

## QUICK SHEET: CLOSEOUT SERVICES – NAVIGATION AND COMMON FEATURES

**Audience:** Grants Management Specialists (GMS)

### PURPOSE:

Closeout Services provides Grants Management Specialists (GMS) and Grants Management Officers (GMOs) a way to closeout Projects, budget periods, and document numbers in batches.

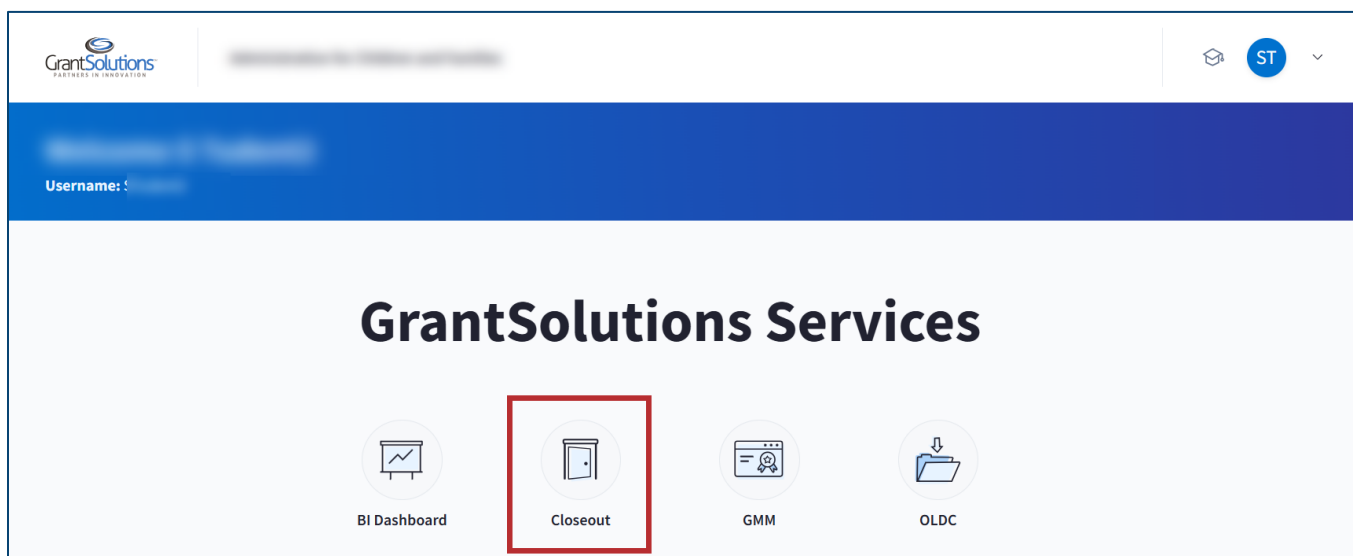
### CLOSEOUT NAVIGATION AND COMMON FEATURES POINTS:

- There are three types of closeout you can perform within GrantSolutions: Project Period, Budget Period, and Administrative.
- The GMS searches for grants to closeout within the Closeout menus and submits batches for the GMO to approve.
- The GMO receives an email notification from GrantSolutions when a grant is ready for closeout review. The GMS receives an email notification from GrantSolutions if the grant is returned for rework.

### CLOSEOUT LOGIN & NAVIGATION:


To navigate to Closeout Services follow the steps below:

1. From the GrantSolutions “homepage”, click the **Closeout** button.



2. Use the menu bar located towards the top of the screen to navigate to the following pages:

- *Dashboard:* Monitor and easily access current tasks within Closeout Services.
- *Project Period Closeout:* Close expired Grant Projects and deobligate remaining funds. Displays a list of expired Projects.
- *Budget Period Closeout:* Close expired budget periods for Projects with multiple budget periods. Displays a list of expired budget periods.
  - **Note:** Budget Period Closeout is used by Partners that close obligation document numbers for an expired budget period (discretionary grants only).
- *Administrative Closeout:* Close a specific obligation document number for a Project.
- *View History:* View and track batches and their statuses, as well as closeout history.


Closeout

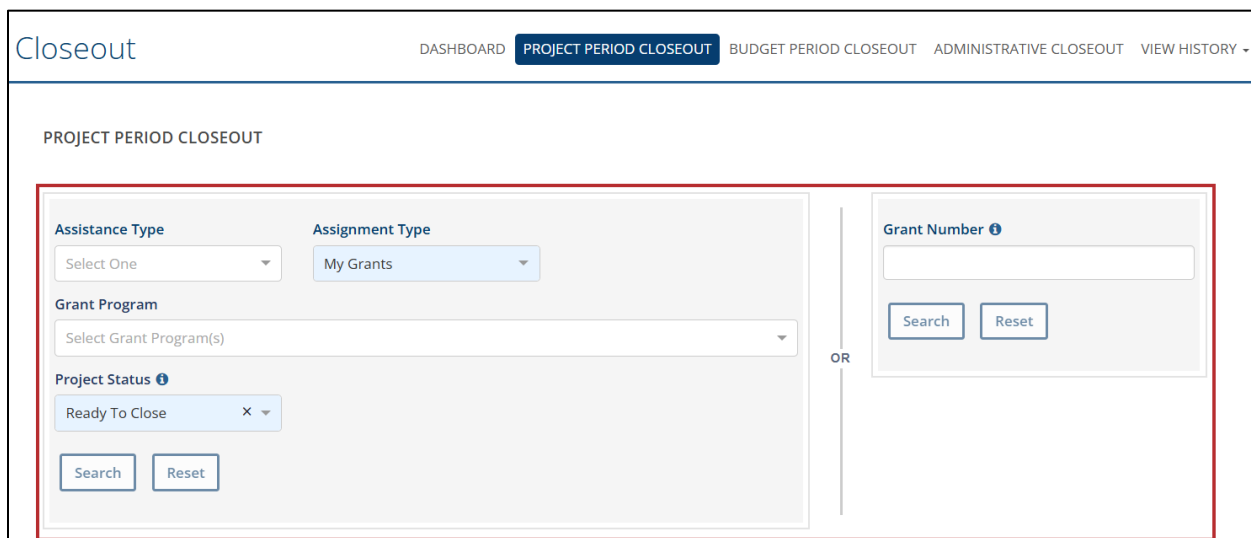
DASHBOARD
PROJECT PERIOD CLOSEOUT
BUDGET PERIOD CLOSEOUT
ADMINISTRATIVE CLOSEOUT
VIEW HISTORY

DASHBOARD

Batch ID	Task Description	Batch Status	Closeout Type	Created By	Created On
	Review the Batch	Review In Progress	Project Closeout		4/25/2025, 9:36:56 AM
	Review the Batch	Review In Progress	Project Closeout		4/24/2025, 11:59:13 AM
	Submit the Batch	Drafted	Project Closeout		4/24/2025, 11:25:20 AM
	Submit the Batch	Drafted	Project Closeout		4/22/2025, 4:19:35 PM
	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

## CLOSEOUT COMMON FEATURES:

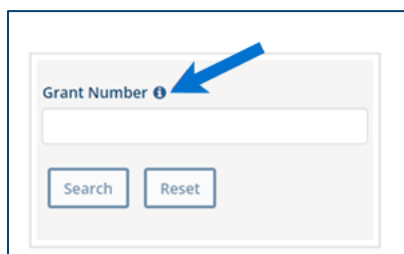
The “Project Period Closeout”, “Budget Period Closeout”, “Administrative Closeout”, and “Batch Status” screens each have a search section located towards the top of the screen. Search by using (a) The filters provided, (b) Entering the full grant number, or (c) Entering a partial grant number followed by the “%” character to run a wildcard search.



The screenshot shows the 'Closeout' application interface. At the top, there is a navigation bar with 'Closeout' on the left and a menu on the right containing 'DASHBOARD', 'PROJECT PERIOD CLOSEOUT' (highlighted), 'BUDGET PERIOD CLOSEOUT', 'ADMINISTRATIVE CLOSEOUT', and 'VIEW HISTORY'. Below the navigation bar, the main heading is 'PROJECT PERIOD CLOSEOUT'. The search section is divided into two main areas by a vertical line with 'OR' in the middle. The left area contains filters: 'Assistance Type' (dropdown with 'Select One'), 'Assignment Type' (dropdown with 'My Grants'), 'Grant Program' (dropdown with 'Select Grant Program(s)'), and 'Project Status' (dropdown with 'Ready To Close'). Below these filters are 'Search' and 'Reset' buttons. The right area contains a 'Grant Number' field with an information icon, and 'Search' and 'Reset' buttons below it. A red rectangle highlights the search section.

To learn more about each search option, please refer to the “Closeout Services User Guide – Grants Management Officers”.

*Information* icons are also available from several fields in Closeout. Click the *information* icon to open a detailed explanation of a field.



This closeup shows the 'Grant Number' field. A blue arrow points to the information icon (a small 'i' in a circle) located to the right of the field label. Below the field are 'Search' and 'Reset' buttons.

The results table appears below each search section. Columns may vary from screen to screen, but each results table contains the following features:

- Sortable column headers
- A *Show* drop-down list used to select the number of results that appear in the table
- Previous and next page buttons
- Checkboxes that are selected to add the record to a closeout batch
- Links in the *Action* column are used to view information or perform a task

PROJECT PERIOD CLOSEOUT

Assistance Type  
Discretionary
Assignment Type  
All Grants
Grant Program
Project Status  
Ready To Close
Search Reset

Grant Number
Search Reset

OR

Show 20 records per page. Page 1 of 1. Total 7 records.

Grant Number	Organization Name	Grant Program	Total Deobligation Amount	Project Period End Date	Checklist Status	Action
<input type="checkbox"/>			\$265,605.45	9/29/2024	Not Started	Submission List
<input type="checkbox"/>			\$246,319.85	6/30/2024	Not Started	Submission List
<input type="checkbox"/>			\$17,107.46	9/29/2024	Not Started	Submission List
<input type="checkbox"/>			\$76,022.81	9/29/2024	Not Started	Submission List
<input type="checkbox"/>			\$167,828.75	12/31/2024	Not Started	Submission List
<input type="checkbox"/>			\$33,734.10	9/29/2024	Not Started	Submission List
<input type="checkbox"/>			\$126,619.32	12/30/2024	Not Started	Submission List

Show 20 records per page. Page 1 of 1. Total 7 records.

Closeout Clear All

Previous and next page buttons

Sortable column

Show records drop-down list


Select a checkbox to add to a batch



Action Link


## CLOSEOUT EMAIL NOTIFICATIONS:

(Discretionary Grants) GMOs and GMSs assigned to grant projects with the primary project assignment receive an email notification listing grant projects or budget periods that have recently expired. This message is only sent once for an expired grant project or budget period.

### Pending Closeout Actions



















From: [noreply@grantsolutions.gov](mailto:noreply@grantsolutions.gov)   
To:   
Date: Today 15:49



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PARTNERS IN INNOVATION

Dear Grants Office

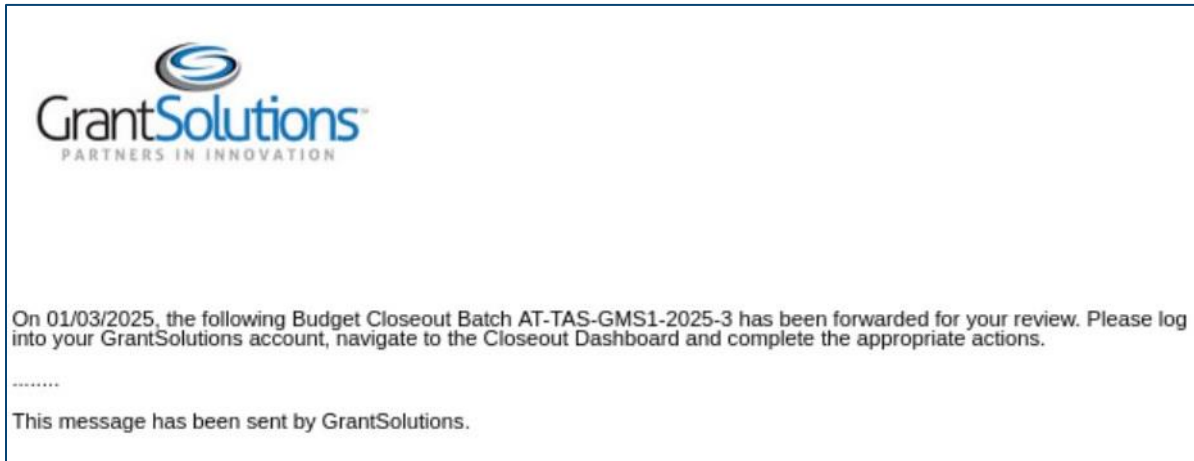
You are receiving this notification because our records indicate that the following items are pending closeout. In accordance with the Office of Grants Management closeout process the grants office is required to complete the closeout process. You can perform closeout action by accessing the [Closeout Service](#) within GrantSolutions system. If you experience any issues accessing the Closeout Service please contact the GrantSolutions helpdesk.

Grant Number	Organization Name	Grant Program	Closeout Type	Start/End Date	Assigned To
			Budget Period	Budget Start: Tue Sep 30 04:00:00 UTC 2014 Budget End: Tue Sep 29 04:00:00 UTC 2015	GMS: 
			Project Period	Project Start: Sun Sep 30 04:00:00 UTC 2012 Project End: Tue Sep 29 04:00:00 UTC 2015	GMS: 
			Budget Period	Budget Start: Mon Sep 30 04:00:00 UTC 2013 Budget End: Mon Sep 29 04:00:00 UTC 2014	GMS: 
			Budget Period	Budget Start: Tue Sep 30 04:00:00 UTC 2014 Budget End: Tue Sep 29 04:00:00 UTC 2015	GMS: 

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Sincerely, Office of Grants Management

When a GMS submits a closeout batch to the GMO, the GMO receives an email notification from GrantSolutions.



If the GMO returns the closeout batch to the GMS for rework, the GMS will receive an email notification from GrantSolutions.

