

QUICK SHEET: CLOSEOUT SERVICES - UPDATE AND RESEND A BATCH TO THE GMO

Audience: Grants Management Specialists (GMS)

PURPOSE:

Grants Management Specialists (GMS) create closeout batches and send them to the Grants Management Officer (GMO) for approval. When the GMO sends the batch back to the GMS for changes, the GMS updates the batch for review and approval.

UPDATE AND RESEND A BATCH TO THE GMO POINTS:

- GMS' can review batches returned for rework from the Closeout Dashboard or the Batch Status screen.
- GMS' can add or remove documents from the batch, add batch remarks, and resubmit the package to the GMO for review and approval.
- The resubmitted batch can be monitored from the Closeout Dashboard or Batch Status screens.

UPDATE AND RESEND A BATCH TO THE GMO STEPS:

When a GMO returns a batch to the GMS for rework, the GMS receives an email notification from GrantSolutions.



On 12/16/2024, the following Project Closeout Batch AT-ACF-GMS1-2025-1 has been Returned for Rework. Please log into your GrantSolutions account, navigate to the Closeout Dashboard and complete the appropriate actions.

This message has been sent by GrantSolutions.

The GMS can then access the batch one of two ways:

- From the “Closeout Dashboard” screen, click the **Batch ID** link associated with the batch that was returned for rework.

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
GMO1-2025-9	Submit the Batch	Drafted	Project Closeout		4/22/2025, 4:19:35 PM
GMO1-2025-2	Submit the Batch	Drafted	Project Closeout		4/16/2025, 8:31:14 AM
GMS1-2024-6	Review the Batch	Review In Progress	Project Closeout		5/24/2024, 12:59:47 PM
GMO1-2024-14	Submit the Batch	Returned for Rework	Project Closeout		5/15/2024, 10:27:32 AM
GMO1-2024-11	Submit the Batch	Returned for Rework	Budget Closeout		5/15/2024, 10:17:14 AM
GMO1-2024-4	Submit the Batch	Drafted	Project Closeout		5/2/2024, 3:51:49 PM
GMO1-2024-3	Submit the Batch	Drafted	Project Closeout		4/30/2024, 10:21:33 AM
GMO1-2024-2	Submit the Batch	Drafted	Project Closeout		4/23/2024, 11:10:32 AM
GMO1-2024-1	Submit the Batch	Drafted	Project Closeout		4/22/2024, 2:19:52 PM

Show 20 records per page. Page 1 of 1. Total 9 records.

« (1) »

- From the “Dashboard” screen, click the View History drop-down and select the Batch Status option.

GrantSolutions | Closeout


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

DASHBOARD

BATCH STATUS
CLOSEOUT HISTORY

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
	Submit the Batch	Returned for Rework	Administrative Closeout		5/15/2024, 10:27:32 AM

The “Batch Status” screen appears, filter by *Returned for Rework* and click the **View Details** link associated with batch.


Closeout

DASHBOARD PROJECT PERIOD CLOSEOUT BUDGET PERIOD CLOSEOUT ADMINISTRATIVE CLOSEOUT VIEW HISTORY

BATCH STATUS

Closeout Type
All

Partner

Grant Program
All

Batch Status ⓘ
Returned for Rework

Created Date From (MM/DD/YYYY)
MM/DD/YYYY

Created Date To (MM/DD/YYYY)
MM/DD/YYYY

Assigned To
Everyone

Document Number

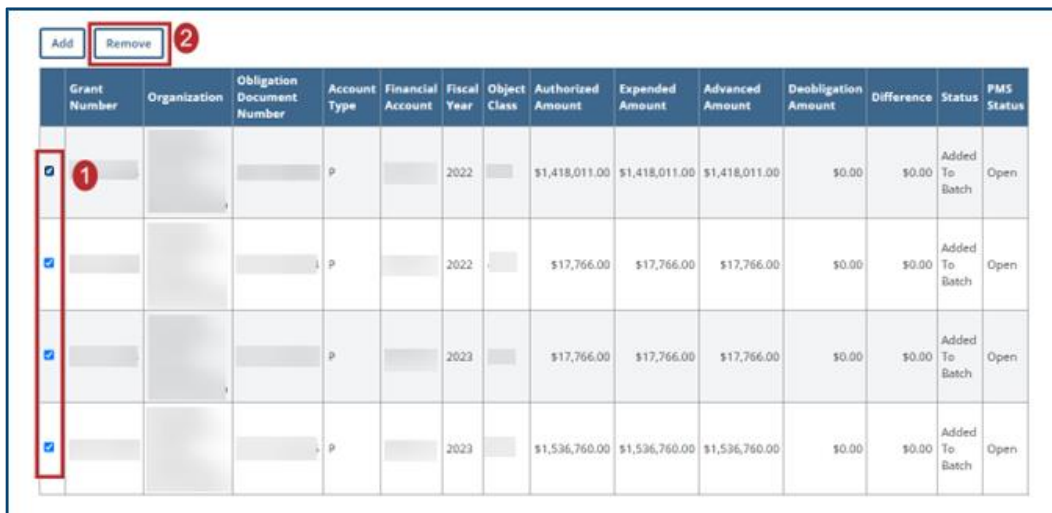
Search

Show 20 records per page. Page 1 of 1. Total 4 records.

Batch ID	Closeout Type	Created On	Created By	Status	Completed On	Action
	Project Closeout	2/10/2025, 2:14:03 PM		Returned for Rework	N/A	View Details View History

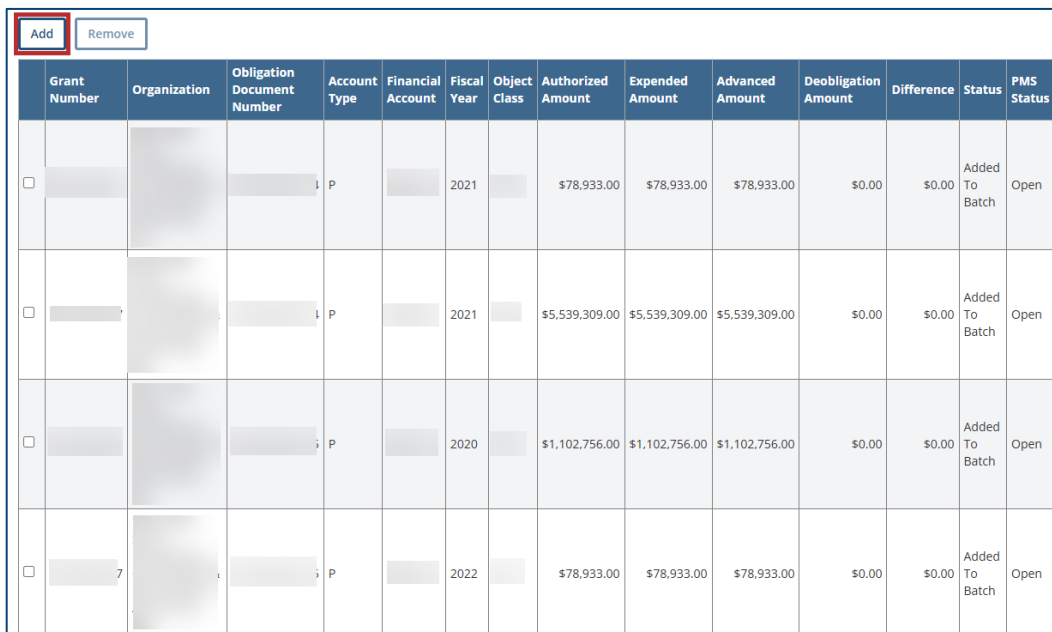
The “Batch Details” screen appears, and the Status is *Returned for Rework*. Review the Last Comment field for GMO guidance.

1. Use the **Add** or **Remove** buttons from the “Batch Details” screen to update which documents are in the batch.
 - To remove one or more documents from the batch, select the **checkbox** beside the Grant Number and click the **Remove** button.



	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 checked="" type="checkbox"/>	1			P		2022		\$1,418,011.00	\$1,418,011.00	\$1,418,011.00	\$0.00	\$0.00	Added To Batch	Open
<input checked="" type="checkbox"/>				P		2022		\$17,766.00	\$17,766.00	\$17,766.00	\$0.00	\$0.00	Added To Batch	Open
<input checked="" type="checkbox"/>				P		2023		\$17,766.00	\$17,766.00	\$17,766.00	\$0.00	\$0.00	Added To Batch	Open
<input checked="" type="checkbox"/>				P		2023		\$1,536,760.00	\$1,536,760.00	\$1,536,760.00	\$0.00	\$0.00	Added To Batch	Open

- To add one or more documents to the batch, click the **Add** button.



	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"/>				P		2021		\$78,933.00	\$78,933.00	\$78,933.00	\$0.00	\$0.00	Added To Batch	Open
<input type="checkbox"/>				P		2021		\$5,539,309.00	\$5,539,309.00	\$5,539,309.00	\$0.00	\$0.00	Added To Batch	Open
<input type="checkbox"/>				P		2020		\$1,102,756.00	\$1,102,756.00	\$1,102,756.00	\$0.00	\$0.00	Added To Batch	Open
<input type="checkbox"/>	7			P		2022		\$78,933.00	\$78,933.00	\$78,933.00	\$0.00	\$0.00	Added To Batch	Open

- The appropriate closeout screen (Project, Budget, Administrative) will appear. Enter information into the search fields and click the **Search** button.

PROJECT PERIOD CLOSEOUT

Batch Details

Closeout Batch ID: [REDACTED]	Closeout Type: Project Closeout	Status: Returned for Rework
Created By: [REDACTED]	Created On: 7/29/2022	Assigned To: [REDACTED]
Approved By: N/A	Approved On: N/A	Completed On: N/A
Number of Documents: 2	Last Comment: Please make changes as discussed.	

Assistance Type: Select One

Assignment Type: My Grants

Grant Program: Select Grant Program(s)

Project Status: Ready To Close

Search Reset

Grant Number ?

Search Reset

- The screen refreshes with a results table. Select the **checkbox** next to each project period, budget period, or obligation document number and click the **Add to Batch** button.

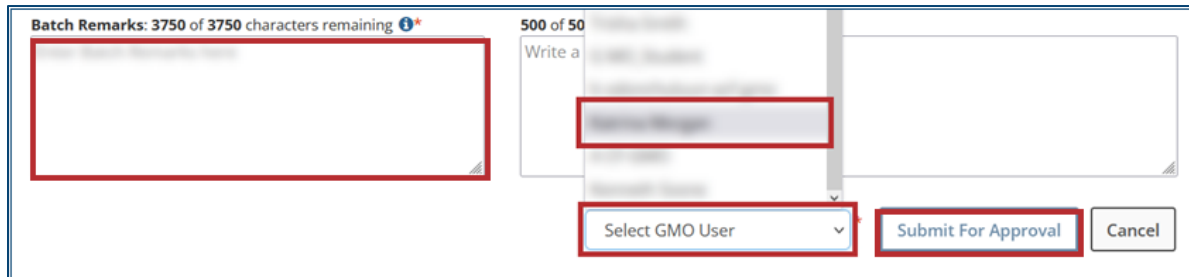
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]	[REDACTED]	\$0.00	6/30/2019	In Progress	Submission List
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]	[REDACTED]	\$139,332.96	11/30/2019	In Progress	Submission List
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]	[REDACTED]	\$66,128.00	6/30/2020	In Progress	Submission List

Show 20 records per page. Page 1 of 25. Total 494 records.

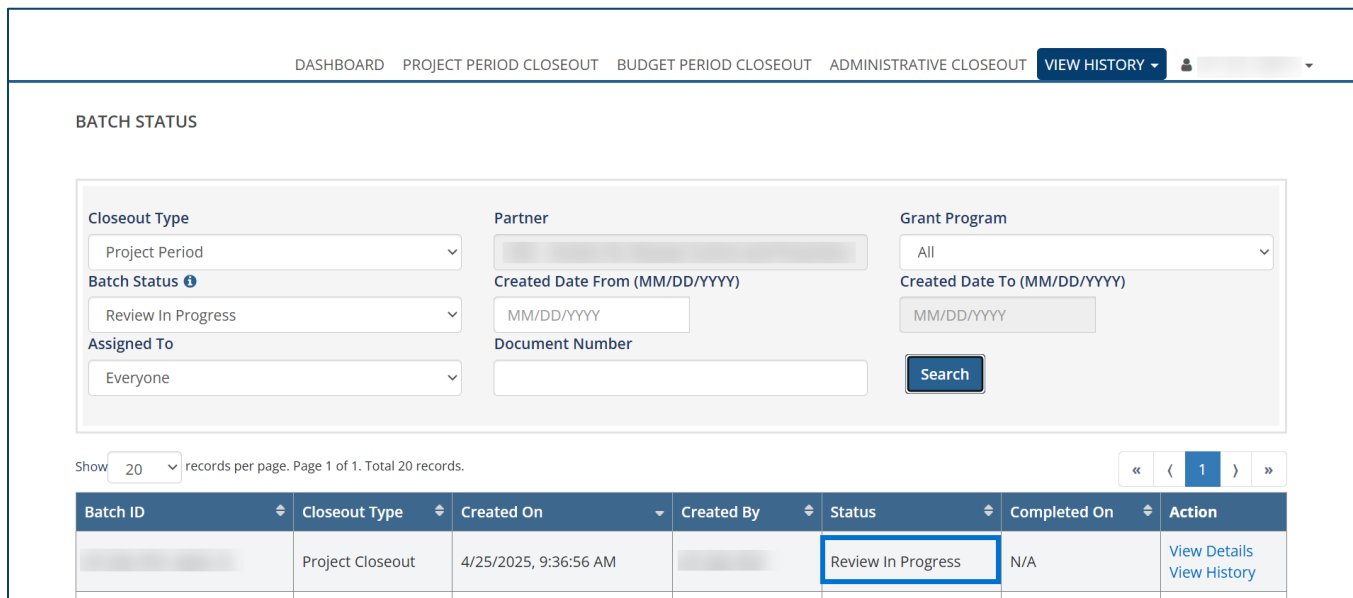
« (1 2 3 4 5 ...) »

Add To Batch Clear All Cancel

- The “Batch Details” screen appears, and the new documents have been added to the batch. Add any *Batch Remarks* as necessary. Then, **select a GMO User** from the drop-down list and click the **Submit for Approval** button.



- Once the updated batch is resubmitted to the GMO, the “Batch Status” screen appears and the submitted *Batch ID* is a *Review In Progress* status.



BATCH STATUS

Closeout Type: Project Period

Batch Status: Review In Progress

Assigned To: Everyone

Partner: [Redacted]

Grant Program: All

Created Date From (MM/DD/YYYY): MM/DD/YYYY

Created Date To (MM/DD/YYYY): MM/DD/YYYY

Document Number: [Redacted]

Search

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

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