
	<b>Project Title:</b>		Addressing Barriers of Self Management Among African Americans with Type-2 Diabetes		<b>Project Locale:</b>		None		<b>Actions</b>	
	<b>Budget Period:</b>		2		<b>Categories:</b>		None		<a href="#">Award Summary</a>	
	<b>Start Date:</b>		09/30/2008		<b>Non Competing Continuation</b>		Not Required		<a href="#">Contact Management</a>	
	<b>End Date:</b>		09/29/2010		<b>Status:</b>				<a href="#">View Report Forms</a>	
	<b>Federal Budget:</b>		\$125,000.00						<a href="#">Change Project Locale</a>	
									<a href="#">Terms and Conditions</a>	
									<a href="#">Manage Project Abstract</a>	
									<a href="#">Closeout Checklist</a>	

# Grant Closeout w/ Checklist Process - Grants Management Officer Option(s) & Mark Grant Closed

Page Help

## Grants List

Simple Search

Organization

▼ Default / Selected Search Criteria

\* Assignment Type: All Grants   \* Expired/Active: Expired Projects, Not Closed

\* Organization: Center of Excellence

Search within results   Search   Export Results   Hide Columns ▼

1 - 1 of 1 item   [50](#) | [100](#) | [150](#) | [200](#) | [All](#)

<input type="checkbox"/>	Program Office	Grant Program	1 ▲	Grant Number	2 ▲	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
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<input type="checkbox"/>	Program Office	Grant Program	1 ▲	Grant Number	2 ▲	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
<input type="checkbox"/>	COA/Office of Research, Development & Information - Program Office	Historically Black College & Universities(HBCU)		110CMS030210		<a href="#">Tennessee State University Center of Excellence</a>	09/30/2007	09/29/2010	No Amendments In-Progress	
<b>Project Title:</b> Addressing Barriers of Self Management Among African Americans with Type-2 Diabetes		<b>Project Locale:</b> None		<b>Categories:</b> None		<b>Actions</b>		<a href="#">Award Summary</a> <a href="#">Contact Management</a> <a href="#">View Report Forms</a> <a href="#">Change Project Locale</a> <a href="#">Terms and Conditions</a> <a href="#">Manage Project Abstract</a> <a href="#">Closeout Checklist</a> <a href="#">Mark Grant Closed</a>		
<b>Budget Period:</b> 2		<b>Non Competing Continuation Status:</b> Not Required								
<b>Start Date:</b> 09/30/2008 <b>End Date:</b> 09/29/2010										
<b>Federal Budget:</b> \$125,000.00										
<b>Last Issued Award</b>										

# Grant Closeout w/ Checklist Process - Grants Management Officer Option(s) & Mark Grant Closed

Search within results										
Search    Export Results    Hide Columns										
1 - 1 of 1 item										
50   100   150   200   All										
<input type="checkbox"/>	Program Office	Grant Program	1 ▲	Grant Number	2 ▲	Organization	Project Period Start Date	3 ▼	Project Period End Date	Project Status
<input type="checkbox"/>	Development & Information - Program Office	Historically Black College & Universities(HBCU)		110CMS030210		<a href="#">University Center of Excellence</a>	09/30/2007		09/29/2010	Closed
<b>Project Title:</b>		Addressing Barriers of Self Management Among African Americans with Type-2 Diabetes		<b>Project Locale:</b>		None		<b>Actions</b>		
<b>Budget Period:</b>		2		<b>Categories:</b>		None		<a href="#">Award Summary</a>		
<b>Start Date:</b>		09/30/2008		<b>Non Competing Continuation Status:</b>		Not Required		<a href="#">Contact Management</a>		
<b>End Date:</b>		09/29/2010								<a href="#">View Report Forms</a>
<b>Federal Budget:</b>		\$125,000.00								<a href="#">Change Project Locale</a>
<b>Closeout Date:</b>		02/13/2017								<a href="#">Terms and Conditions</a>
						<a href="#">Manage Project Abstract</a>				
						<a href="#">Closeout Checklist</a>				
						<a href="#">Reopen Marked Closed</a>				

Search within results											
Search    Export Results    Hide Columns											
1 - 1 of 1 item											
50   100   150   200   All											
<input type="checkbox"/>	Program Office	Grant Program	1 ▲	Grant Number	2 ▲	Organization	Project Period Start Date	3 ▼	Project Period End Date	Project Status	Actions
<input type="checkbox"/>	Development & Information - Program Office	Historically Black College & Universities(HBCU)		110CMS030210		<a href="#">University Center of Excellence</a>	09/30/2007		09/29/2010	No Amendments In-Progress	
<b>Project Title:</b>		Addressing Barriers of Self Management Among African Americans with Type-2 Diabetes		<b>Project Locale:</b>		None		<b>Actions</b>			
<b>Budget Period:</b>		2		<b>Categories:</b>		None		<a href="#">Award Summary</a>			
<b>Start Date:</b>		09/30/2008		<b>Non Competing Continuation Status:</b>		Not Required		<a href="#">Contact Management</a>			
<b>End Date:</b>		09/29/2010								<a href="#">View Report Forms</a>	
<b>Federal Budget:</b>		\$125,000.00								<a href="#">Change Project Locale</a>	
<b>Last Issued Award</b>										<a href="#">Terms and Conditions</a>	
						<a href="#">Manage Project Abstract</a>					
						<a href="#">Closeout Checklist</a>					
						<a href="#">Mark Grant Closed</a>					

# Process Closeout Checklist

## Process Closeout Checklist

**Grant Number**  
90NA5000

**Program**  
Native Americans

**Organization Name**  
OFFICE OF HAWAIIAN AFFAIRS

**Project Period (MM/DD/YYYY)**  
09/30/1988 - 09/29/2002

**Location**  
HONOLULU, HI

Grant Checklist

Program Checklist

9. Question

Action on Indirect Costs, if applicable

Answer

Select ▼

Comments

10. Question

Closeout Letter sent

Answer

Select ▼

Date (MM/DD/YYYY)

Attachment

Upload Document

Save

Signature

I nstructor

Ready To Close

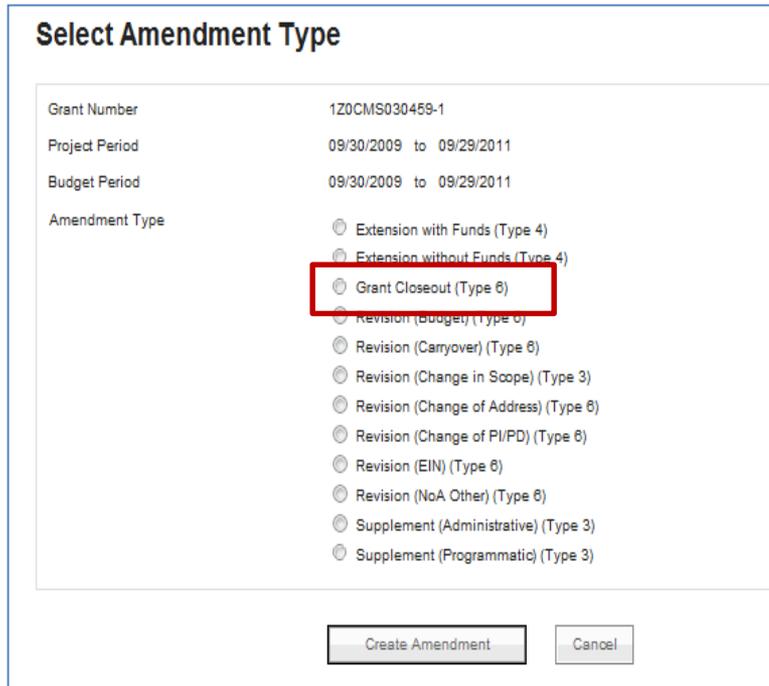
Unsign

Close

# Grant Closeout without Checklist Process

# Grant Closeout without Checklist Process

- The **Grant Closeout without Checklist Process** will consist of initiation and processing a Closeout action as an amendment action from the **Manage Amendments -> Select Amendment Type** Screen.



The screenshot displays the 'Select Amendment Type' interface. It includes the following fields and options:

Grant Number	1Z0CMS030459-1
Project Period	09/30/2009 to 09/29/2011
Budget Period	09/30/2009 to 09/29/2011
Amendment Type	<input type="radio"/> Extension with Funds (Type 4) <input type="radio"/> Extension without Funds (Type 4) <input checked="" type="radio"/> Grant Closeout (Type 6) <input type="radio"/> Revision (Budget) (Type 6) <input type="radio"/> Revision (Carryover) (Type 6) <input type="radio"/> Revision (Change in Scope) (Type 3) <input type="radio"/> Revision (Change of Address) (Type 6) <input type="radio"/> Revision (Change of PI/PD) (Type 6) <input type="radio"/> Revision (EIN) (Type 6) <input type="radio"/> Revision (NoA Other) (Type 6) <input type="radio"/> Supplement (Administrative) (Type 3) <input type="radio"/> Supplement (Programmatic) (Type 3)

At the bottom of the screen, there are two buttons: 'Create Amendment' and 'Cancel'.

# Help and Support

Monday - Friday

8 a.m. to 6 p.m. ET

\*Excluding Federal Holidays

[help@grantsolutions.gov](mailto:help@grantsolutions.gov)

1-866-577-0771

# Register for the Next Public Webinar

[Creating and Posting Funding Opportunity Announcements in GMM](#)

This course demonstrates the process of creating and posting Funding Opportunity Announcements in GMM

Grants  
Office/Program  
Office

Tuesday, March 14  
2:00 – 3:30pm ET

# Schedule of Future Webinars

- To view the schedule of public grantor webinars, from the GMM menu bar select **Help/Support – Documentation**. Under Announcements, click the link **Schedule of Grantor Public Webinars**

Federal Support and Training Resources

**Release Notes**  
Release Notes are used to communicate enhancements and new features in GrantSolutions. They are posted whenever there is a new GrantSolutions version.

**User Guides and Documentation**  
Quick References are brief and easy to follow instructions on targeted processes. These job aids are useful as quick starts and refresher documents.

**Registration Information**  
Registration Information contains instructions for registering Federal or Grantee Staff in GrantSolutions.

**Quick Sheets**  
Quick Sheets and Training Guides are brief and easy to follow instructions on targeted processes. These job aids are useful as quick starts and refresher documents.

**Training Videos**  
View Grantee and Grantor training videos.

**Announcements**  
**Schedule of Grantor Public Webinars**  
Enterprise Release 3.3.1 includes the following changes:

- Filter CFDA by Grant Program on the View Announcement Screen
- Multiple-Project Commitment Accounting Enhancement

**Questions**

**Answers**