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.

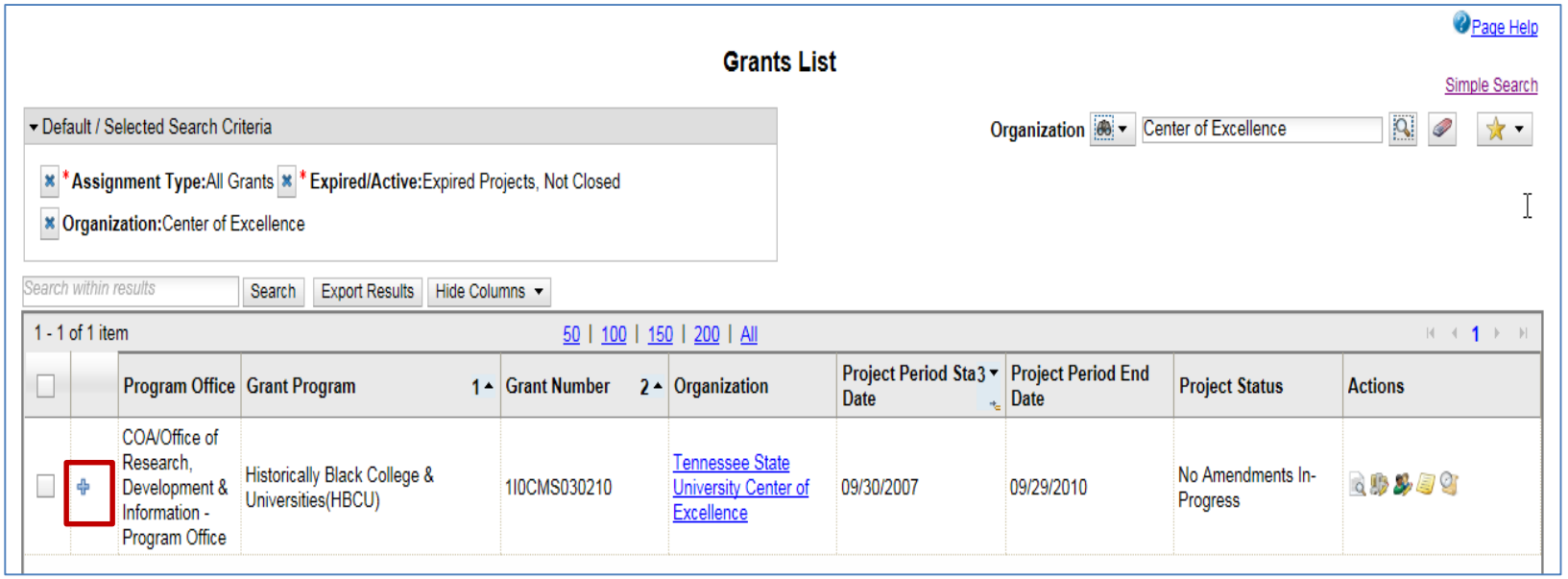
Grant Closeout with Checklist Process

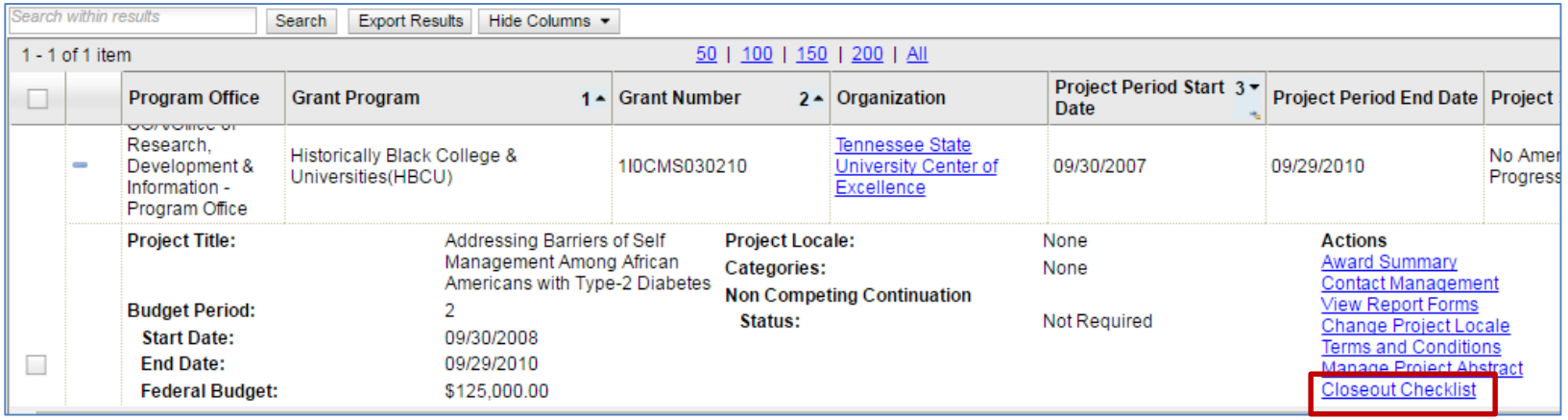
Grant Closeout with Checklist Process

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

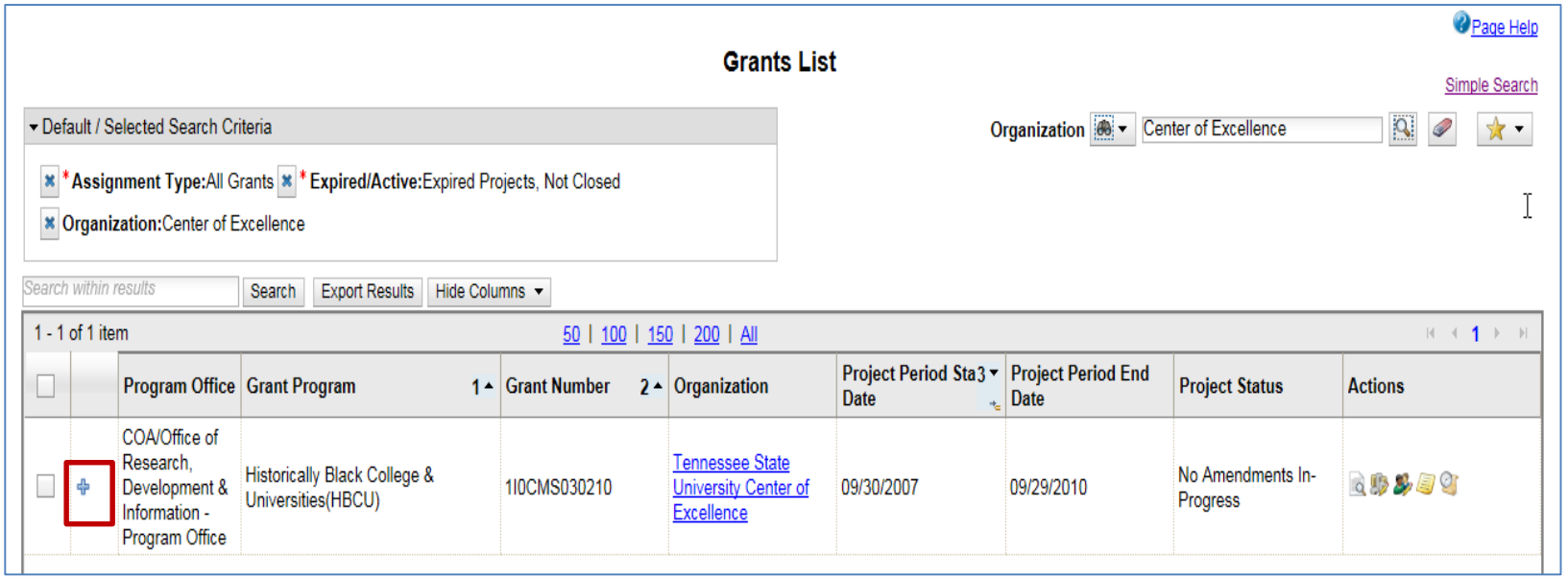
Note: All Grant Closeout Checklists when finalized will pre-populate with a required signature and date item. These Checklists may be reopened in the future.

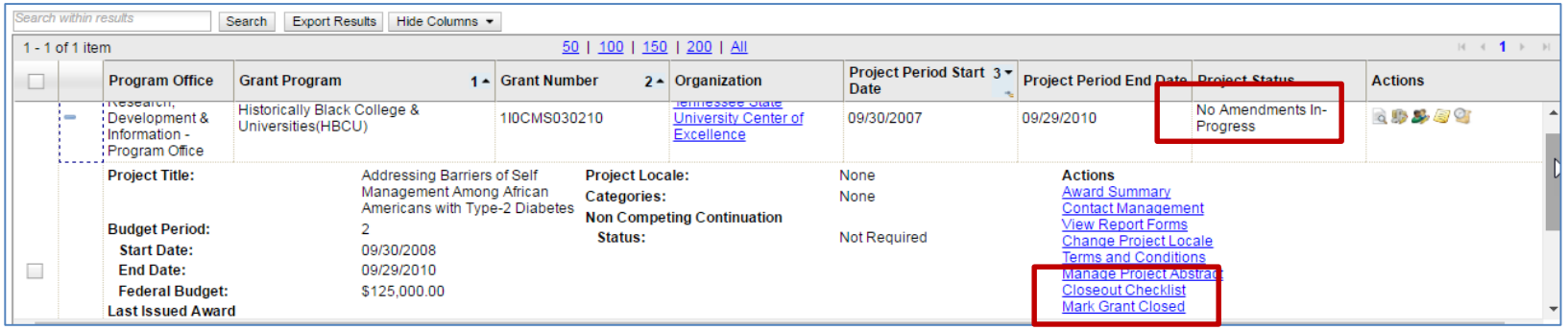
Grant Closeout w/ Checklist Process - Grants Management Specialist/Program Officer Option(s)



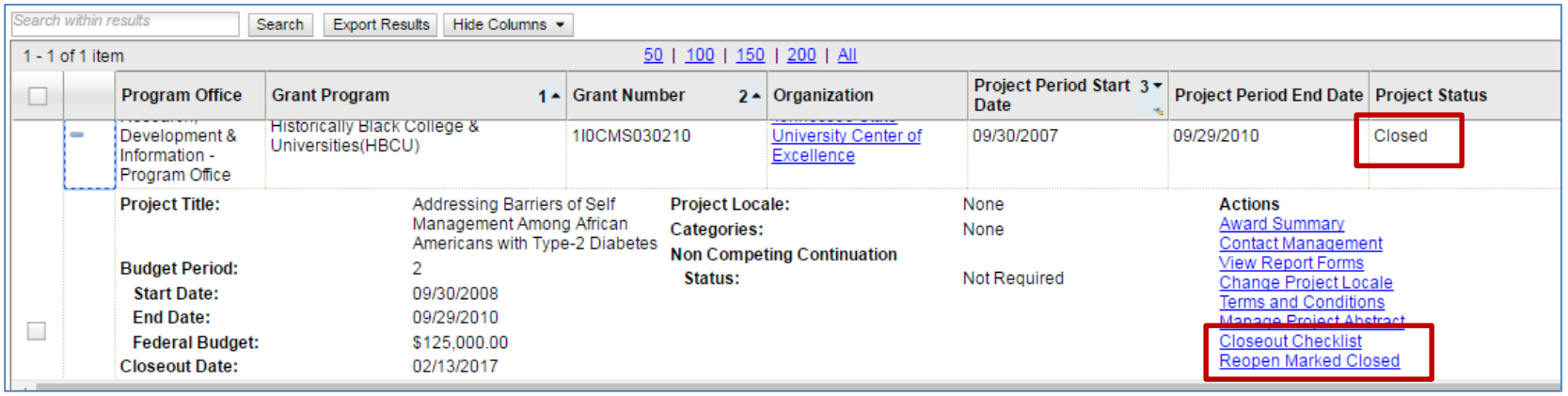


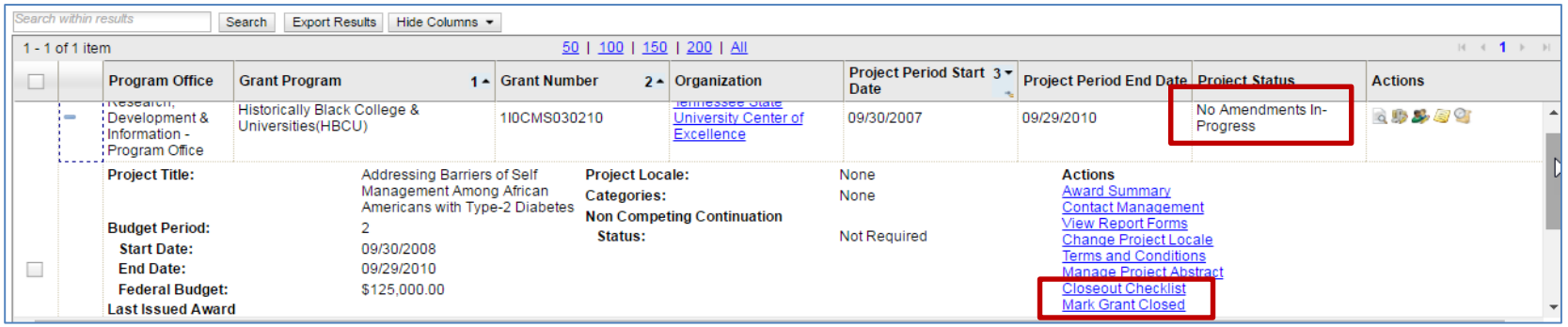
Grant Closeout w/ Checklist Process - Grants Management Officer Option(s) & Mark Grant Closed



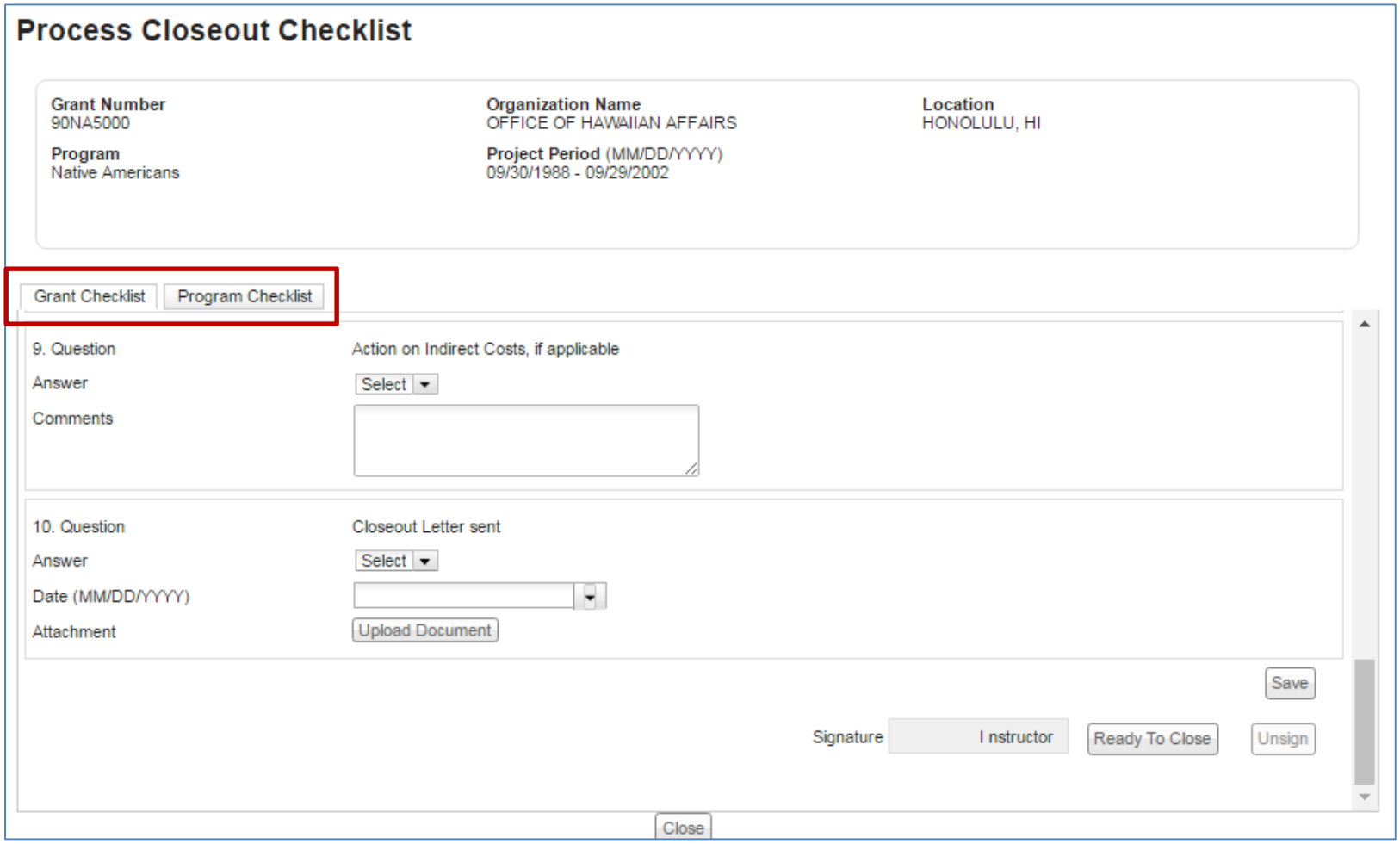


Grant Closeout w/ Checklist Process - Grants Management Officer Option(s) & Mark Grant Closed





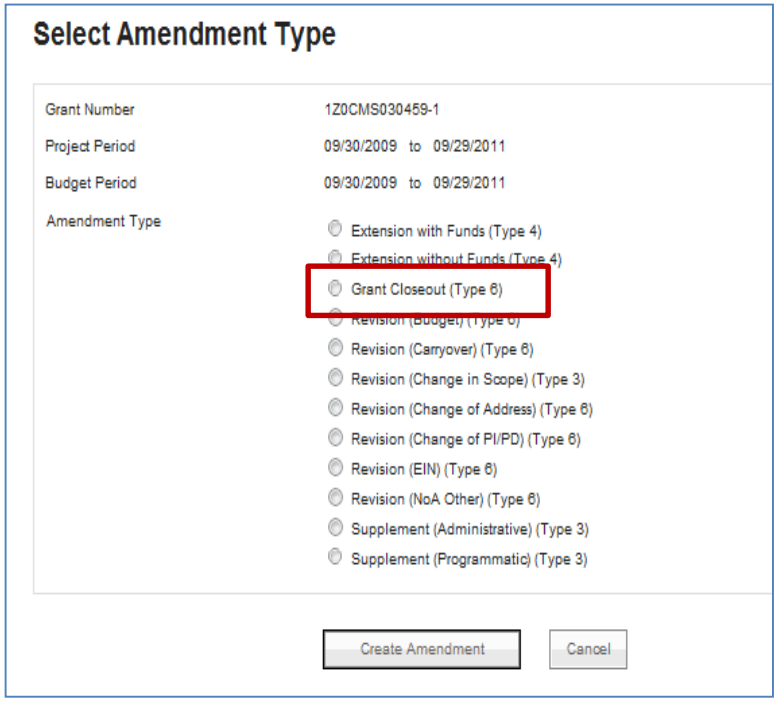
Process Closeout Checklist



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.



Help and Support

Monday - Friday

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

*Excluding Federal Holidays

help@grantsolutions.gov

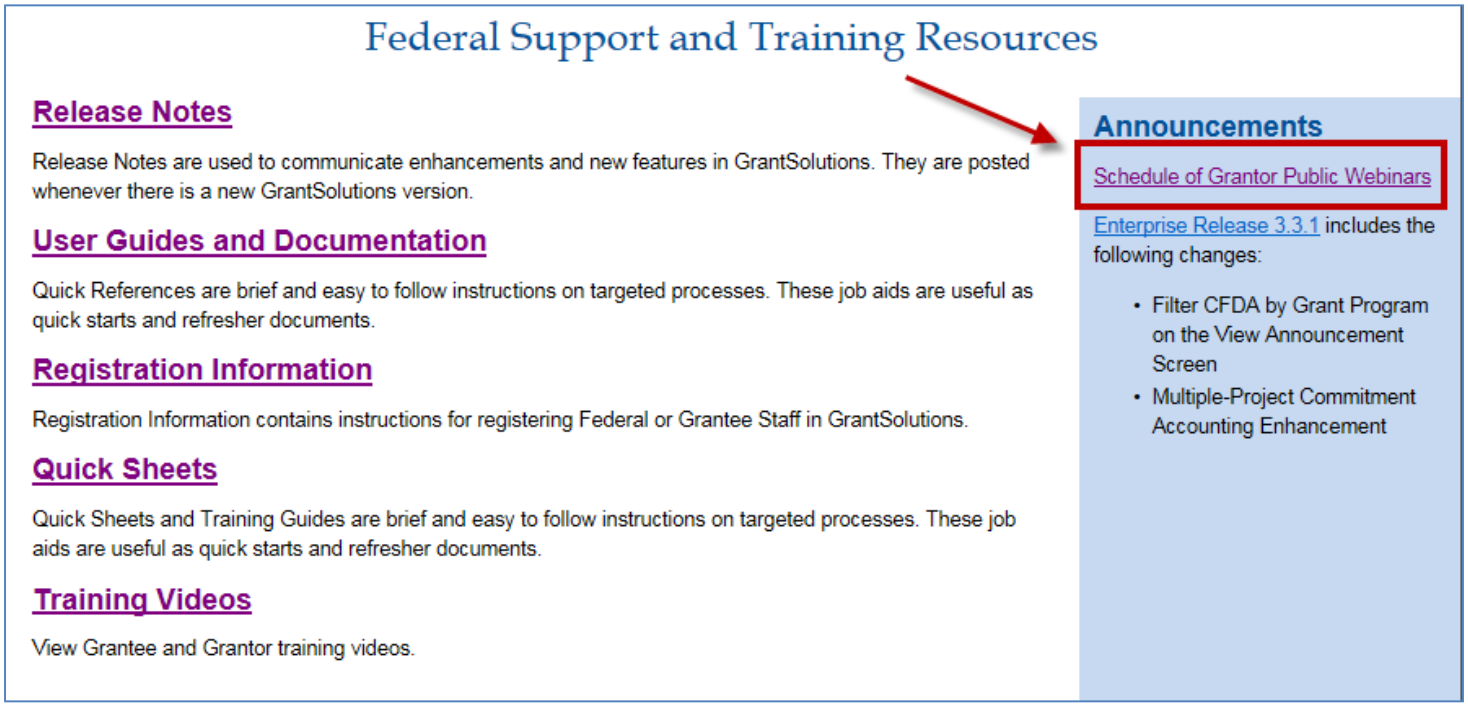
1-866-577-0771

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**



Questions
Answers