

GQUICK SHEET: CLOSEOUT SERVICES – INITIATE A PROJECT PERIOD CLOSEOUT

Audience: Grants Management Specialists (GMS)

PURPOSE:

Closeout Services provides Grants Management Specialists (GMS) a way to initiate closeouts for grant projects in batches.

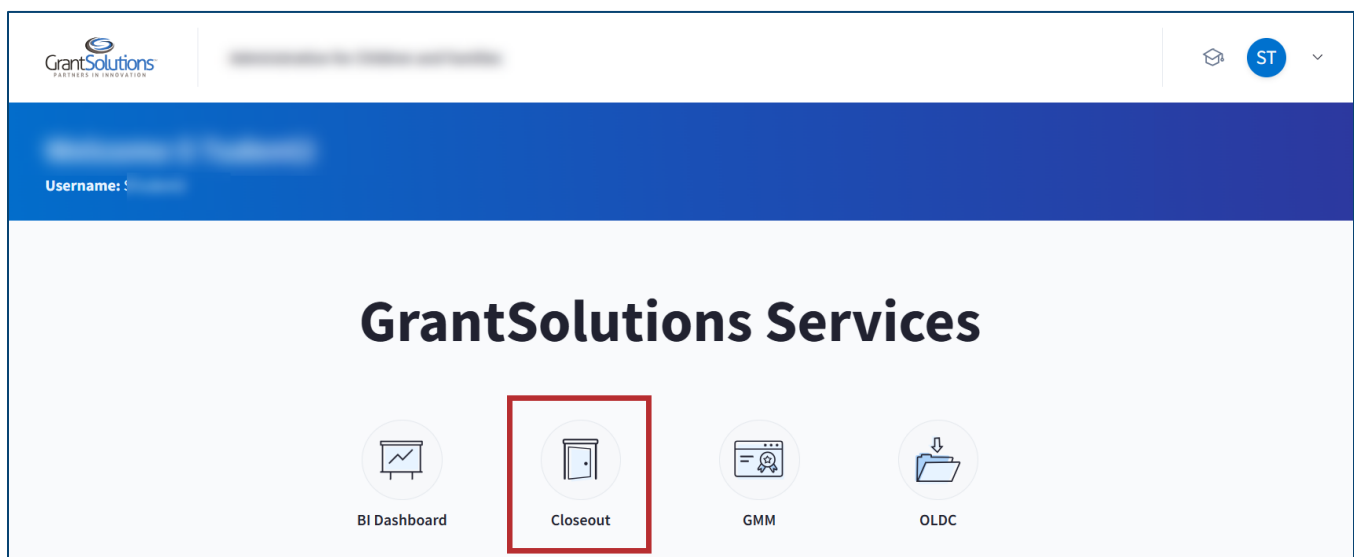
PROJECT PERIOD CLOSEOUT POINTS:

- Project Period Closeout occurs when grants are closed out based on project period end date.
- Expired Projects can be closed on an individual basis or in bulk from the “Project Period Closeout” screen.
- The Grants Management Specialist (GMS) submits the Project Period Closeout batch to the Grants Management Officer (GMO) for approval. The batch must then either be approved by the GMO or returned to the GMS for rework.
- The status of the closeout batch can be tracked from the Closeout Dashboard or the Batch Status screen.

PROJECT PERIOD CLOSEOUT:

To initiate the closeout for one or more eligible projects follow the steps below:

1. From the GrantSolutions “Homepage”, click the **Closeout** icon.



- The “Dashboard” screen appears. Click the **Project Period Closeout** tab.

Closeout

DASHBOARD
PROJECT PERIOD CLOSEOUT
BUDGET PERIOD CLOSEOUT
ADMINISTRATIVE CLOSEOUT
VIEW HISTORY

DASHBOARD

Batch ID	Task Description	Batch Status	Closeout Type	Created By	Created On
	Submit the Batch	Drafted	Project Closeout		4/16/2025, 8:31:14 AM
	Review the Batch	Review In Progress	Project Closeout		5/24/2024, 12:59:47 PM
	Submit the Batch	Returned for Rework	Administrative Closeout		5/15/2024, 10:27:32 AM
	Submit the Batch	Returned for Rework	Budget Closeout		5/15/2024, 10:17:14 AM
	Submit the Batch	Drafted	Project Closeout		5/2/2024, 3:51:49 PM
	Submit the Batch	Drafted	Project Closeout		4/30/2024, 10:21:33 AM
	Submit the Batch	Drafted	Project Closeout		4/23/2024, 11:10:32 AM
	Submit the Batch	Drafted	Project Closeout		4/22/2024, 2:19:52 PM

Show 20 records per page. Page 1 of 1. Total 8 records.

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- The “Project Period Closeout” screen appears. Use the **search fields** to search for a grant to closeout.

Closeout

DASHBOARD
PROJECT PERIOD CLOSEOUT
BUDGET PERIOD CLOSEOUT
ADMINISTRATIVE CLOSEOUT
VIEW HISTORY

PROJECT PERIOD CLOSEOUT

Assistance Type
Select One

Assignment Type
My Grants

Grant Program
Select Grant Program(s)

Project Status
Ready To Close

Search
Reset

OR

Grant Number

Search
Reset

4. A results table appears, review available projects for closeout.

- Click the **dollar amount link** in the Total Deobligation Amount column to open the “Documents Numbers List” screen in a new window.
 - **Note:** The *Total Deobligation Amount* column displays the cumulative deobligation amount (authorized amount minus expended amount) across all obligation document numbers associated with the grant project.
- Click the **Submission List** link from the Action column to open the GMM “Closeout Checklist” screen in a new window.
 - **Note:** The checklist status does not impact the ability to close an eligible project.

Show 20 records per page. Page 1 of 58. Total 1144 records.

	Grant Number	Organization Name	Grant Program	Total Deobligation Amount	Budget Period End Date	Project Period Start Date	Project Period End Date	Action
<input type="checkbox"/>				\$16,434.00	4/30/2018	5/1/2017	4/30/2022	Submission List
<input type="checkbox"/>				\$217,808.97	4/30/2020	5/1/2017	4/30/2022	Submission List
<input type="checkbox"/>				\$52,341.18	4/30/2019	5/1/2017	4/30/2022	Submission List

5. From the Results table, select the **checkboxes** of the grants to close and click the **Submit for Approval** button.

Show 20 records per page. Page 1 of 27. Total 531 records.

<input checked="" type="checkbox"/>				\$264,382.00	6/30/2020	Not Started	Submission List
<input checked="" type="checkbox"/>				\$129,428.00	12/31/2020	Not Started	Submission List
<input checked="" type="checkbox"/>				\$900,397.06	12/31/2018	Not Started	Submission List

[Submit For Approval](#)
[Clear All](#)

6. The “Batch Details” screen appears for review. Users can add or remove documents from the batch by selecting a grant number checkbox and clicking the **Add** or **Remove** buttons.

Closeout
DASHBOARD
PROJECT PERIOD CLOSEOUT
BUDGET PERIOD CLOSEOUT
ADMINISTRATIVE CLOSEOUT
VIEW HISTORY

BATCH DETAILS

Closeout Batch ID:
Created By:
Approved By: N/A
Number of Documents: 1

Closeout Type: Project Closeout
Created On: 4/22/2025
Approved On: N/A
Last Comment: N/A

Status: Drafted
Assigned To:
Completed On: N/A

Add
Remove

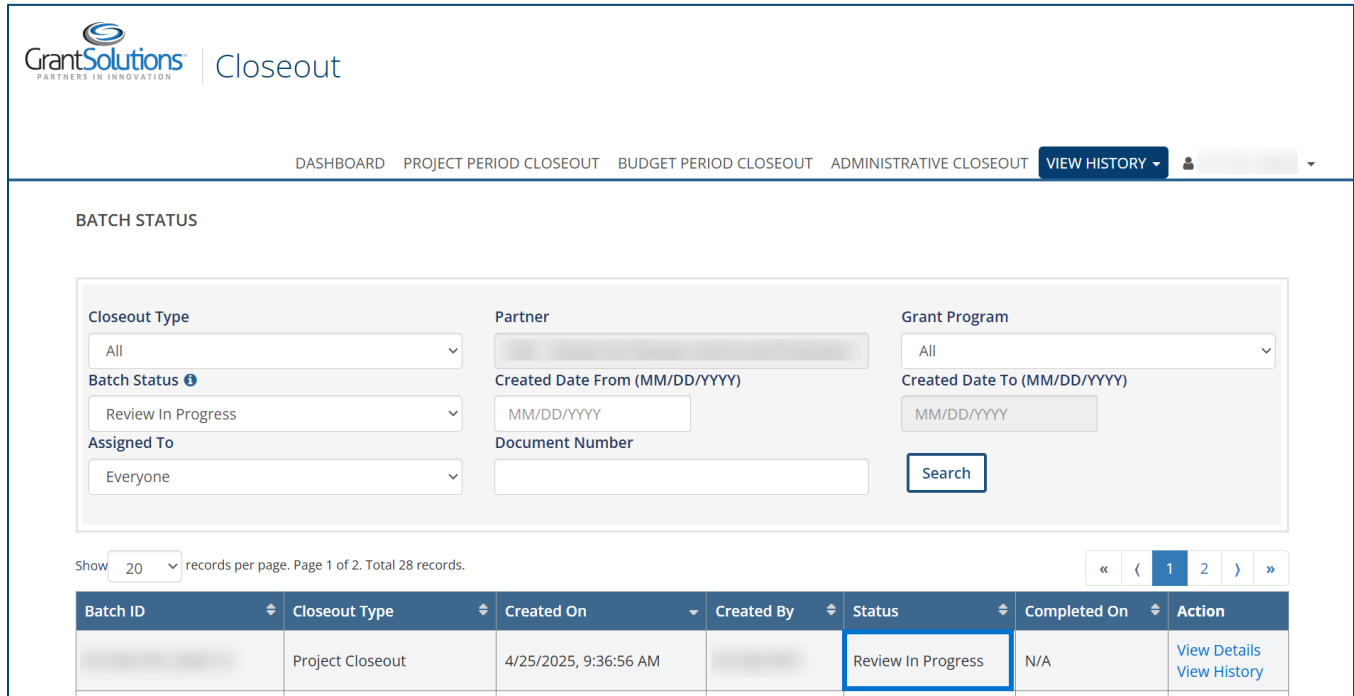
	Grant Number	Organization	Obligation Document Number	Account Type	Financial Account	Fiscal Year	Object Class	Authorized Amount	Expended Amount	Advanced Amount	Deobligation Amount	Difference	Status	PMS Status
<input type="checkbox"/>			000824DD14	P		2015	4151	\$136,464.00	\$136,464.00	\$136,464.00	\$0.00	\$0.00	Added To Batch	Open

7. Add any comments to the batch, if needed. Click the **select GMO user** drop-down, select a **GMO User** to send the batch for closeout and click the **submit the batch for approval** button.
- Note:** Batch remarks are added in the *Remarks* section of the (a) Notice of Award (NOA) in Grants Management Services (GMM), (b) “Award Amount Determination” screen in Mandatory Grants Management Services (MGM), and (c) Award Letter in MGM.

Batch Remarks: 3750 of 3750 characters remaining
500 of 500
Write a

Select GMO User
Submit For Approval
Cancel

8. The “Batch Status” screen appears, and the batch bears the status Review in Progress. Batches can be tracked from the “Batch Status” screen.



The screenshot shows the 'Batch Status' screen in the GrantSolutions system. The header includes the GrantSolutions logo and the word 'Closeout'. Below the header is a navigation bar with links: DASHBOARD, PROJECT PERIOD CLOSEOUT, BUDGET PERIOD CLOSEOUT, ADMINISTRATIVE CLOSEOUT, and a 'VIEW HISTORY' button. The main content area is titled 'BATCH STATUS' and contains a search filter section with the following fields:

- Closeout Type: All
- Batch Status: Review In Progress
- Assigned To: Everyone
- Partner: [Redacted]
- Created Date From (MM/DD/YYYY): MM/DD/YYYY
- Created Date To (MM/DD/YYYY): MM/DD/YYYY
- Document Number: [Redacted]
- Grant Program: All
- Search button

Below the search filters, it indicates 'Show 20 records per page. Page 1 of 2. Total 28 records.' and a pagination control showing page 1 of 2.

Batch ID	Closeout Type	Created On	Created By	Status	Completed On	Action
[Redacted]	Project Closeout	4/25/2025, 9:36:56 AM	[Redacted]	Review In Progress	N/A	View Details View History

9. To move the closeout forward, the GMO must either approve the batch for processing or return the batch to the GMS for rework.
- The GMO will receive an email notification from GrantSolutions when the batch has been sent to them for review.
 - The GMS will receive an email notification from GrantSolutions if the batch has been returned for rework.