

GrantSolutions

Discretionary Grant Closeout User Manual

Amendment Processing – Phase 1

Closeout Checklists, Mark a Grant Closed – Phase 2

12/15/2011

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I. Overview

With the addition of the Closeout module, GrantSolutions provides cradle to grave support for the full life cycle of grants from Program Announcements to Grant Closeout. Grant Closeout is the process that takes place following the expiration of a grant project period for a discretionary grant or cooperative agreement. The closeout module supports UFMS 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.

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 GrantSolutions(without transaction or NGA)and reopen it;
- the ability to establish Grant Office and Program Office Grant Closeout Checklists;
- the ability to complete a Closeout Checklist and indicate a grant is "Ready to Close";
- the ability to search the Grants List (beta) 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,"

A new feature which allows Administrators to develop and establish Grants Closeout Checklists and Program Closeout Checklist includes options in developing the Checklist include the ability to:

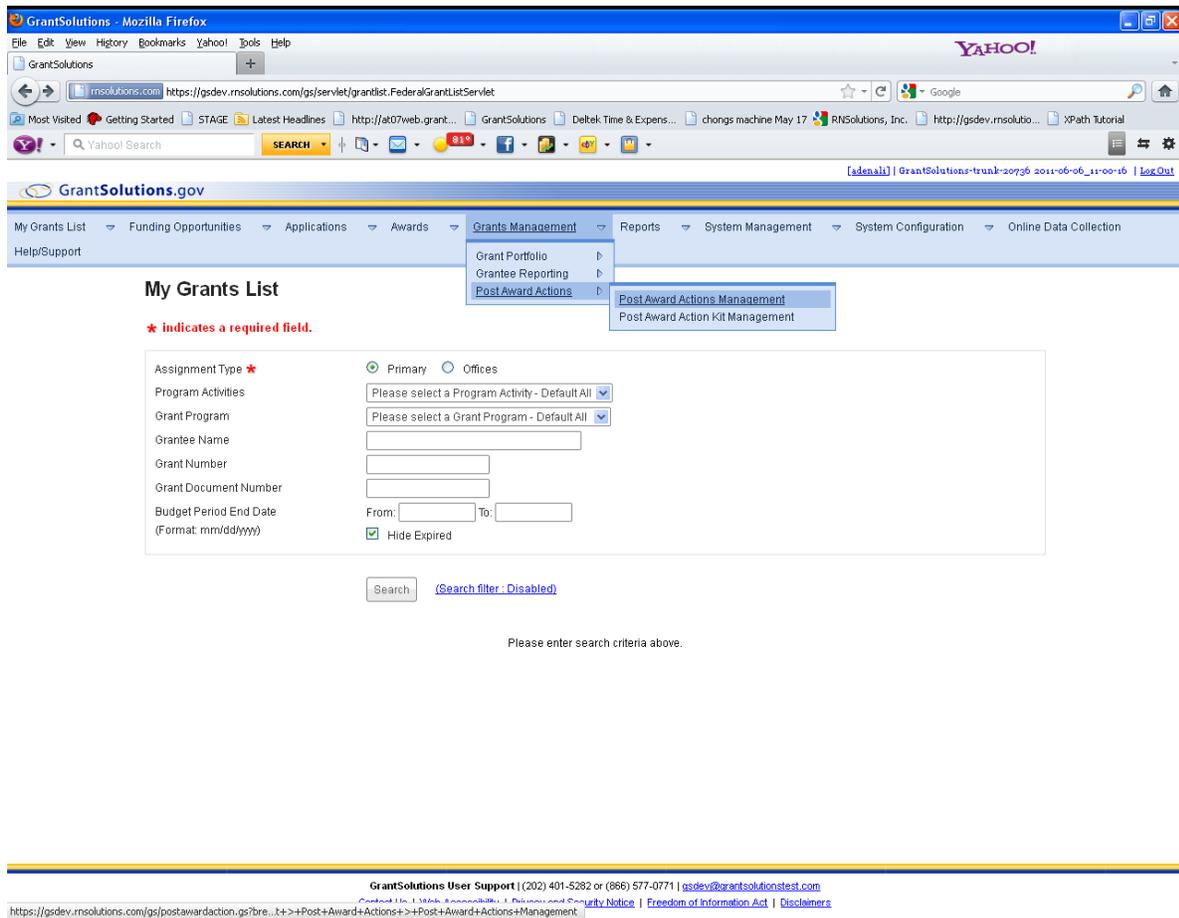
- add yes/no questions,
- add comments,
- upload files
- link to Financial Reports and
- link to OLDC.

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

II. Set Up

To set up “Closeout” as an amendment:

Logged in as a GMO, from the main menu, go to Grants Management > Post Award Actions > Post Award Actions Management.



Displayed is the Post Award Actions Management screen.

Confirm the Partner selected and click on “Add Partner Action” button. To add closeout as an amendment type, Enter the Action Name, complete the radio button for Closeout Grant and click the “Add” button.

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msolutions.com https://gsdev.msolutions.com/gspostawardaction.gs?partnerId=509

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Help/Support

Post Award Actions Management

Select Partner: Toys Administration

[Printable Version](#)

Action Code	Action Name	Prior Approval Required	Federal Action Only	Requested Amount is for New Money	Closeout Grant	Active	Action S
3	NGA Revision	N	N	N	N	Y	Partner
3	YAYYYYY NEW RELEASE	Y	N	Y	Y	Y	Partner
4	Extension with Funds	Y	N	Y	N	Y	Partner
6	Administrative/Supplement Increase	Y	Y	Y	N	Y	Partner
6	BudgetRevision	Y	N	Y	N	Y	Partner
7	11111-----1-1-1-1-11234567890123456789012345678901234567890123456789012345678901	Y	Y	Y	N	Y	Partner
7	Blah	Y	N	Y	N	N	Partner

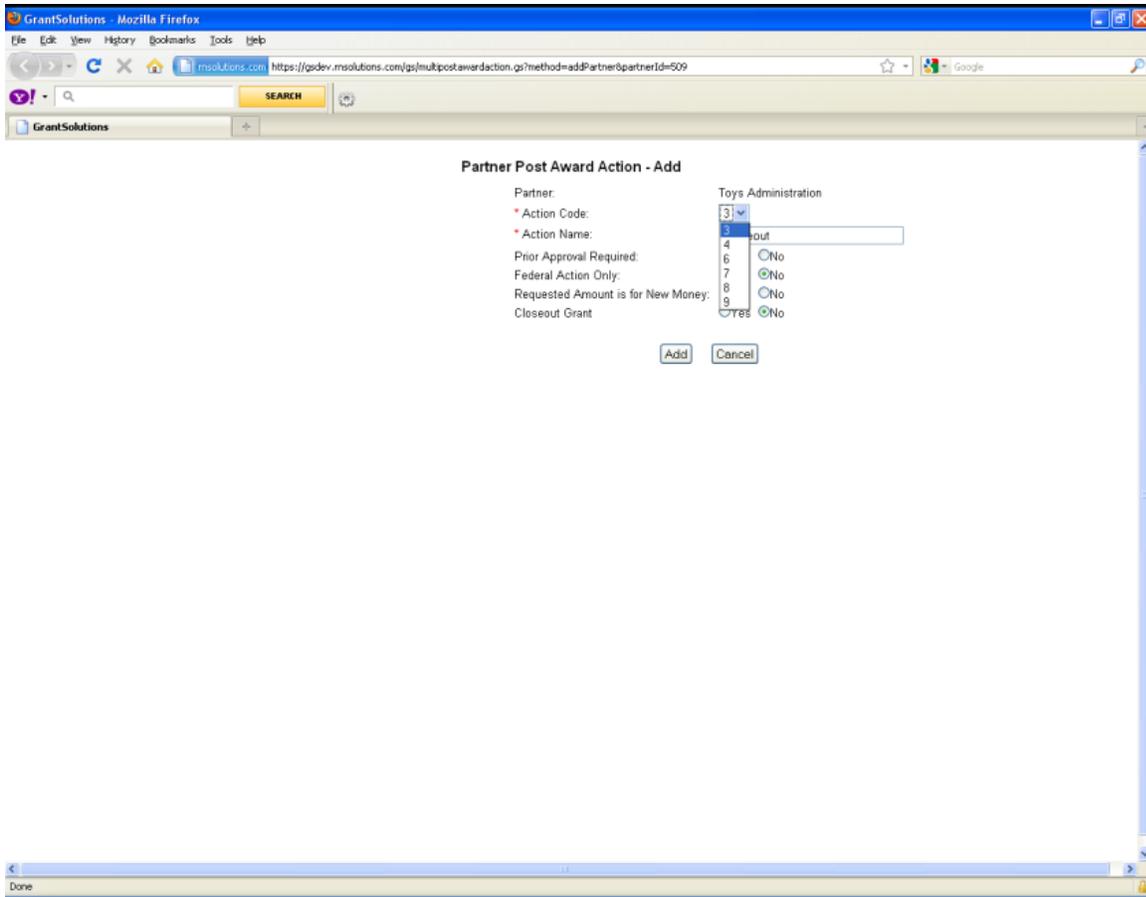
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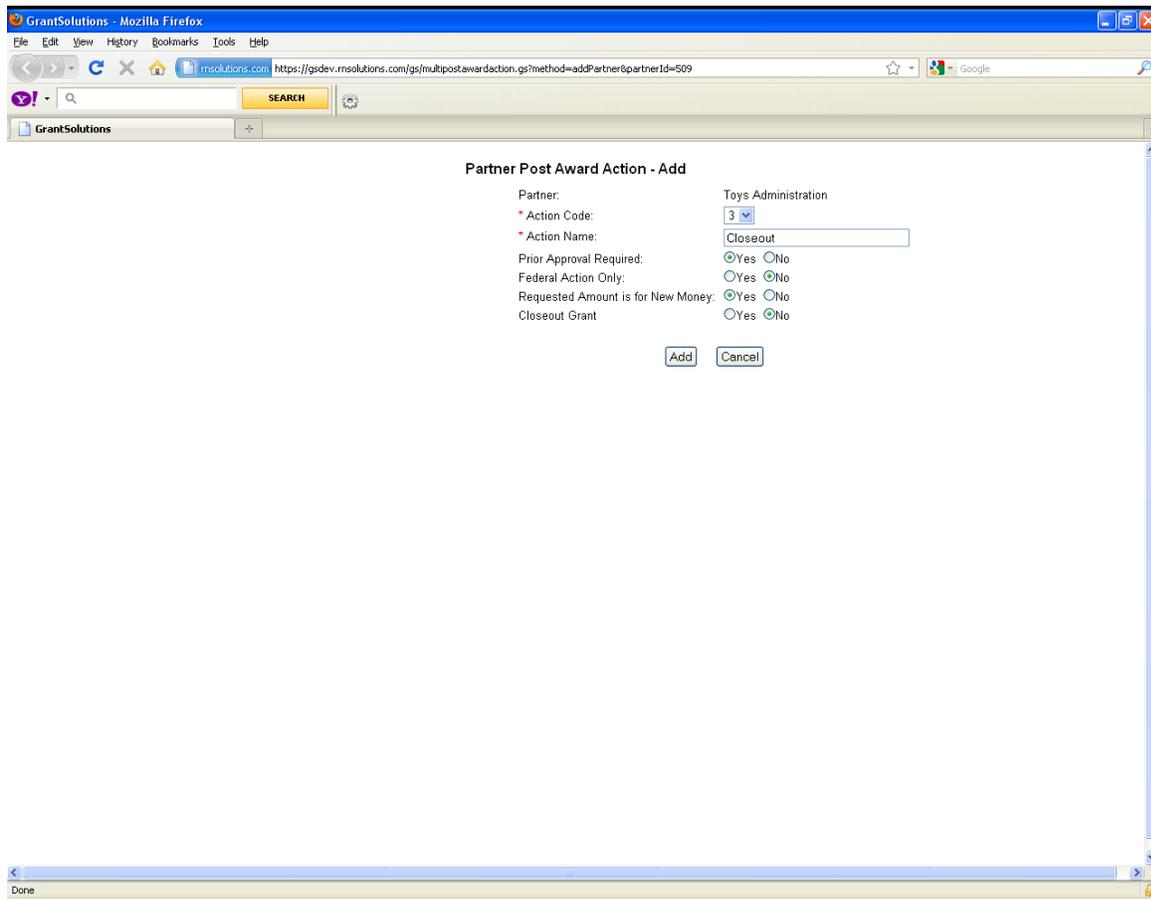
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Done

Displayed with be the Partner Post Award Action – Add screen.

Select an Action Code from the drop down menu and enter a Action Name (both are required fields).





Click the Add button after selecting an Action Code and entering an Action name. Displayed will be the Post Award Actions Management screen which includes the new Closeout post award action.

Post Award Actions Management

Select Partner:

[Printable Version](#)

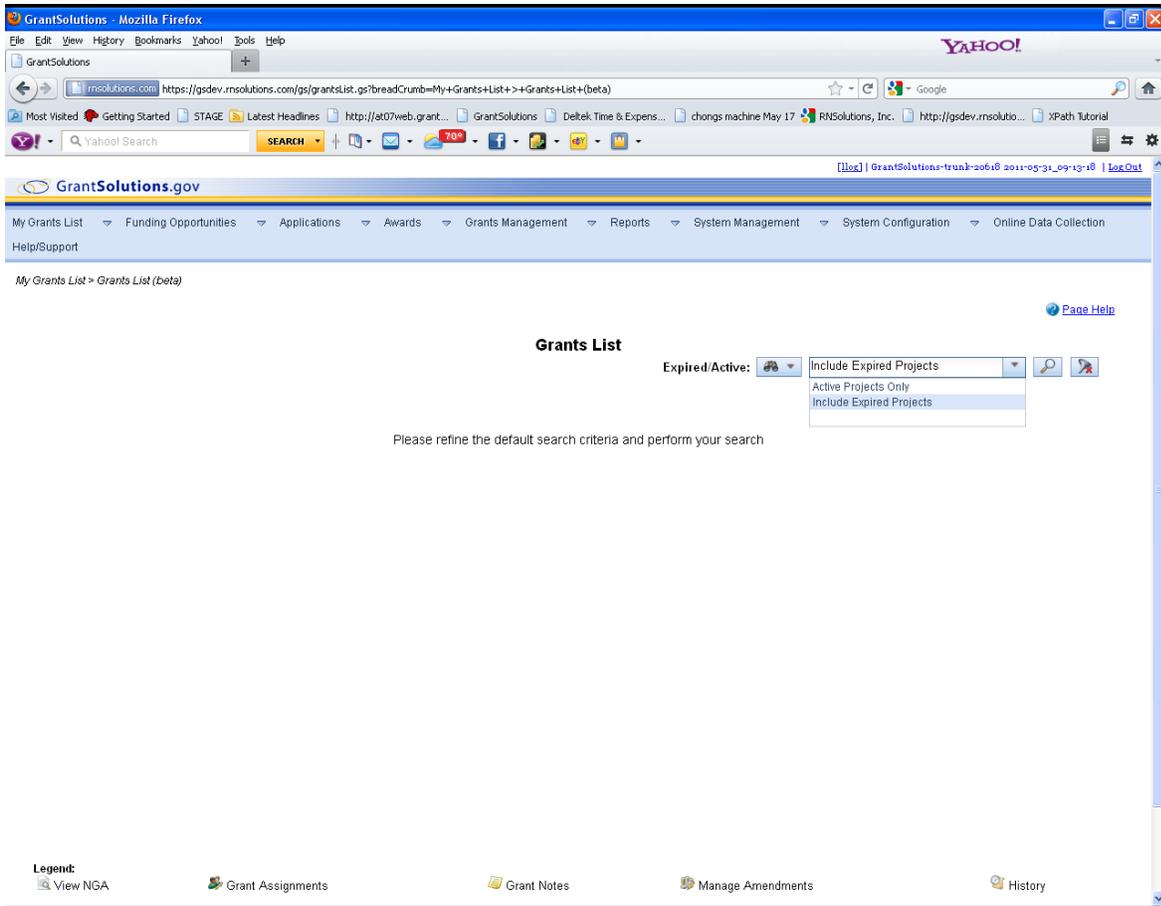
Action Code	Action Name	Prior Approval Required	Federal Action Only	Requested Amount is for New Money	Closeout Grant	Active	Action Scope	Suppress Global Action	Actions
1	Administrative/Supplement Increase (test)	N	N	Y	N	N	Partner		Edit Partner UnDelete Partner
6	Budget Revision	N	N	Y	N	Y	Partner		Edit Partner Delete Partner
6	NGA Revision	N	N	Y	N	Y	Partner		Edit Partner Delete Partner
9	Administrative/Supplement Increase	N	N	Y	N	Y	Partner		Edit Partner Delete Partner
9	Budget Revision	N	N	Y	N	N	Partner		Edit Partner UnDelete Partner
9	CLOSE OUT(partner)	N	N	N	Y	N	Partner		Edit Partner UnDelete Partner

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Navigate to another screen as desired, by selecting from the main menu.

III. Perform Closeout Action from Manage Amendment screen.

As a Grants Management Specialist or Grants Management Officer navigate to the Manage Amendment screen by searching for Expired Grant Projects.



Click on the Manage Amendments icon (second in from the left.)

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https://gsdev.rnsolutions.com/gs/grantsList.gs?breadCrumb=My+Grants+List+>+Grants+List+(beta)

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Default / Selected Search Criteria

Assignment Type My Grants

Assignment Type: My Grants Expired/Active/Include Expired Projects

Search Inside Grid Hide Columns

1 - 25 of 48 items								
	Program Office	Grant Program	Grant Number	Organization	Project Period Start Date	Project Period End Date	Amendment Status	Actions
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0070	Orange-testing	03/03/2011	08/05/2011	Multiple Amendments In-Progress	   
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0069	Orange-testing	03/03/2011	08/05/2011	No Existing Amendments	   
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0068	Orange-testing	03/03/2011	08/05/2011	Multiple Amendments In-Progress	   
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0067	Orange-testing	03/03/2011	08/05/2011	No Existing Amendments	   
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0066	Orange-testing	03/03/2011	08/05/2011	No Existing Amendments	   
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0065	Orange-testing	03/03/2011	08/05/2011	No Existing Amendments	   

Manage Assignments

Legend:  View NGA  Grant Assignments  Grant Notes  Manage Amendments  History

https://gsdev.rnsolutions.com/gs/servlet/grantlist.manageamendments.ManageAmendmentsListServlet?project_id=141703&close_url=/gs/grantsList.gs?search_action=session_search&First_Visit=Y

Arrive at the Manage Amendments screen. Click the New button.

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https://gsdev.rnsolutions.com/giservlet/grantlist.manageamendments.ManageAmendmentsListServlet?project_id=141683&close_url=/gr/...

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Manage Amendments

Grant Number: 11BR0066
 Grantee Name: Orange-testing
 Project Title: Orange 2
 Project Start Date: 03/03/2011
 Project End Date: 08/05/2011
 Last Issued NGA: 08/26/2011 [\[View NGA\]](#)

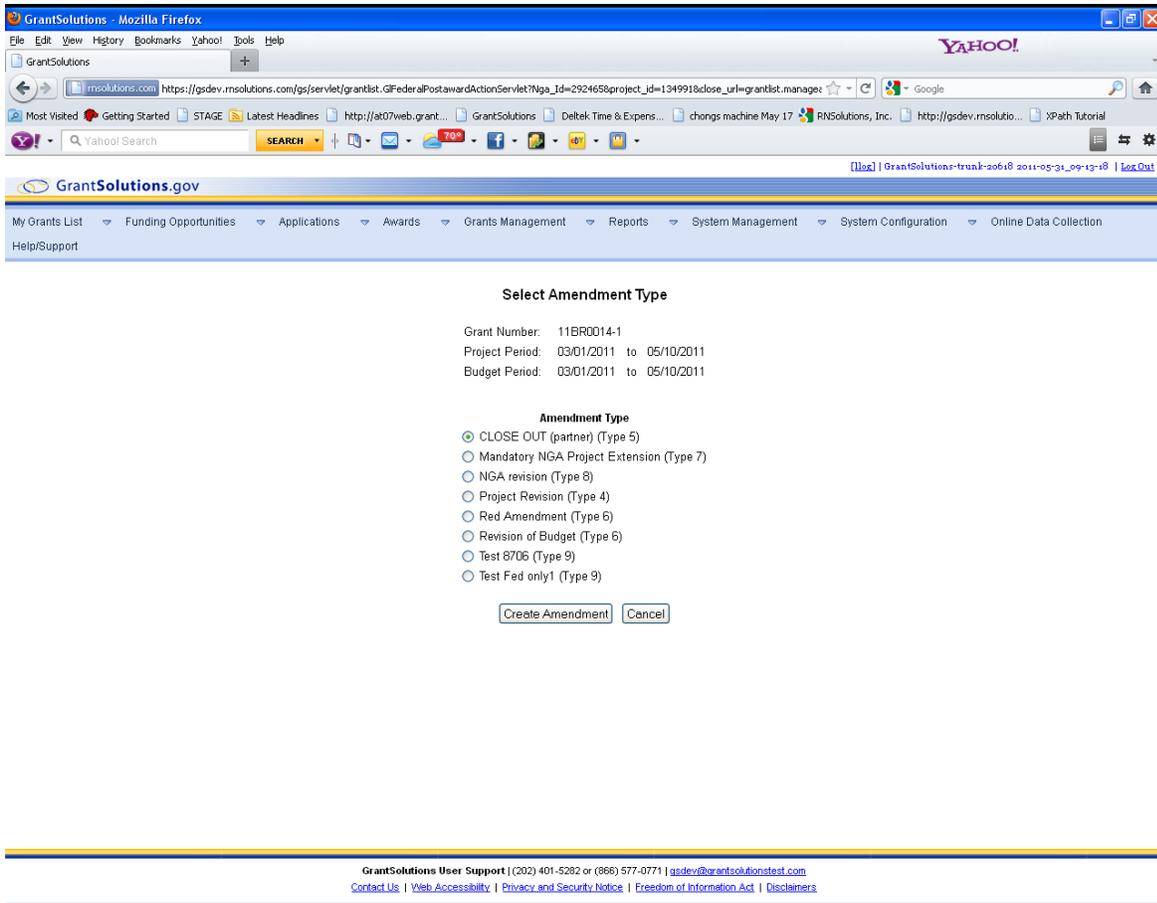
Amendment #	Status	Submitted Date	Type	Budget Period	Funds Requested	Funds Approved	Funding Memo Required	Funding Memo Status	Action
(There are no Amendments found for this Grant.)									

[New](#) [Close](#)

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Done

Select Closeout (partner) and click on the Create Amendment button.



System will navigate to the GrantSolutions Amendment Application Control Checklist screen.

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https://gsdev.rmsolutions.com/giservlet/eacc.post.EACCInProgressServlet?Nga_Id=2946488E_Submission_Flag=Nbclose_url=grantlist.me

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Page Help

GrantSolutions Amendment Application Control Checklist

Post Award Action: CLOSE OUT (partner)

Received (Post Award Paper Submission)

This is your GrantSolutions Application Control Checklist (EACC). You will use the EACC to track the status of your application.

To complete your application electronically, enter information by using the online forms and/or adding attachments (upload/mail-in). Required items are noted by the exclamation point image. If an enclosure has not been verified, a red 'X' image is displayed.

Print Application: [Original Submission](#)

Applicant: Orange-testing
 Grant Number: 11BR0066
 Application Number: (To be assigned) 
 Action: CLOSE OUT (partner)
 Project Title: Orange 2

Information for the Applicant			
davids	Enter Online	N/A	

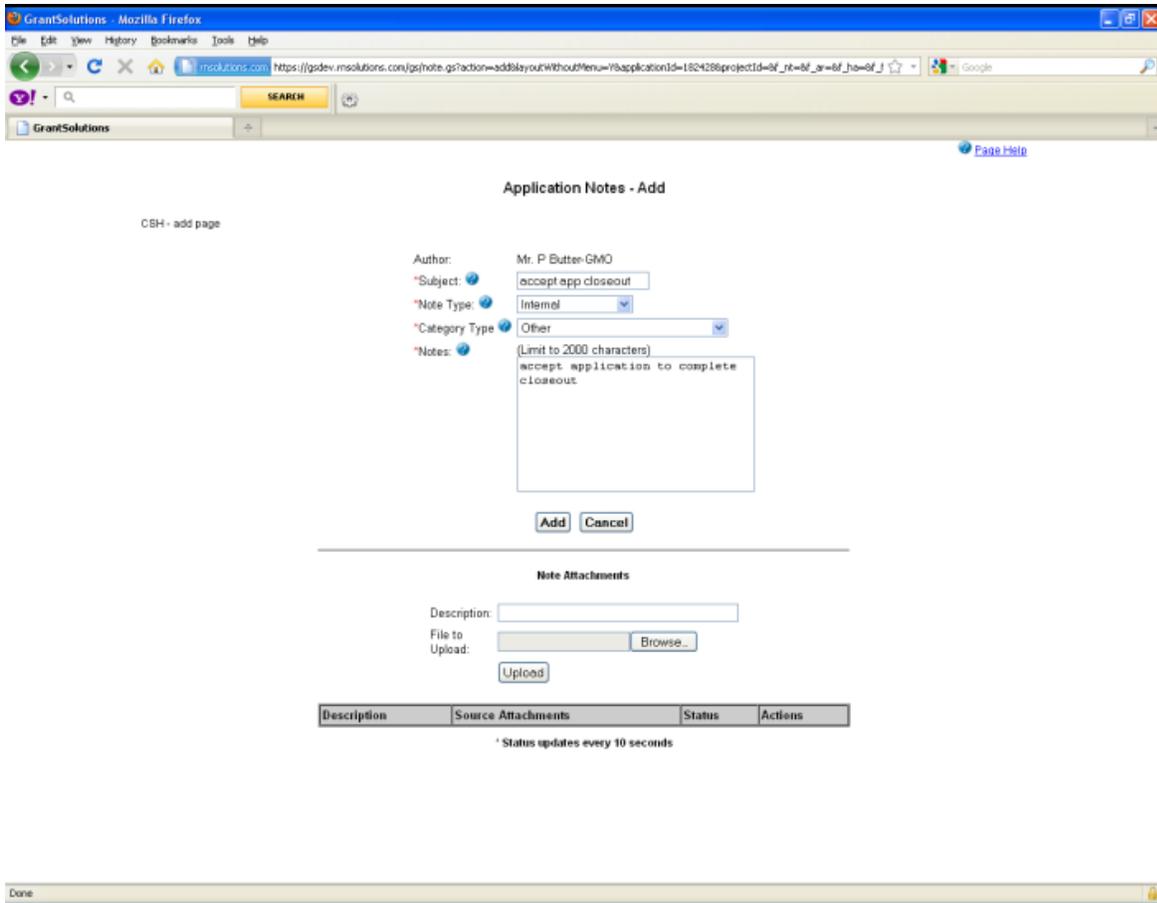
Amendment Package Status: Received (Post Award Paper Submission)

[Application Notes](#) [Verify Submission](#) [Close](#)

Submission Notice:

GrantSolutions does not hold any responsibility for data loss prior to your submission. Your electronic submission components will be confirmed by an on-line acknowledgement and you will also receive an acknowledgement of receipt by regular postal mail when all mail-in attachments of the application package have been received. Please be aware that even if you submit the electronic portion of your application, GrantSolutions will NOT consider your application complete unless GrantSolutions receives all the required attachments by the due date requirements specified in the grant announcement.

Add Application Notes (as appropriate) by clicking on the Application Notes which will navigate to the application Notes screen.



Click the Add button to add the application notes then click the Cancel button to return to the GrantSolutions Amendment Application Control Checklist.

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https://gsdev.rnsolutions.com/gsjervlet/eacc.post.EACCInProgressServlet?Application_Id=182428

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[Butter:GMO] | GrantSolutions-trunk-22703 2011-09-09_13-23-04 | [Log Out](#)

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GrantSolutions Amendment Application Control Checklist

Post Award Action: CLOSE OUT (partner)

Received (Post Award Paper Submission)

This is your GrantSolutions Application Control Checklist (EACC). You will use the EACC to track the status of your application.

To complete your application electronically, enter information by using the online forms and/or adding attachments (upload/mail-in). Required items are noted by the exclamation point image. If an enclosure has not been verified, a red 'X' image is displayed.

Print Application: [Original Submission](#)

Applicant: Orange-testing
 Grant Number: 11BR0066
 Application Number: (To be assigned)
 Action: CLOSE OUT (partner)
 Project Title: Orange 2

Information for the Applicant			
dauids	Enter Online Print Completed	N/A	✓

Amendment Package Status: Received (Post Award Paper Submission)

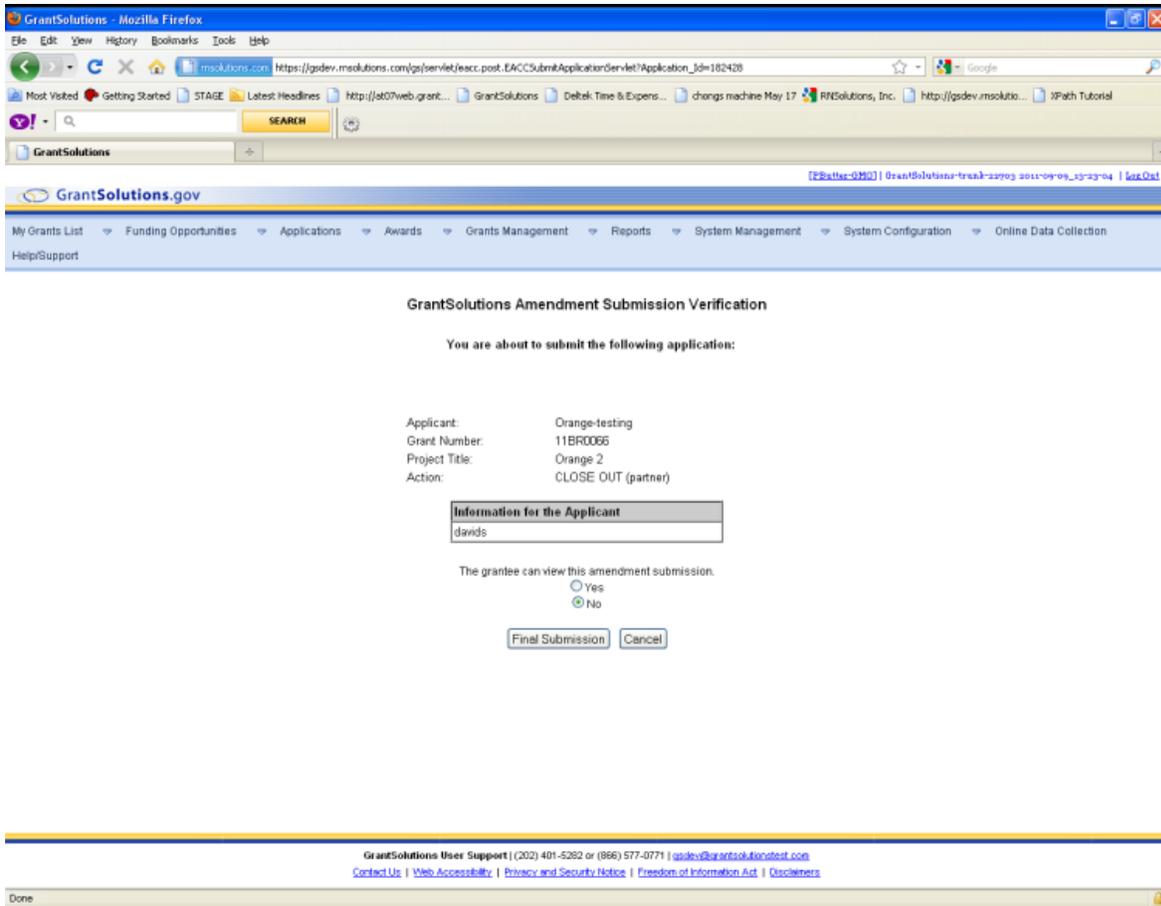
[Application Notes](#) [Verify Submission](#) [Close](#)

Submission Notice:

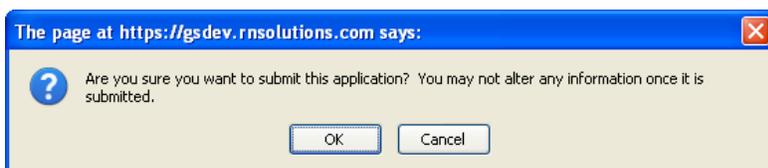
GrantSolutions does not hold any responsibility for data loss prior to your submission. Your electronic submission components will be confirmed by an on-line acknowledgement and you will also receive an acknowledgement of receipt by regular postal mail when all mail-in attachments of the application package have been received. Please be aware that even if you submit the electronic portion of your

Done

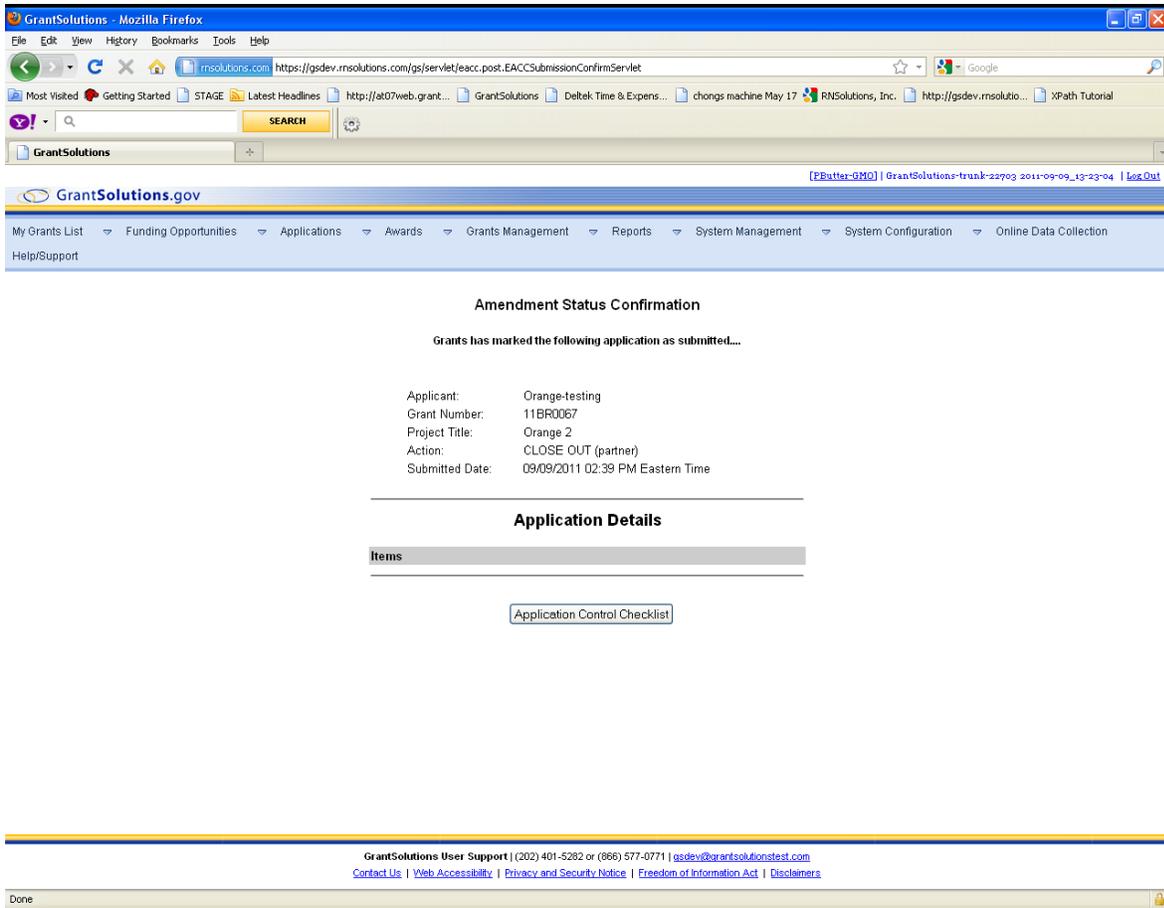
Click the Verify Submission button, which will display the GrantSolutions Amendment Submission Verification screen. Click the Final Submission button.



Click the Final Submission button—a confirmation pop up will display “Are you sure you want to submit this application? You may not alter any information once it is submitted.”



Click the OK button. Displayed will be the Amendment Status Confirmation screen.



Click on the Verify Completion button, which will display the GrantSolutions Amendment completion Verification screen. Click on the Final Completion button.

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https://gsdev.rmsolutions.com/giservlet/eacc.post.EACCCompleteApplicationServlet?Application_Id=182429

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GrantSolutions Amendment Completion Verification

You are about to update the status of the following application to "complete":

Applicant: Orange-testing
 Grant Number: 11BR0067
 Project Title: Orange 2
 Action: CLOSE OUT (partner)
 Submitted Date: 09/09/2011 02:39 PM Eastern Time

Information for the Applicant

***davids

*** It appears from what you have entered that your application is not complete. To correct, press the "Cancel" button to return to the Application Control Checklist.

Mail-In Package Information: Peanut Butter does not expect to receive a mail-in package for this application.

Final Completion Cancel

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Done

Displayed will be the Manage Amendments screen.

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Help/Support

Manage Amendments

Grant Number: 11BR0069
 Grantee Name: Orange-testing
 Project Title: Orange 2
 Project Start Date: 03/03/2011
 Project End Date: 08/05/2011
 Last Issued NGA: 08/29/2011 ([View NGA](#))

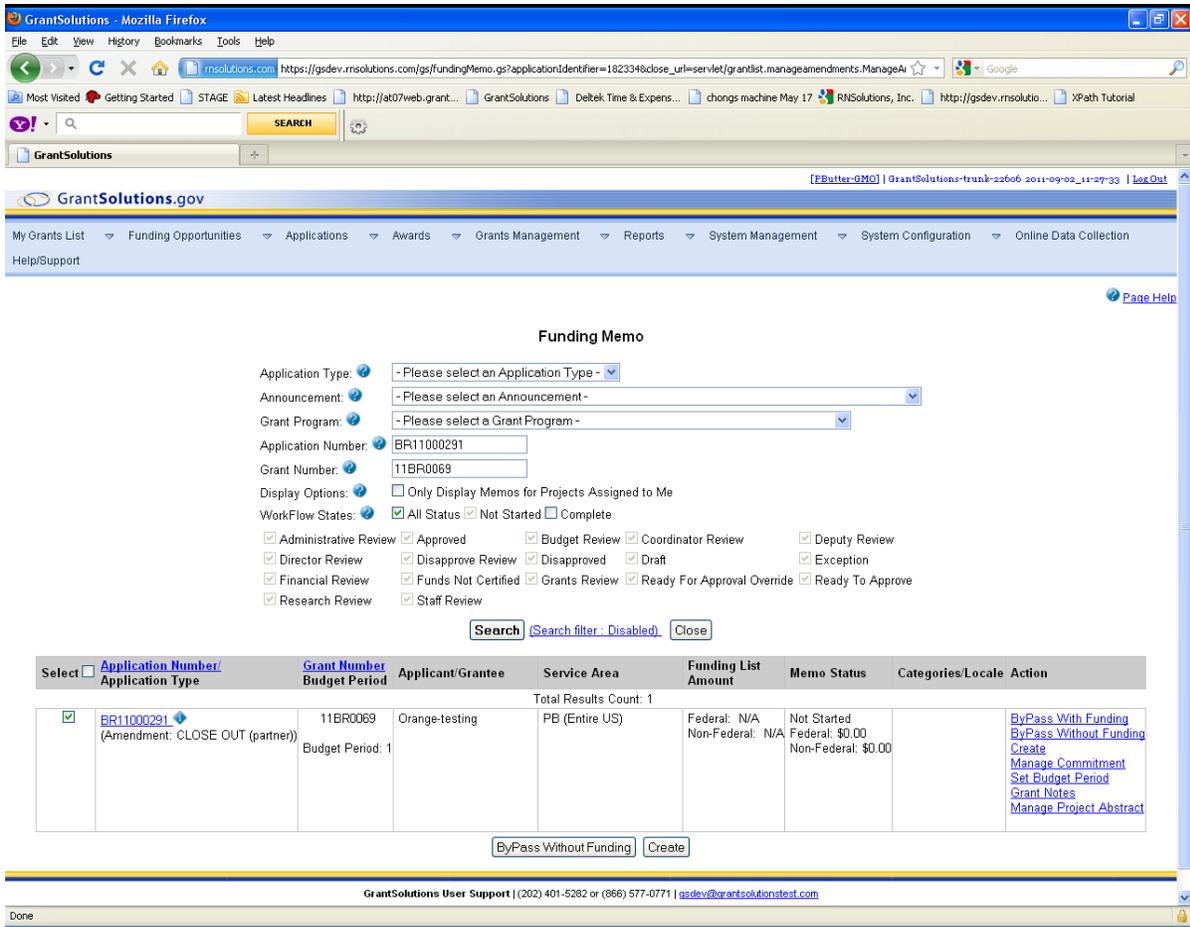
Amendment #	Status	Submitted Date	Type	Budget Period	Funds Requested	Funds Approved	Funding Memo Required	Action
							Funding Memo Status	
BR11000291	Complete (Post Award)	09/06/2011 10:34:43 AM	CLOSE OUT (partner)	1 03/03/2011 - 08/05/2011	N/A	N/A	No N/A	View Amendment Disapproval Process Memo Set Budget Period Budget Worksheet Grant Notes History Send Message

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Done

Select the Post Award Amendment by completing the checkbox under the Select column if there is more than one amendment displayed on the screen.

To process the Funding Memo click on the "Process Memo" link. The user may ByPass Without Funding or create the Funding Memo. If the user creates the Funding Memo the standard review and approval process will presented to the user.



From the ByPass Without Funding link the user will see displayed the Funding Memo screen.

After completing the checkbox under the Select column, Click on the Generate button or Generate link under the Action column.

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Page Help

Funding Memo

Application Type:

Announcement:

Grant Program:

Application Number:

Grant Number:

Display Options: Only Display Memos for Projects Assigned to Me

WorkFlow States: All Status Not Started Complete

Administrative Review Approved Budget Review Coordinator Review Deputy Review

Director Review Disapprove Review Disapproved Draft Exception

Financial Review Funds Not Certified Grants Review Ready For Approval Override Ready To Approve

Research Review Staff Review

Select	Application Number/ Application Type	Grant Number Budget Period	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	NGA Status	Categories/Locale	Action
Total Results Count: 1									
<input type="checkbox"/>	BR11000303 (Amendment: CLOSE OUT (partner))	11BR0067 Budget Period: 1	Orange-testing	PB (Entire US)	Federal: N/A Non-Federal: N/A	Approved Federal: \$0.00 Non-Federal: \$0.00	Ready to Generate		History Manage Commitment Set Budget Period View Grant Notes Manage Project Abstract Disapprove Generate

Disapprove Generate

Done

The confirmation screen that a draft Notice of Grant Award was generated will be displayed. Click the Close button.

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https://gsdev.rnsolutions.com/ga/servlet/postaward.nga.GenerateDraftNgaServlet?generateSingle=Y&close_url=/gs/fundingMemo.gs&Appl

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Generated Draft NGA(s)

GrantSolutions Generated Draft NGAs for the following application(s):

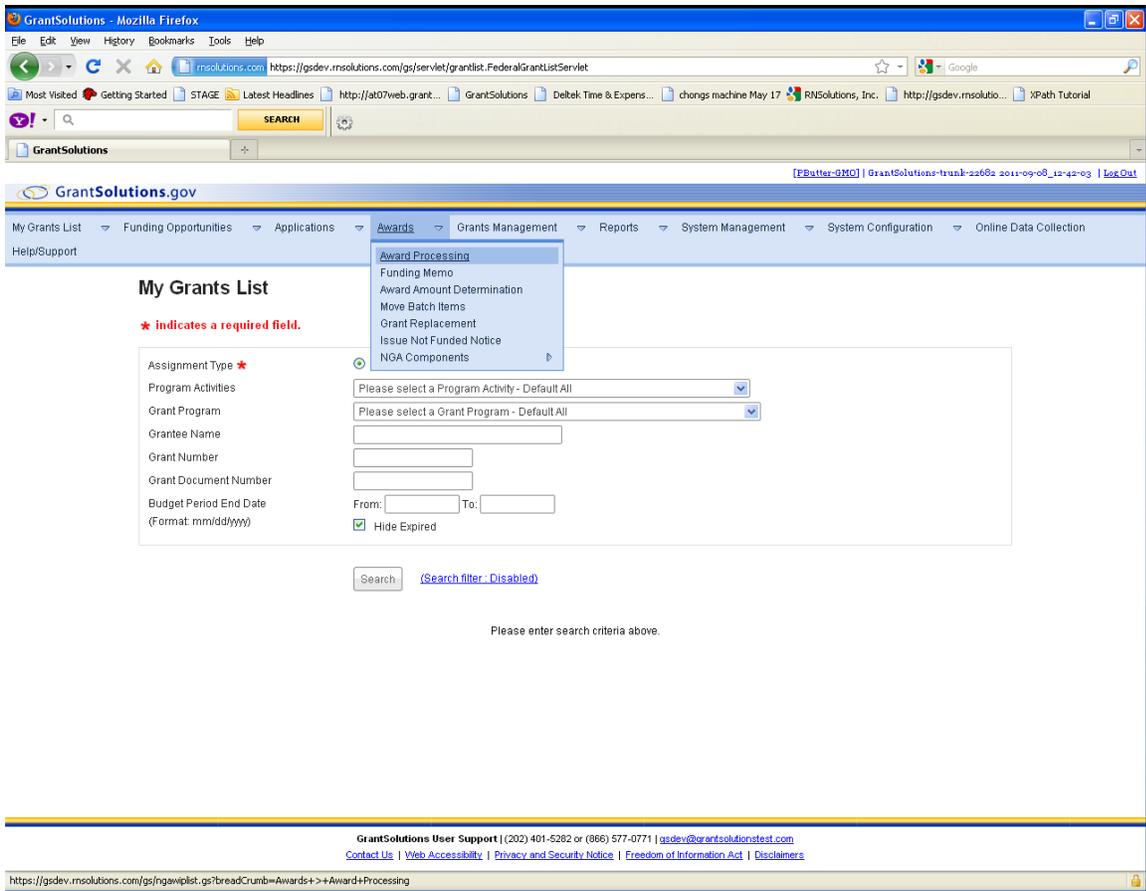
Grant Number	Grantee Name	Budget Start Date	Budget End Date	Application Number
11BR0069-01-01	Orange-testing	03/03/2011	08/05/2011	BR11000281

Please go to [NGA - In Process/Draft](#) to find grant and edit.

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Done

Go to the main menu. Awards > Award Processing.



Displayed will be the Award List. Perform Search by clicking the Search button.

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Awards > Award Processing

Award List

Application Type:

Announcement:

Grant Program:

Processing Cycle:

NGA Status:

Application Number:

Grant Number:

Grantee Name:

Budget Cycle: Year: Qtr: Dates: Begin: End:

Please enter search criteria above.

No NGAs found for your search criteria.

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Results will be displayed on the Award List.

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Awards > Award Processing

Page Help

Award List

Application Type: -Please Select an Application Type-
 Announcement: -Please Select an Announcement-
 Grant Program: -Please Select a Grant Program-
 Processing Cycle: Batch-
 NGA Status: All Status-
 Application Number:
 Grant Number:
 Grantee Name:
 Budget Cycle: Year: Qtr: 1 Dates: Begin: End:

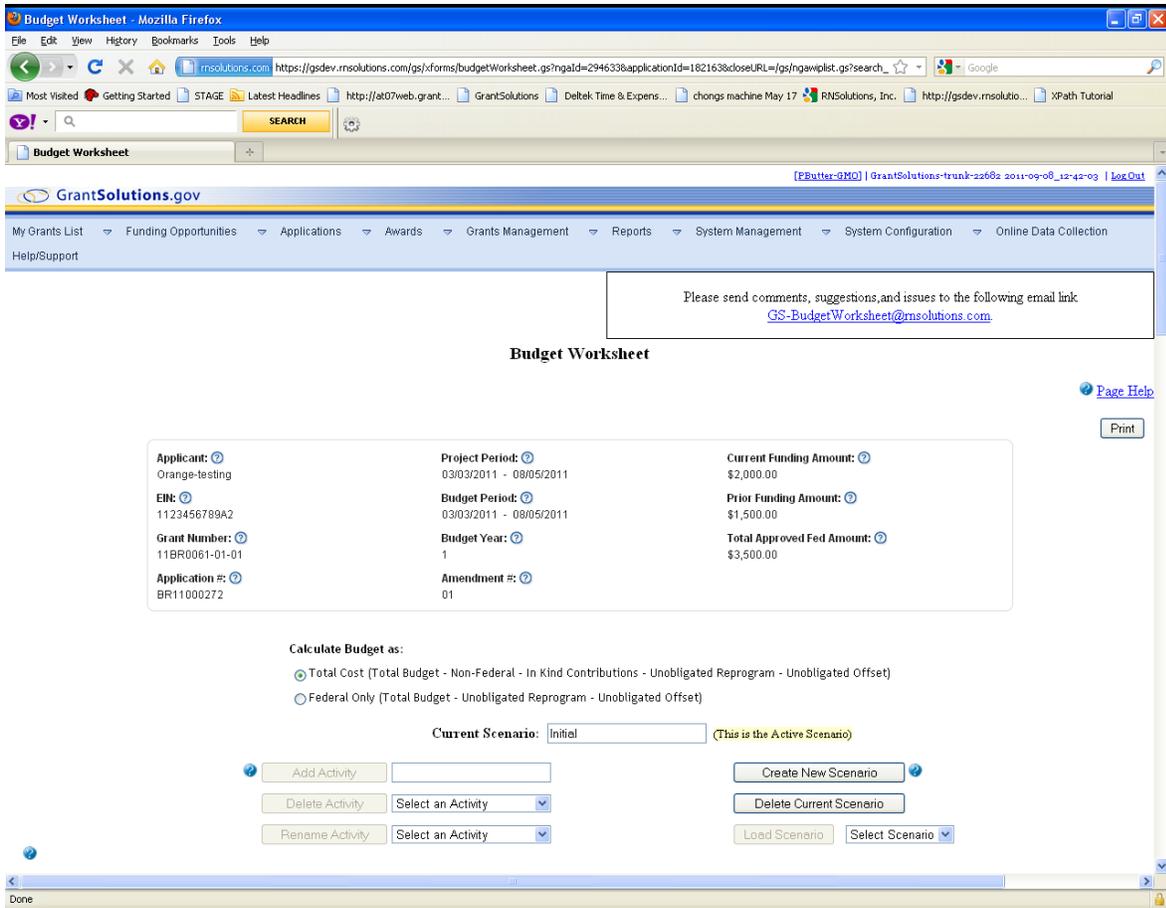
Search

Please enter search criteria above.

Select	Grantee Name	Grant Number	Total Approved	Application # Application Type Funding Level Application Notes	Budget Start Date	Budget End Date	Last Updated By/Date	Workflow Status	Change Workflow Status	Action
	Orange-testing	11BR0061-01-01 Support Year: 1 Revision Num: 1	\$2,000	BR11000272 NGA revision \$2,000 View Print Approval Memo Application Notes	03/03/2011	08/05/2011	P Butler-GMO / 08/26/2011	Drafted History	Ready for Approval	Edit Delete View/Print View Last NGA Organization Select Org Address Grant Assignments Budget Worksheet Terms and Conditions View History Award Summary Manage Project Abstract Manage Commitment
	UDOC -ORANGE	10BR0022-01-02 Support Year: 1 Revision Num: 2	\$0	BR11000230 NGA revision \$0 View Print Approval Memo Application Notes	10/01/2010	05/31/2013	Aqua type3-gmo / 08/12/2011	Drafted History	Ready for Approval	Edit Delete View/Print View Last NGA Organization Select Org Address Grant Assignments Budget Worksheet Terms and Conditions View History Award Summary Manage Project Abstract Manage Commitment
Done										Edit Delete

Locate the grant. From the Award List, under the Action column click on the link to Budget Worksheet.

Displayed will be the Budget Worksheet screen.



Scroll down to the Direct Cost grid. Enter any deobligation amount under the Recommended column. It is suggested that any deobligation amount be entered in the OTHER line item.

Budget Worksheet - Mozilla Firefox

File Edit View History Bookmarks Tools Help

msolutions.com https://gsdev.rnsolutions.com/gs/xforms/BudgetWorksheet.gs?ngaid=294753&applicationId=182334&closeURL=/gs/ngawiplist.gs?search_

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SEARCH

Budget Worksheet

Panel: Buler Research Overage ACF/OFA

Direct Cost (Panel: Buler Research Overage ACF/OFA)

Category	Final Budget	Requested Agency Adjusted Requested	Adjustment	Recommended	Total	Non-Federal	Federal	Unallocated Balance
Personnel	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fringe Benefits	1,700.00	-1,700.00	1700.00	0.00	1,700.00	0.00	1,700.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contractual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Construction	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other	0.00	0.00	-500.00	-500.00	-500.00	0.00	-500.00	0.00
Total Direct	1,700.00	-1,700.00	1,200.00	-500.00	1,200.00	0.00	1,200.00	0.00
Indirect	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Grand Total:	1,700.00	-1,700.00	1,200.00	-500.00	1,200.00	0.00	1,200.00	0.00

Indirect Cost (Panel: Buler Research Overage ACF/OFA)

Description	Method	Base	Rate %	Month	Recommended	Total	Non-Federal	Federal	Total Project Amount	% Total Project Amount
1 - Indirect	Hourly	0.00		12	0.00	0.00	0.00	0.00	1,200.00	0.0
Total:					0.00	0.00	0.00	0.00	1,200.00	0.0

Done

Category	Previous Budget	Requested		Adjustment	Recommended	Total	Non-Federal	Federal	Unobligated Balance
		Agency Adjusted Requested							
Personnel	100.00	0.00	0.00	0.00	0.00	100.00	0.00	100.00	0.00
Fringe Benefits	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contractual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Construction	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other	0.00	0.00	0.00	-33.00	-33.00	-33.00	0.00	-33.00	0.00
Total Direct	100.00	0.00	0.00	-33.00	-33.00	67.00	0.00	67.00	0.00
Indirect	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Grand Totals	100.00	0.00	0.00	-33.00	-33.00	67.00	0.00	67.00	0.00

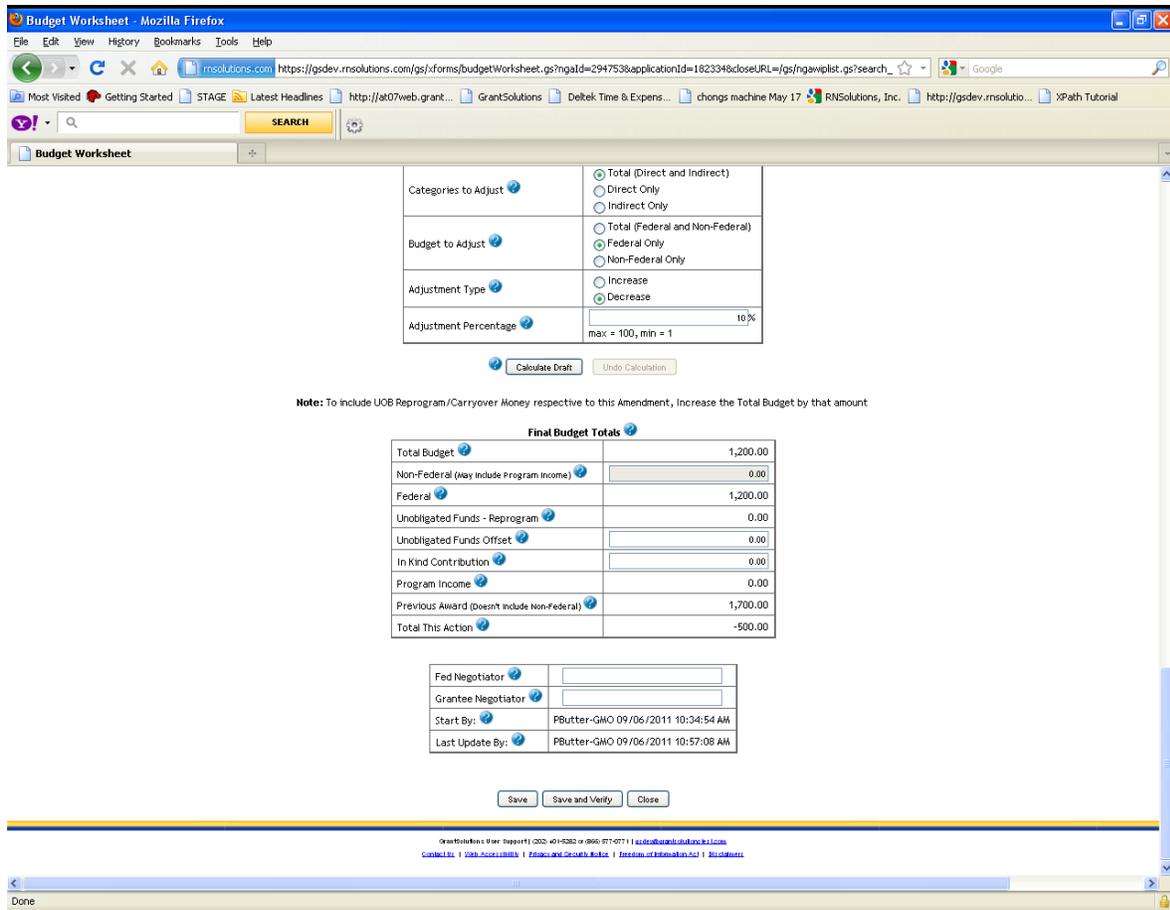
Scroll down the Budget Worksheet screen.

Displayed is the Full Budget Adjustment calculation and the Final Budget Totals.

The Final Budget Totals grid displays the Total of the current action. For a deobligation closeout, Total This Action must be a negative amount.

Scroll further down the screen and click the Save and Verify button. Any Warnings or Errors will be displayed.

Next click the Close button.



The system brings the user to the Award List.

Click the EDIT Action link to edit the Notice of Grant Award. Under the Financial Information section, enter any deobligation amount as a negative number into the New Amount column. If there is more than one award displayed, a zero must be entered if there is not s deobligation amount from that Financial Account.

21. APPLICANT EIN:
271944615

22. PAYEE EIN:
PMS EIN 1123456789A2 Vendor (code: 1123456789A2) has been verified.
 Please select this box if you wish to bypass EIN verification for this award. The selected Vendor's code is 1123456789A2

23. OBJECT CLASS:
40.45 - Orange T-3 ACF

24. FINANCIAL INFORMATION:
 Do not send transaction to accounting system.

ORGN	DOCUMENT NO.	APPROPRIATION	FINANCIAL ACCOUNT NO.	NEW AMT.	UNOBLIG	NONFED %	Treasury Account Symbol Account Code	Treasury Account Symbol Sub-Account Code
	11BR0068A1	1234	1-G999991	\$ -500.00 .00			0001	
	11BR0068A2	1234	1-G999991	\$ 0.00 .00			0001	
	11BR0068A3	1234	1-G999991	\$ 0.00 .00			0001	

25. REMARKS:
This is a Closeout action.

26. SIGNATURE - ACF GRANTS OFFICER:
Title:

27. SIGNATURE(S) CERTIFYING FUND AVAILABILITY

28. SIGNATURE AND TITLE - PROGRAM OFFICIAL(S):
DATE (MM/DD/YYYY):

ByPass Central Contractor Registration Validation
 Please select this box if you wish to bypass Central Contractor Registration Validation for this award.

Funding Transparency Act Award Recipient Information:

Funding Transparency Act Award Project & Award Information:

Funding Transparency Act Award Principal Place Of Performance Information:

Award Notification:

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PLEASE NOTE the following on the Notice of Grant Award:

Number 24.

Within Number 24, Financial Information section of the draft Notice of Grant Award, there is a checkbox labeled DO NOT SEND TRANSACTION TO ACCOUNTING SYSTEM. When checked, the system will NOT send a financial transaction to PMS, and will close the grant in GrantSolutions only.

If more than one financial account is displayed and funds are being deleted from one financial account, the other displayed account requires the entering of zero under the New Amount column.

Number 25.

Remarks section of the draft Notice of Grant Award will pre-populate with “This is a Closeout action.” when it is a closeout amendment.

Click on the Save and Verify button.

Ready for Approval link under the Change Workflow Status may be checked. Proceed with standard approval workflow.

For a detailed user guide on amendments go to:

<https://www.grantsolutions.gov/cf/display/FedUsers/Home> and click on Processing Amendments Version 3.13 pdf document.

IV. Establish Closeout Checklist

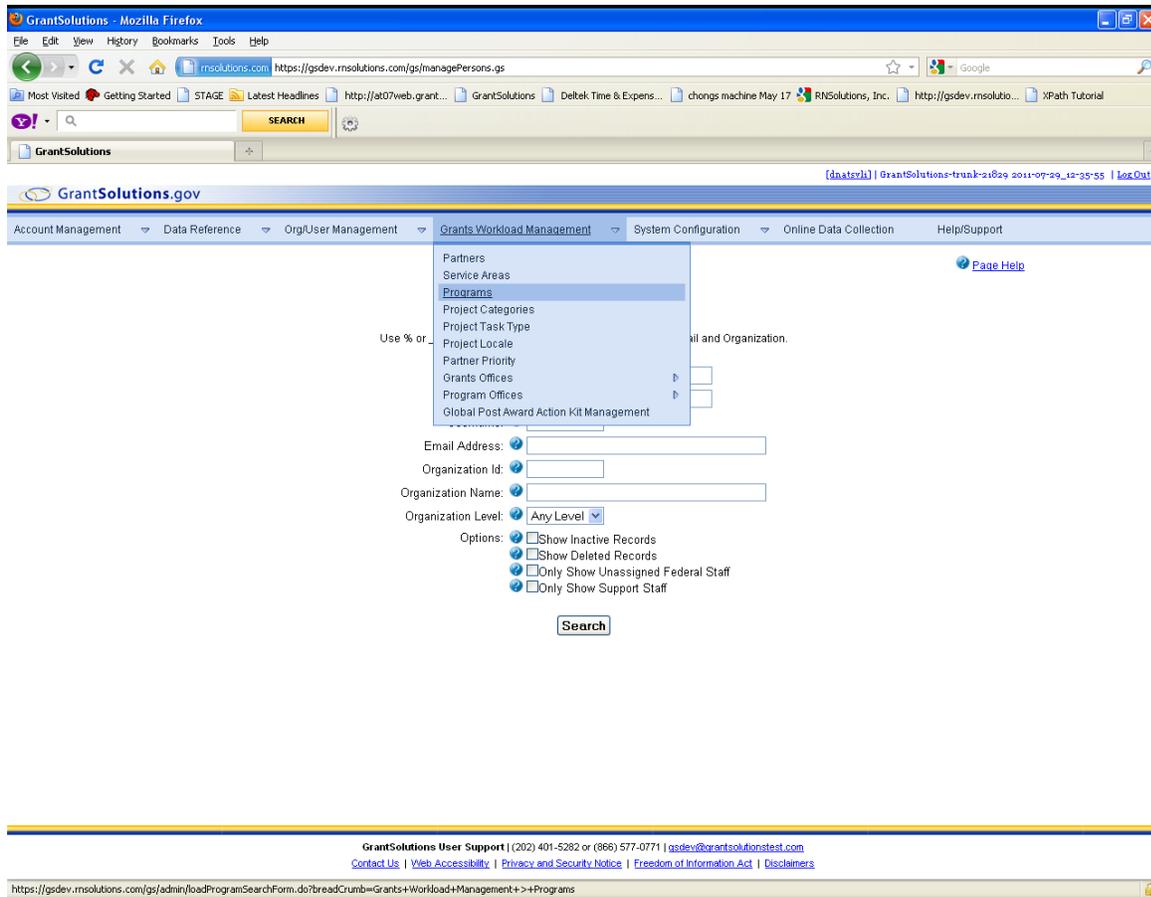
SET UP

NOTE: After the first Grant Checklist is established for a grant program, a Grant Checklist will always be required for that particular Grant Program. A Program Checklist is always optional.

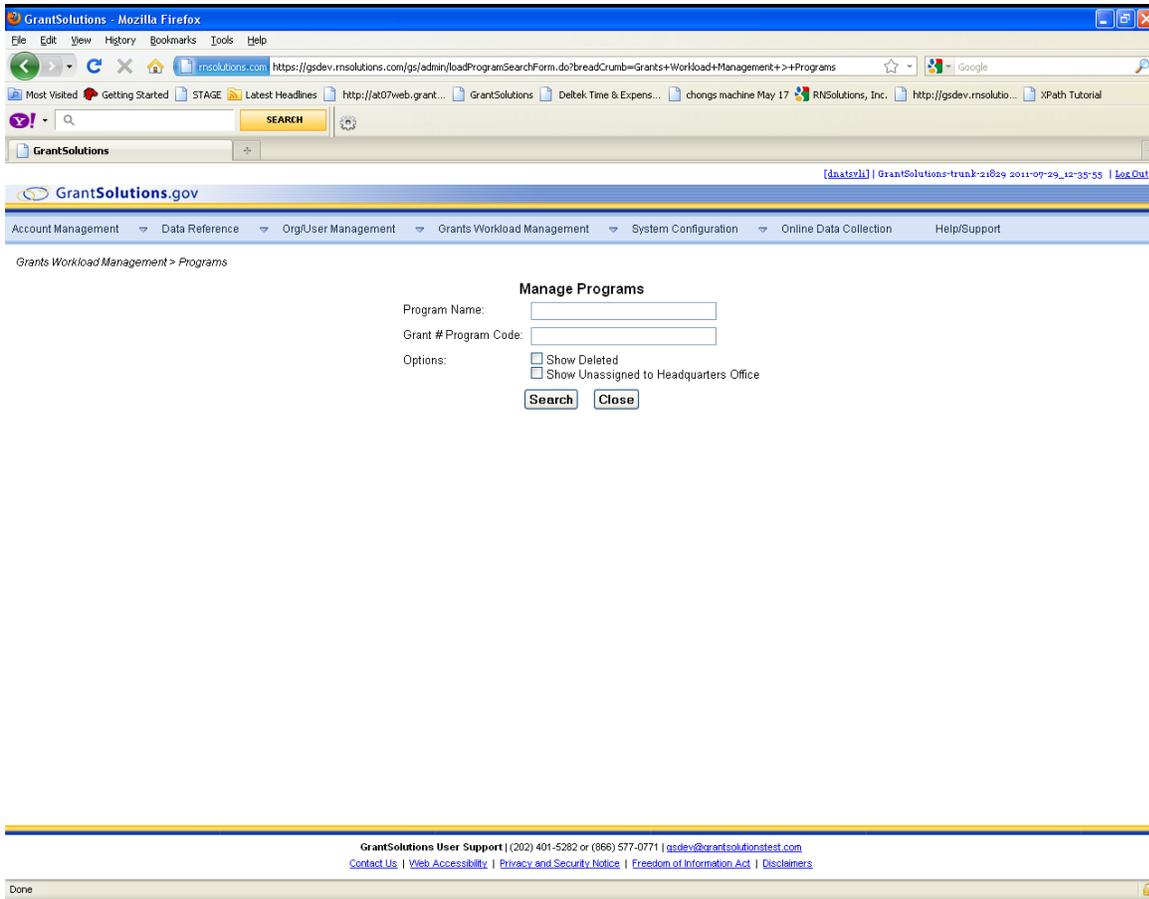
Administrator authority may establish Closeout Checklists for either the Grants Office or the Program Office.

A Grant Office closeout checklist is required to trigger the “Ready to Close” Grants List search filter.

From the main menu, Grants Workload Management > Programs



Search from the Manage Programs screen.



From the Search results displayed, under the Action column, click on the Manage Grant Programs link.

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Account Management | Data Reference | Org/User Management | Grants Workload Management | System Configuration | Online Data Collection | Help/Support

Manage Programs

Program Name:

Grant# Program Code:

Options: Show Deleted
 Show Unassigned to Headquarters Office

Number Of Programs: 74

Name	Grant # Program Code	HQ Office / Location	Active	Program Activities	Grant Programs	CFDA	Action
Toys Planning and Assistance	TIPA	Office of Toys & Games Baltimore, MD	Y	Toys Planning and Assistance (TIP)	Toys Planning and Assistance	0987 96.008 96.009	Manage Grant Programs
Protection of Toys - PURPLE	POFT	Office of Toys & Games Baltimore, MD	Y	Protection of Toys (POT)	Protection of Toys test	93.506 96.009 99.006 96.009	Manage Grant Programs
Toys Research Consortium-Orange T11	RRC	Office of Toys & Games Baltimore, MD	Y	Toys Research Consortium (RRC)	Toys Research Consortium	96.007	Manage Grant Programs
Toys and Games Research Consortium	TAGC	Office of Toys & Games Baltimore, MD	Y	Toys and Games Research Consortium (TAG)	Toys and Games Research Consortium	96.007	Manage Grant Programs
Orange Balls Assistance Red-T1	OBAS	Office of Orange Balls Gaithersburg, MD	Y	Orange Balls Assistance (OBA)	Orange Balls Assistance Red	93.250 96.008 98.25	Manage Grant Programs
Protection of Orange Balls - PURPLE -1	PO	Office of Orange Balls Gaithersburg, MD	Y	Protection of Orange Balls (POB)	Protection of Orange Balls for PURPLE	93.217	Manage Grant Programs
Orange Balls Consortium for ORANGE - T1	OBR	Office of Orange Balls Gaithersburg, MD	Y	Orange Balls Research (OBR)	Orange Balls Research - ORANGE	93.260	Manage Grant Programs
Orange Balls II Consortium for AQUA	OB	Office of Orange Balls Gaithersburg, MD	Y	Orange Balls Consortium (OBB)	Orange Balls Consortium for AQUA	98.511	Manage Grant Programs
Black LCD Assistance Red T6	BLAS	Office of Black LCD Gaithersburg, MD	Y	Black LCD Assistance (BLA)	Black LCD Assistance Red	93.795	Manage Grant Programs
Protection of Black LCD for PURPLE - 6	POBL	Office of Black LCD Gaithersburg, MD	Y	Protection of Black LCD (PBL)	Protection of Black LCD for PURPLE	93.779	Manage Grant Programs
Black LCD	BLR	Office of Black LCD	Y	Black LCD Research (BLR)	Black LCD Research	93.767	Manage Grant Programs

From the Manage Grant Programs screen, under the action column select Manage Questions.

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File Edit View History Bookmarks Tools Help

https://gsdev.rnsolutions.com/gs/admin/loadGrantPrograms.do?programActivityId=2743

GrantSolutions.gov

Account Management Data Reference Org/User Management Grants Workload Management System Configuration Online Data Collection Help/Support

Manage Grant Programs

For Program Activity: Orange Balls Research (OBR)

Number Of Grant Program: 1

Grant Program Name	CFDA Code / Title	TAGGS Activity Type	Active	Review System	Action
Orange Balls Research - ORANGE (DISCRETIONARY)	93.260 - OPHS - " Orange" -1	Social Service	Y	Manual	Edit Workload Administrative Codes Manage Questions

[Back to Programs](#)

Action Notes:

Delete: An operation of delete will mark a delete flag of the record and the record will remain inactive until system administrator make it active.

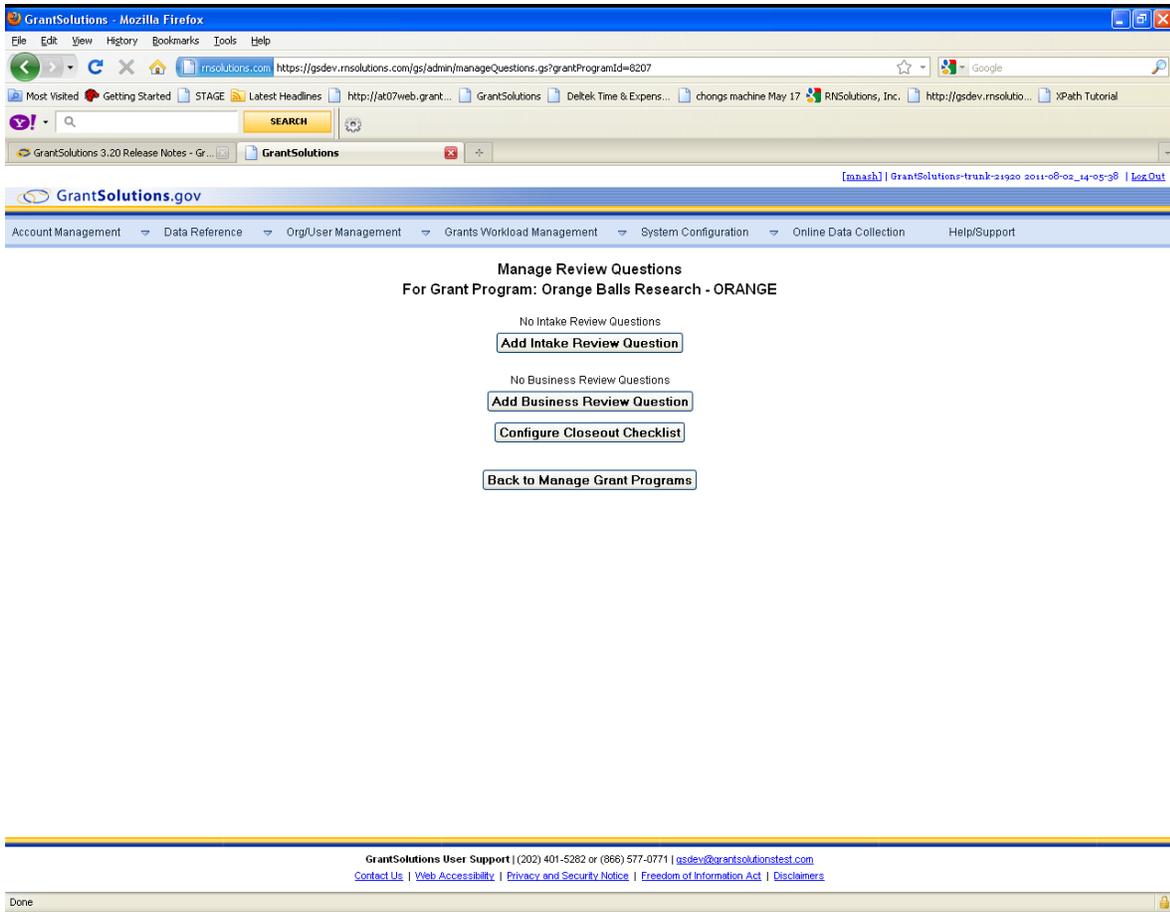
Undelete: An operation of undelete will unmark a delete flag of the record and the record will remain inactive until system administrator make it active.

Remove: An operation of remove will permanently delete a record database. For those records have been used by other tables, please refer back to database administrator.

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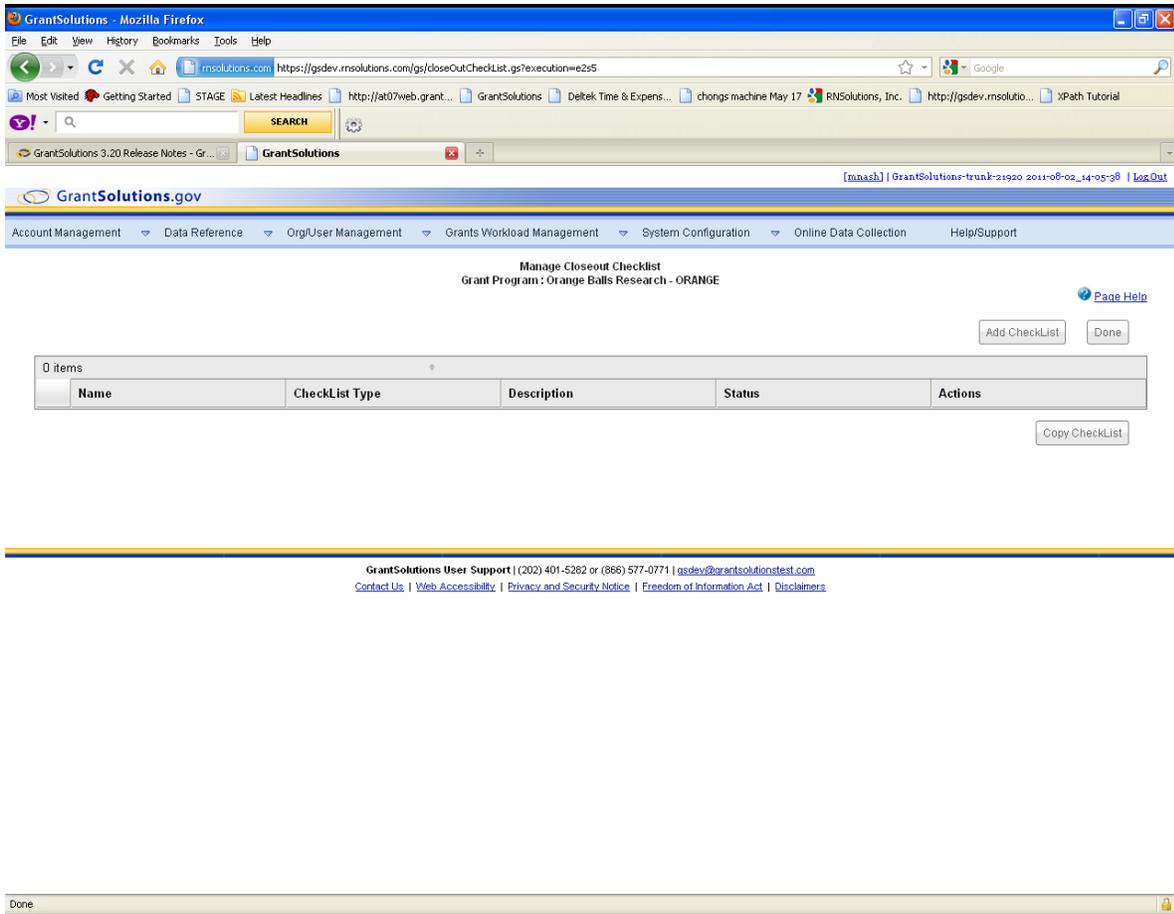
Done

Displayed is the Manage Review Questions screen.

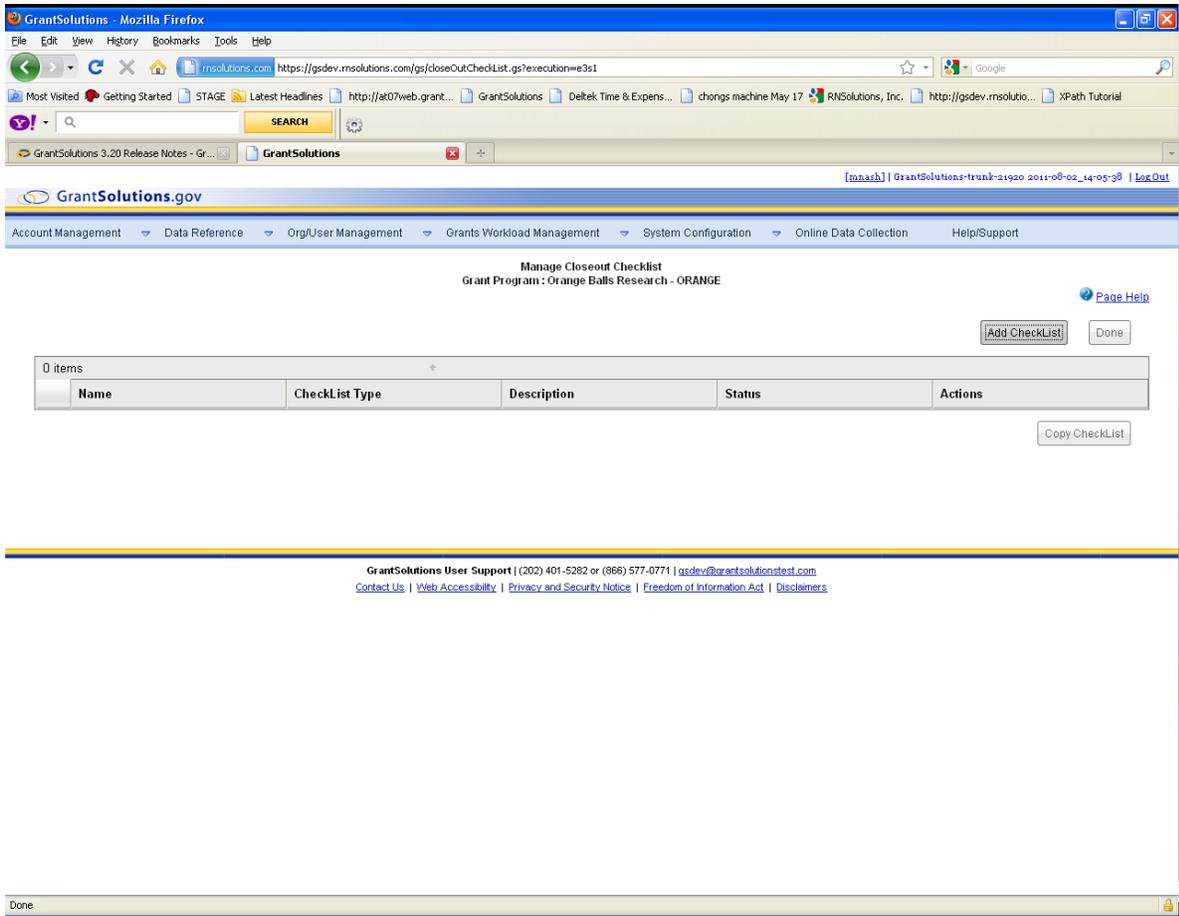


Click on the Configure Closeout Checklist button.

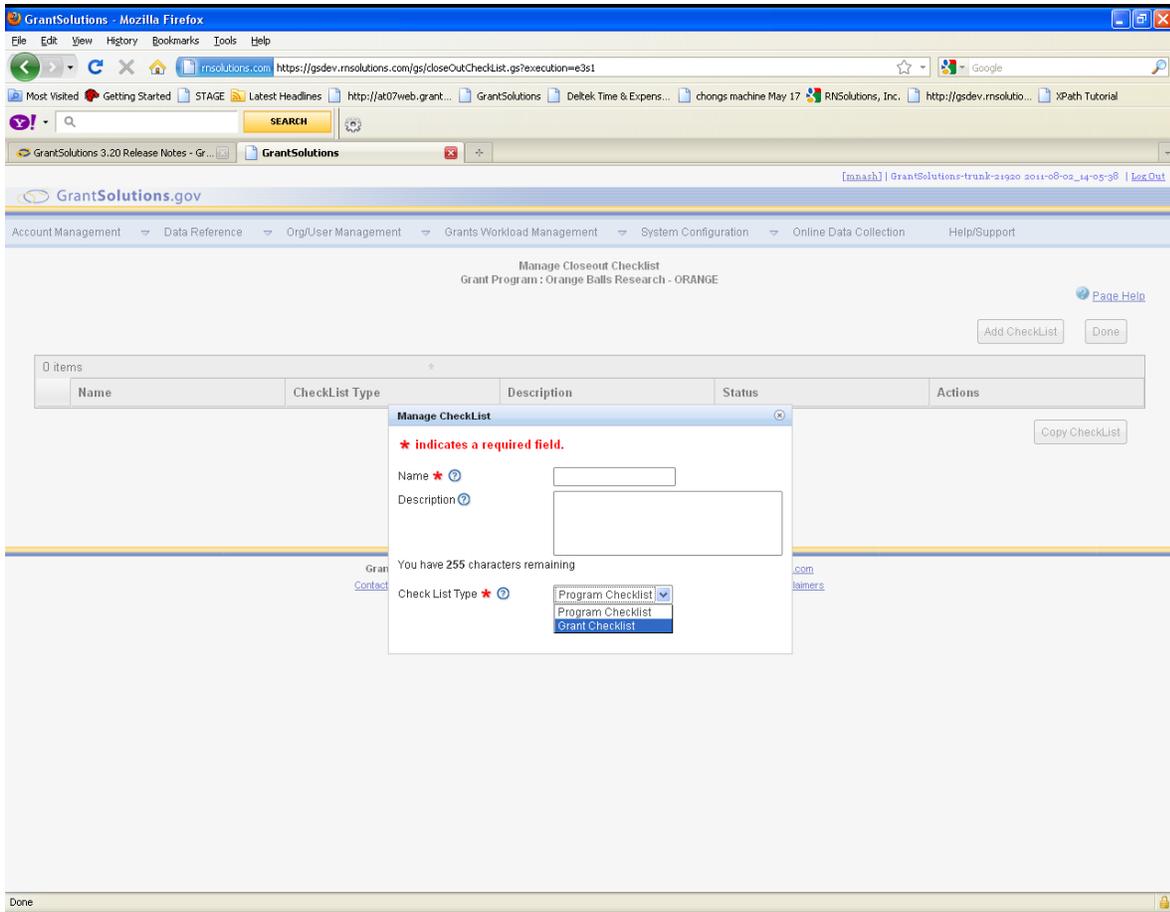
Displayed is the Manage Closeout Checklist screen.



To begin a new Checklist, click the Add Checklist button.



The Manage Checklist pop-up is displayed.

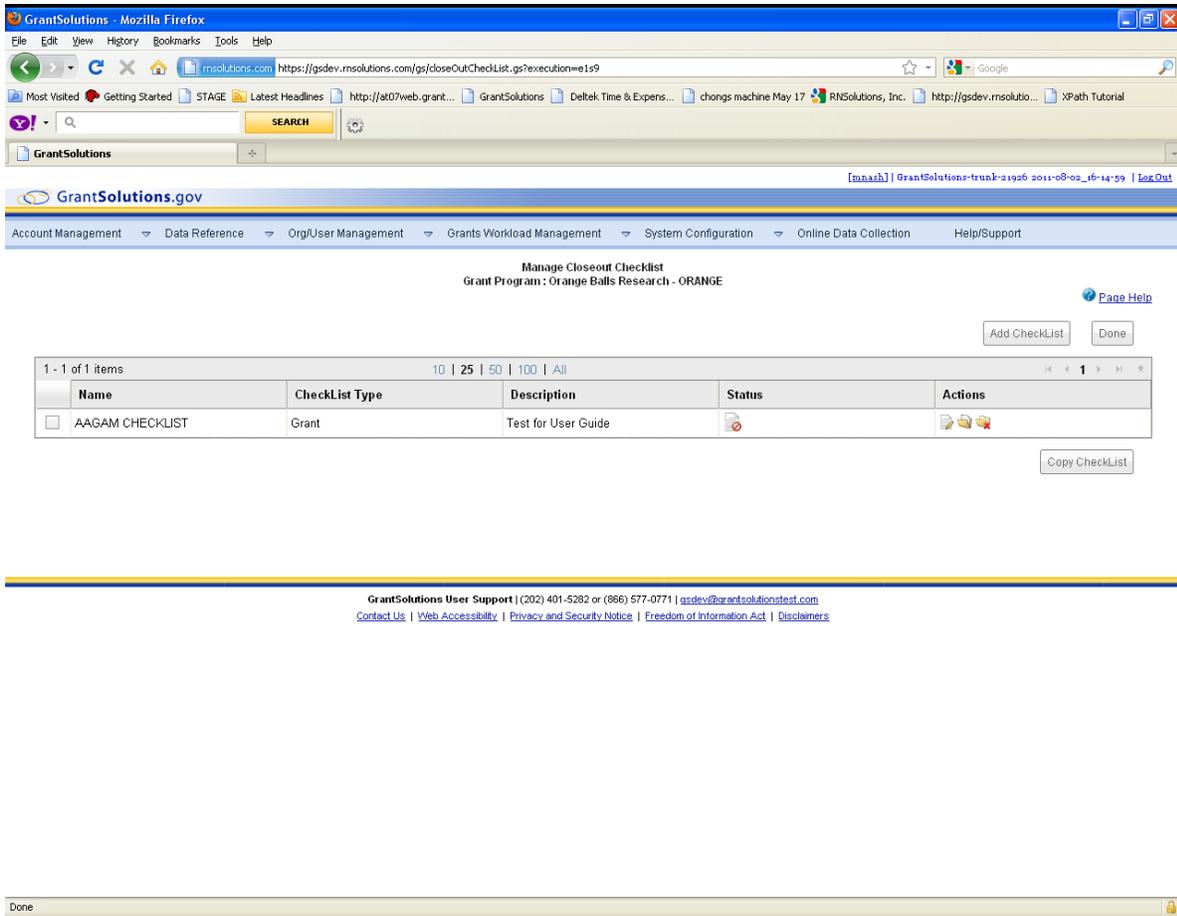


Required fields are:

- Name and
- Checklist Type.

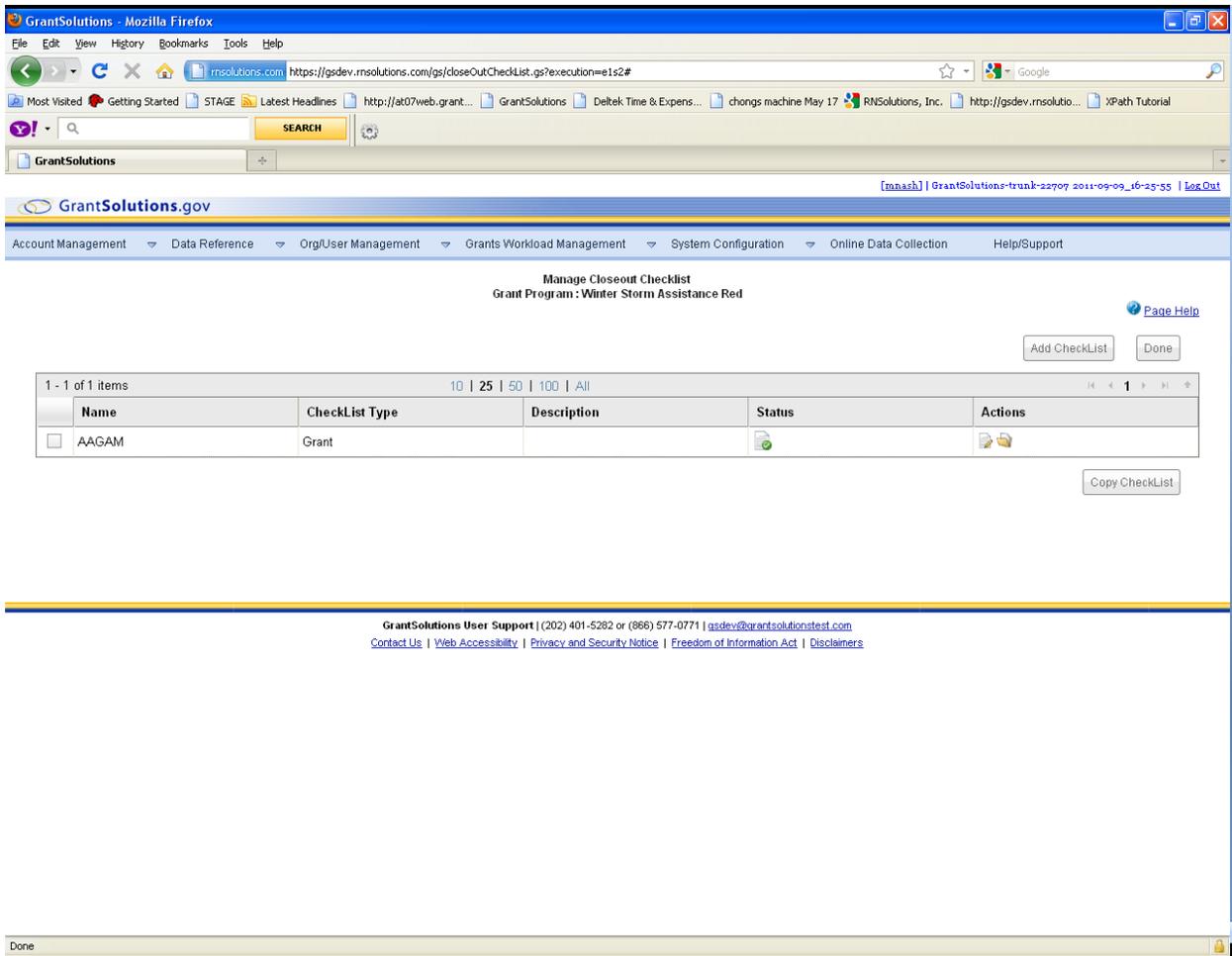
Enter the required information, add a description if desired and click the Save button.

Displayed is the Manage Closeout Checklist screen, which displays the Checklist, established in the previous step.



The status of the Checklist is displayed under the Status column.

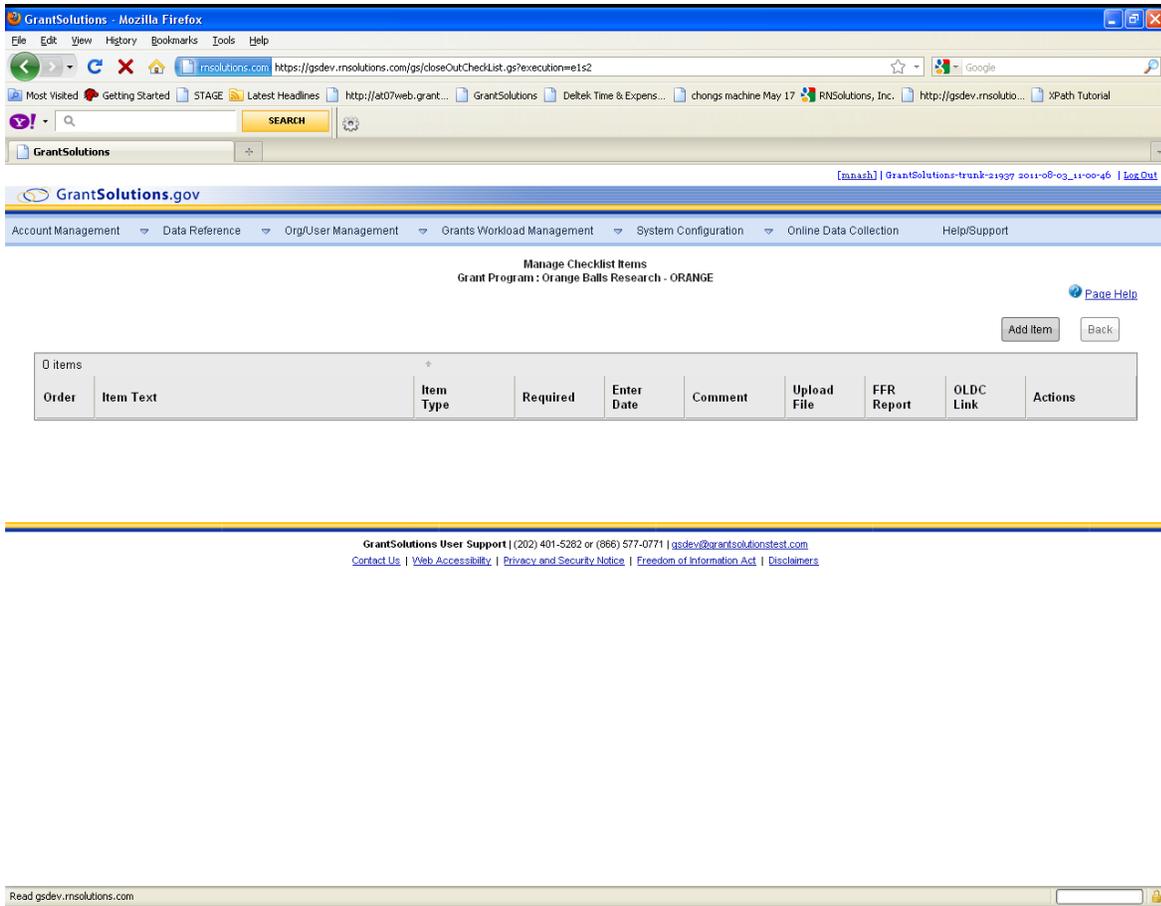
To activate a checklist, click the icon under the Status column. Note that the icon is displayed with the green check for active.



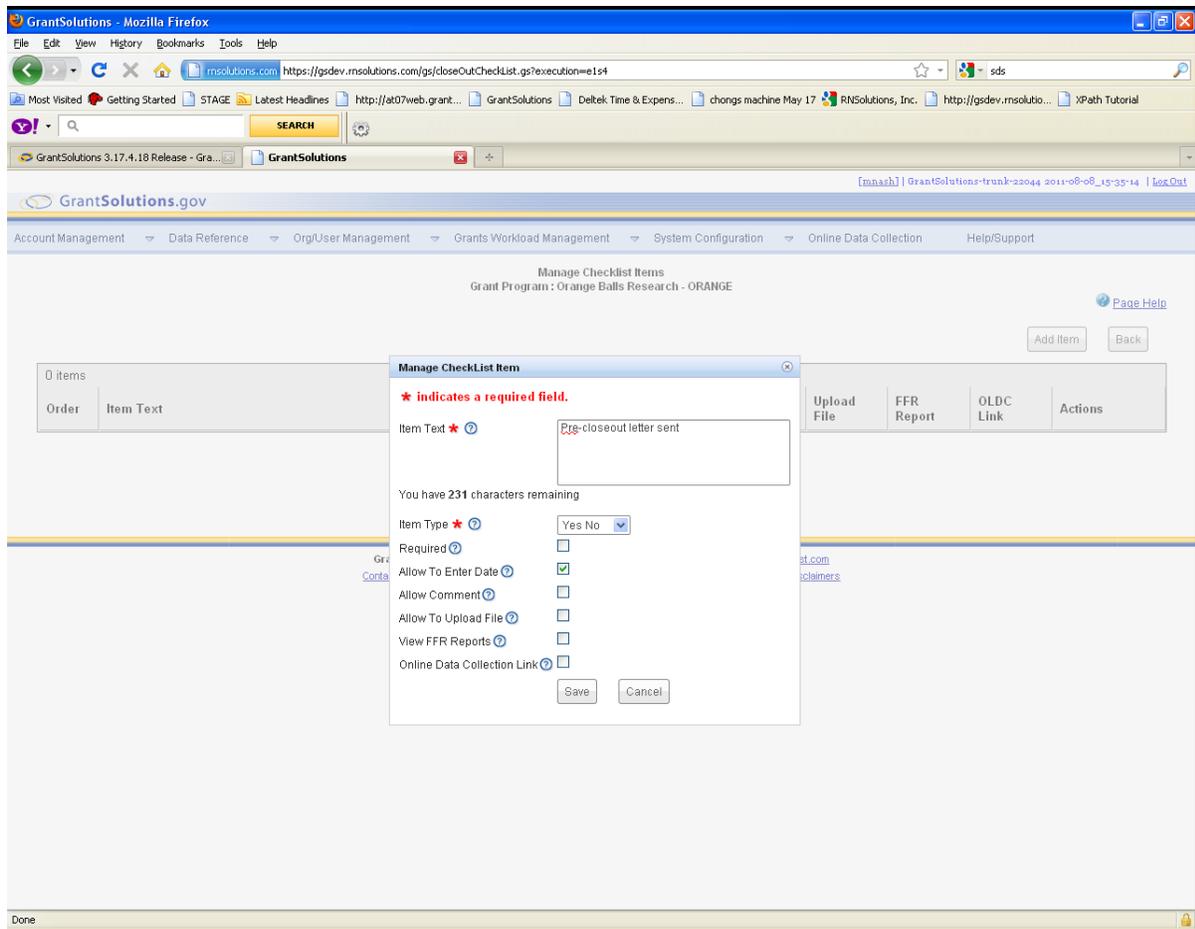
To add Checklist items: Select the Checklist, by clicking on the checkbox to the left of the checklist name.

Under the action column, select the folder icon (Open Checklist).

Displayed is the Manage Checklist Items screen.



Click on the Add Item button and the Manage Checklist Items pop-up is displayed.



Required fields are

- Item text and
- Item Type (the response is yes/no or free text).

NOTE: After the Item type has been saved, the type cannot be edited. For example to change the item from Free Test to a Yes/No, the user will be required to deleted the item and begin a new Item.

Options for items:

- Required: Item requires response prior to designating grant project as “Ready to Close”
- Allow the insertion of a date
- Allow the entry of a comment
- Allow the upload of a file
- Add a link to FFR reports
- Add a link to Online Data Collection

After entering the text of the item and selecting the option(s) for the item’s response, click the SAVE button. That item is now displayed on the Manage Checklist Items screen. Options selected for each item’s responses have a green checkmark under the option column.

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https://gsdev.rnsolutions.com/gscloseOutCheckList.gs?execution=e1s5

GrantSolutions.gov

Account Management Data Reference Org/User Management Grants Workload Management System Configuration Online Data Collection Help/Support

Manage Checklist Items
Grant Program : Orange Balls Research - ORANGE

Page Help

Add Item Back

1 - 1 of 1 items 10 | 25 | 50 | 100 | All

Order	Item Text	Item Type	Required	Enter Date	Comment	Upload File	FFR Report	OLDC Link	Actions
1	Pre-closeout letter sent.	Yes/No		✓					 

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Done

Continue to add items by clicking the Add Item button, until satisfied with the Checklist.

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https://gsdev.rnsolutions.com/gi/closeOutCheckList.gs?execution=e1s17

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Manage Checklist Items
Grant Program : Orange Balls Research - ORANGE

Page Help

Add Item Back

1 - 7 of 7 items 10 | 25 | 50 | 100 | All

Order	Item Text	Item Type	Required	Enter Date	Comment	Upload File	FFR Report	OLDC Link	Actions
1	Pre-closeout letter sent.	Yes/No		✓					
2	Final Financial Staus Report Received	Yes/No							
3	Final Financial Status Report Reviewed.	Yes/No		✓					
4	Final Program Progress Report received.	Yes/No							
5	Property Inventory and Disposition Statement received.	Yes/No		✓	✓				
6	Project Officer's Certification of completion of program requirements received.	Yes/No				✓			
7	Action on indirect costs, if applicable.	Free Text			✓				

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Done

To edit an item, click the Edit Item icon under the Actions column. This will reopen the Manage Checklist Item pop-up where edits are entered.

The Item Type cannot be edited and is locked. If it is required that the Item Type be revised, delete the Item and enter a new one.

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File Edit View History Bookmarks Tools Help

msolutions.com https://gsdev.msolutions.com/gscloseOutCheckList.gs?execution=e1s18

SEARCH

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Account Management Data Reference Org/User Management Grants Workload Management System Configuration Online Data Collection Help/Support

Manage Checklist Items
Grant Program : Orange Balls Research - ORANGE

Page Help

Add Item Back

Order	Item Text	Upload File	FFR Report	OLDC Link	Actions
1	Pre-closeout letter sent.				
2	Final Financial Status Report Received				
3	Final Financial Status Report Reviewed.				
4	Final Program Progress Report received.				
5	Property Inventory and Disposition Statement received				
6	Project Officer's Certification of completion of program requirements received.	✓			
7	Action on indirect costs, if applicable.				

Manage CheckList Item

*** indicates a required field.**

Item Text *
You have 255 characters remaining

Item Type *

Required

Allow To Enter Date

Allow Comment

Allow To Upload File

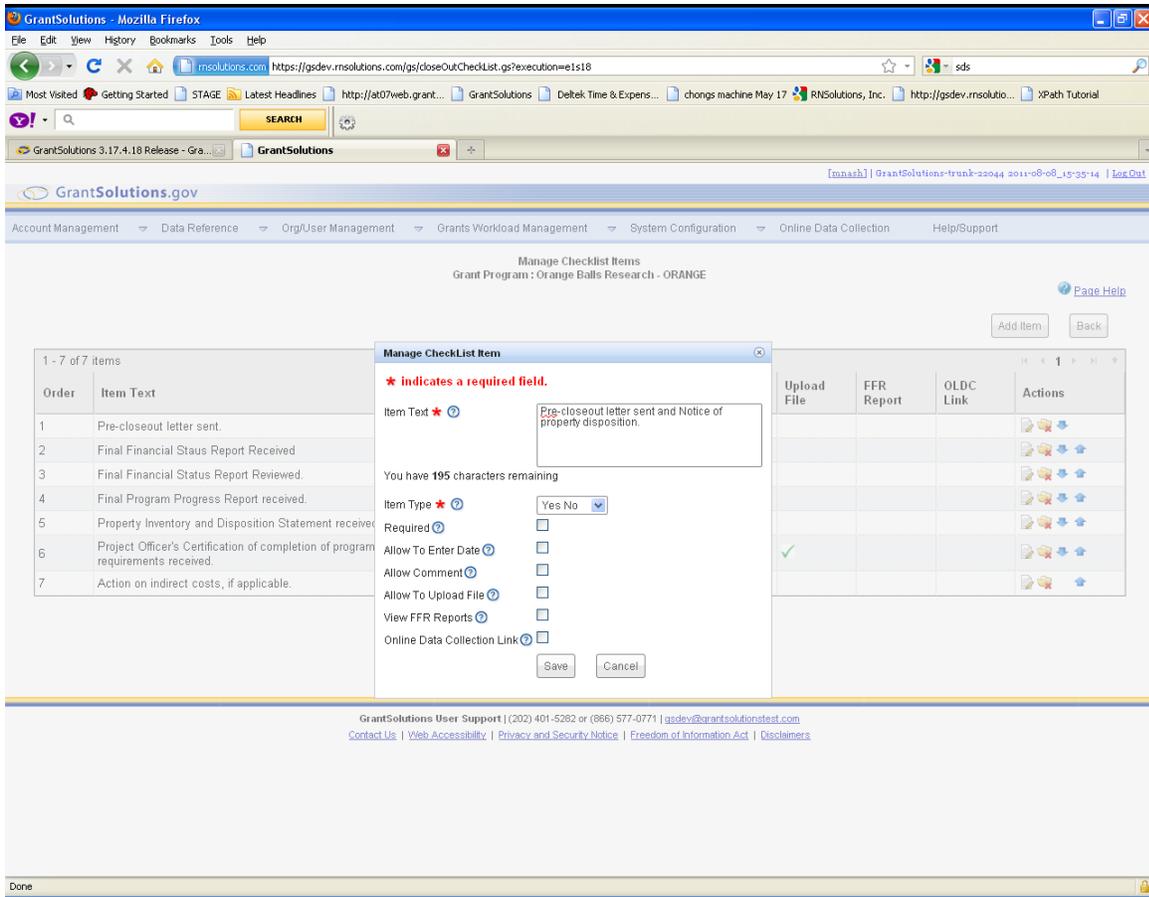
View FFR Reports

Online Data Collection Link

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Done

Make the appropriate edits and SAVE.



From the ACTIONS column, the order of the items may be moved up or down by clicking on the blue arrow icons.

To delete an item completely, click on the "Delete Item" icon under the Actions column.

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Account Management | Data Reference | Org/User Management | Grants Workload Management | System Configuration | Online Data Collection | Help/Support

Manage Checklist Items
Grant Program : Orange Balls Research - ORANGE

Page Help

Add Item Back

1 - 7 of 7 items 10 | 25 | 50 | 100 | All

Order	Item Text	Item Type	Required	Enter Date	Comment	Upload File	FFR Report	OLDC Link	Actions
1	Pre-closeout letter sent and Notice of property disposition.	Yes/No							
2	Final Financial Status Report Received	Yes/No							
3	Final Financial Status Report Reviewed.	Yes/No		✓					
4	Final Program Progress Report received.	Yes/No							
5	Property Inventory and Disposition Statement received.	Yes/No		✓	✓				
6	Project Officer's Certification of completion of program requirements received.	Yes/No				✓			
7	Action on indirect costs, if applicable.	Free Text			✓				

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Done

To return to the Manage Closeout Checklist, Click the Back button.

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Account Management | Data Reference | Org/User Management | Grants Workload Management | System Configuration | Online Data Collection | Help/Support

Manage Closeout Checklist
Grant Program : Orange Balls Research - ORANGE

Page Help

Add Checklist Done

1 - 1 of 1 items 10 | 25 | 50 | 100 | All

Name	CheckList Type	Description	Status	Actions
<input type="checkbox"/> AAGAM Grants Checklist	Grant			

Copy Checklist

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Done

To activate the Checklist, under the Status column click the icon. Active status will be an icon paper with a green check.

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File Edit View History Bookmarks Tools Help

msolutions.com https://gsdev.msolutions.com/gscloseOutCheckList.gs?execution=e1s3#

SEARCH

GrantSolutions

[mash] | GrantSolutions-trunk-22044 2011-08-08 15:35:14 | Log Out

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Account Management Data Reference Org/User Management Grants Workload Management System Configuration Online Data Collection Help/Support

Manage Closeout Checklist
Grant Program : Orange Balls Research - ORANGE

Page Help

Add CheckList Done

1 - 1 of 1 items 10 | 25 | 50 | 100 | All

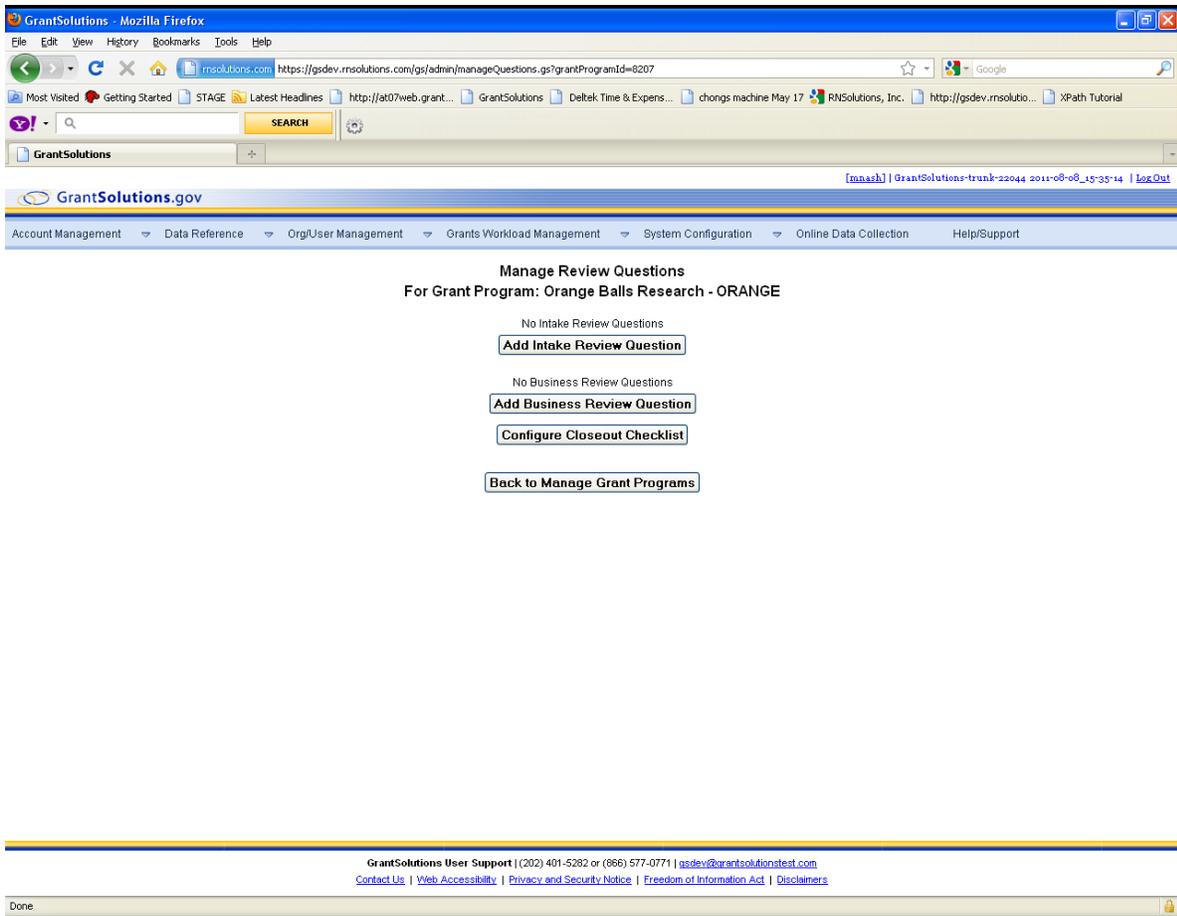
Name	CheckList Type	Description	Status	Actions
<input type="checkbox"/> AAGAM Grants Checklist	Grant			

Copy CheckList

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Done

When completed, click the “Done” button and return to the Manage Review Questions screen.



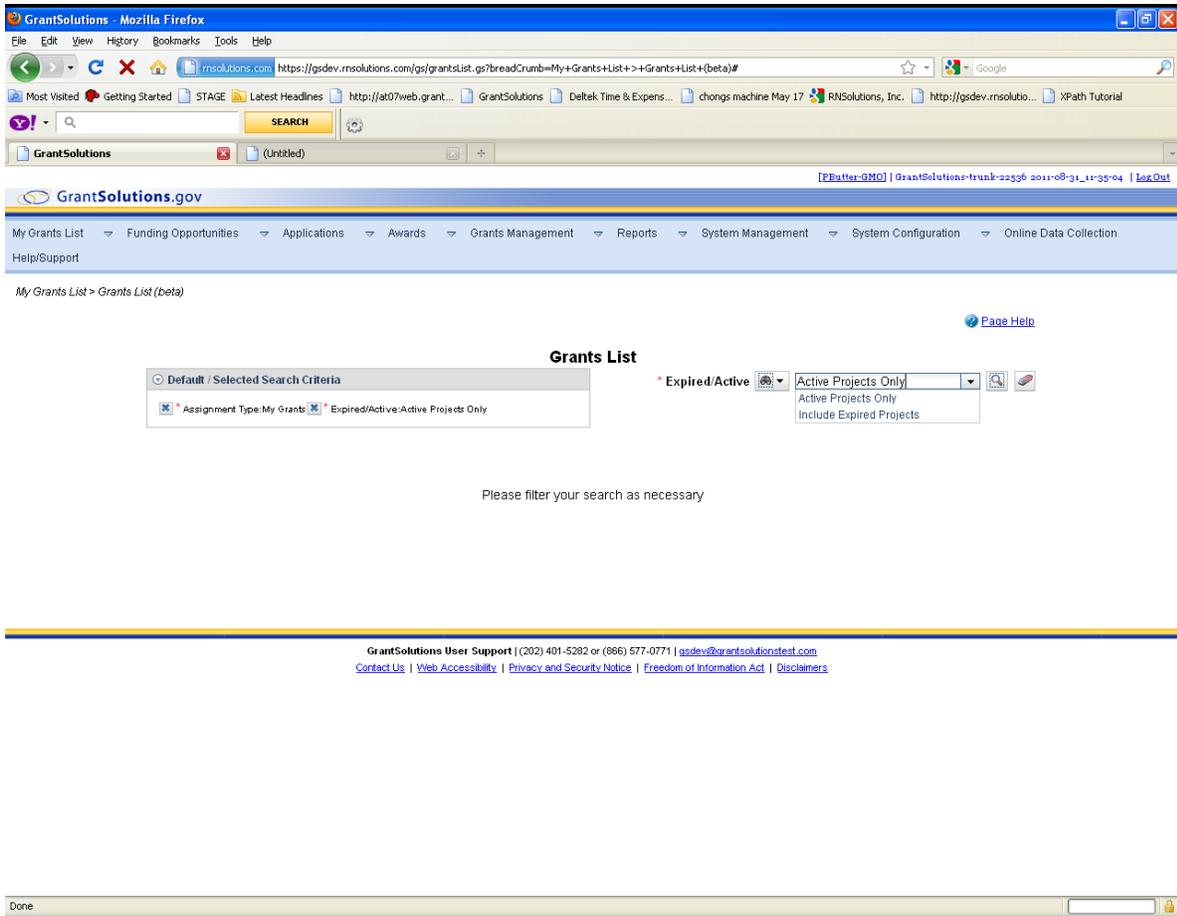
V. Process Closeout Checklists

For Grant Office staff and Program Office staff.

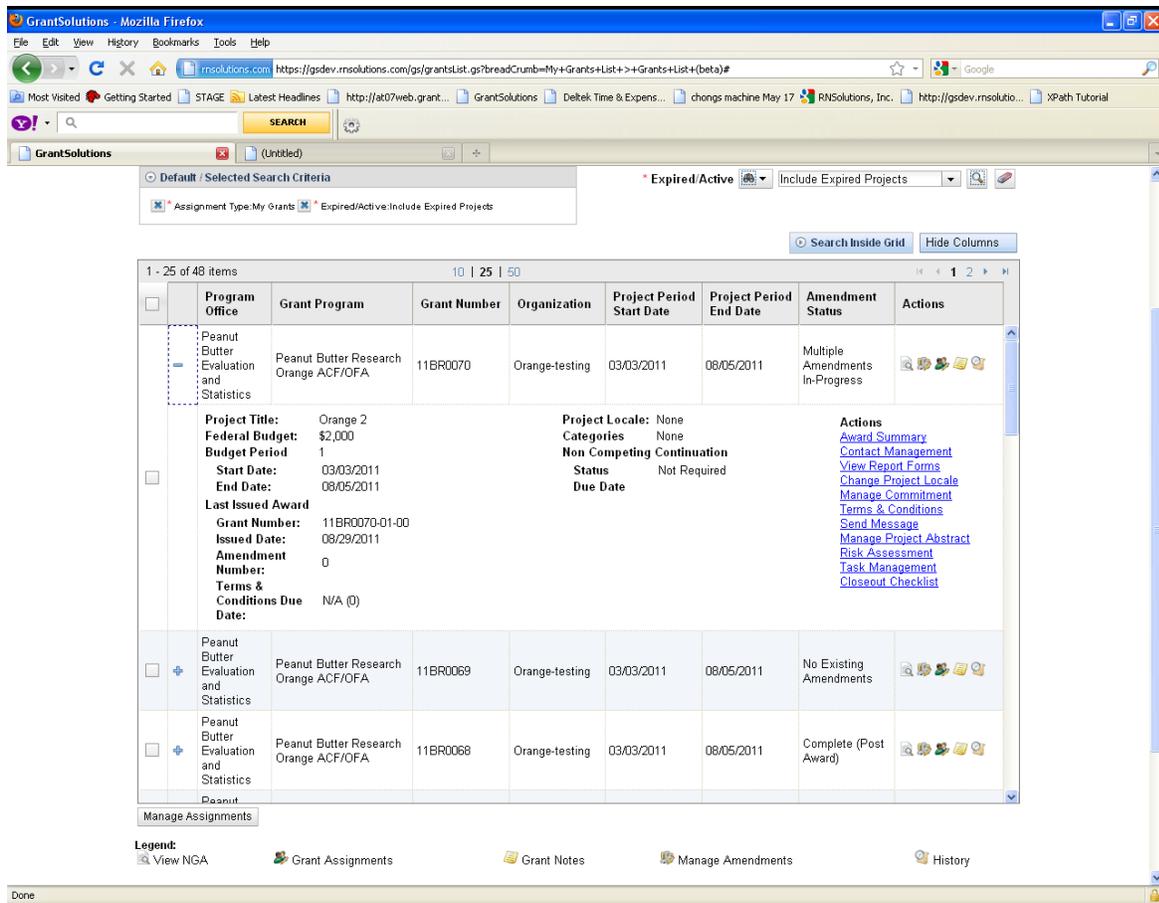
The Grant Checklist may be viewed by Program staff, but only completed by Grant staff.

The Program checklist may be viewed by Grant staff, but only completed by Program staff.

From the Grants List, search for "Include Expired Projects."



Open the details of the grant project by clicking on the plus sign. Displayed will be the Closeout Checklist link. Click on the Closeout Checklist Link.

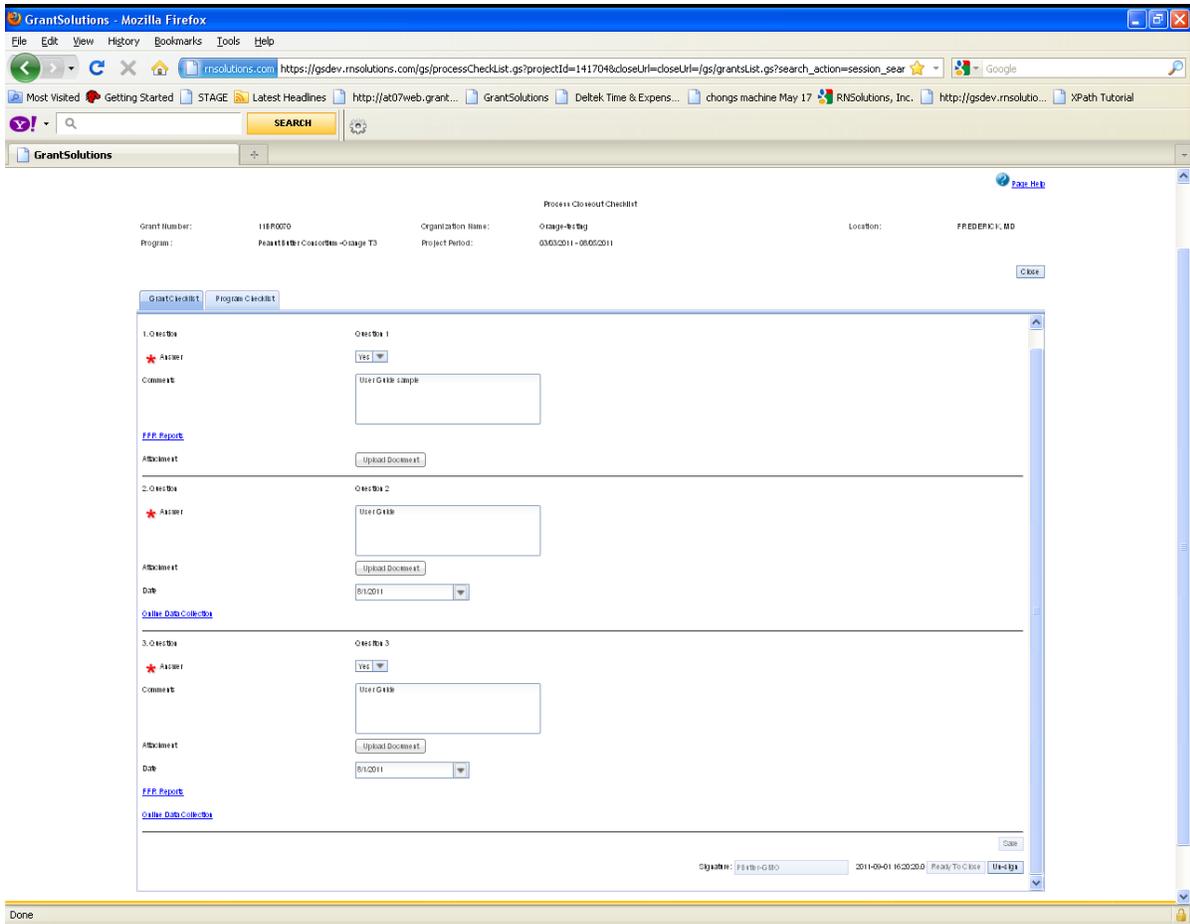


The checklist screen is displayed. Note a tab for the Grant Checklist and a tab for Program Checklist.

The Grant Checklist may be viewed by Program staff, but only completed by Grant staff.

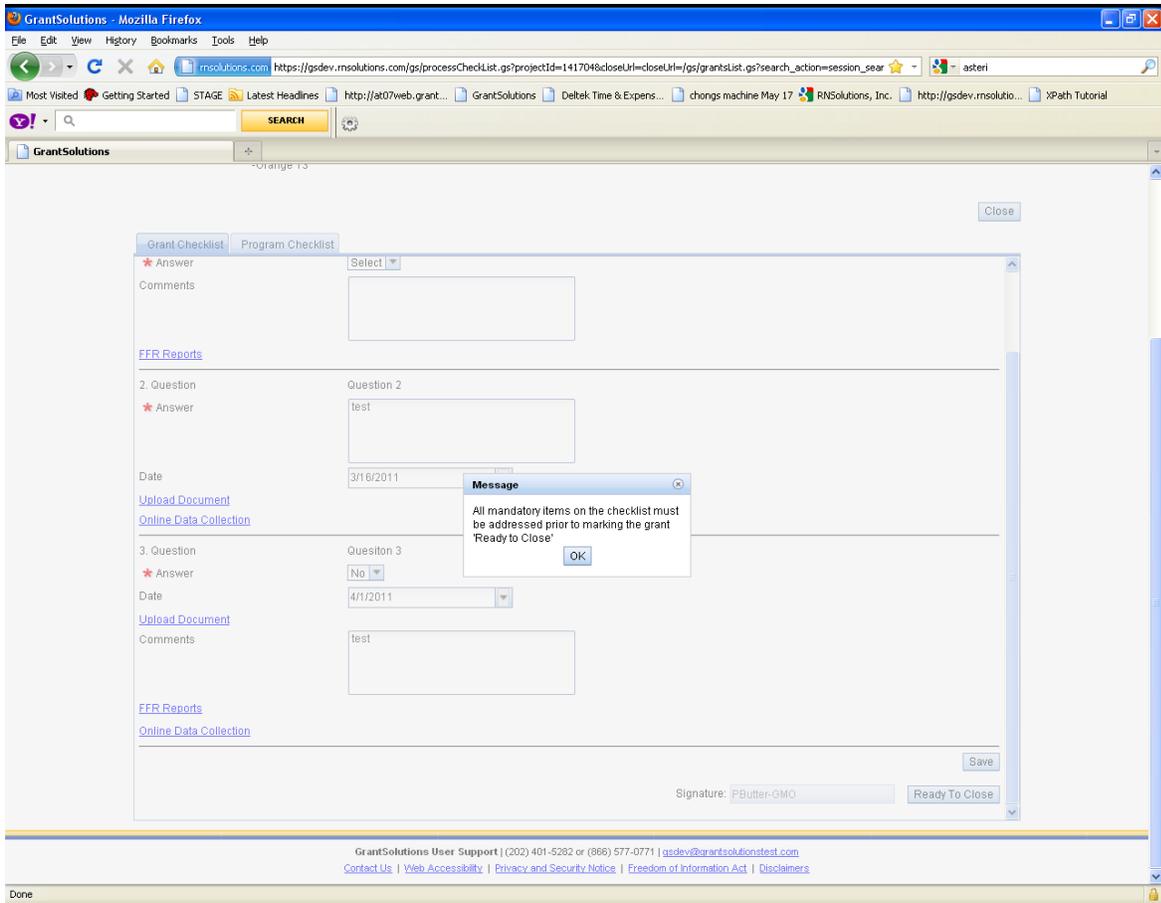
The Program checklist may be viewed by Grant staff, but only completed by Program staff.

Click the appropriate tab to complete a Checklist.



The user clicks the “Save” button to save responses and partial completion of Checklists prior to clicking the Ready to Close button.

Items with asterisks require a response before the system will allow the user to click the link to “Ready to Close.” A message will be displayed if all required Checklist items have not been address.



Confirmation of indicating a grant is “Ready to Close” is provided, as well as displaying the signature and date that the checklist was marked “Ready to Close.”

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msolutions.com https://gsdev.msolutions.com/grantsList.gs?breadCrumb=My+Grants+List+>+Grants+List+(beta)

Most Visited Getting Started STAGE Latest Headlines http://at07web.grant... GrantSolutions Deltek Time & Expens... chongs machine May 17 RNSolutions, Inc. http://gsdev.msolutio... XPath Tutorial

SEARCH

GrantSolutions

[Button:GMO] | GrantSolutions-trunk-2266g 2011-09-07_14:39:39 | Log Out

GrantSolutions.gov

My Grants List Funding Opportunities Applications Awards Grants Management Reports System Management System Configuration Online Data Collection

Help/Support

My Grants List > Grants List (beta)

Page Help

Grants List

Default / Selected Search Criteria

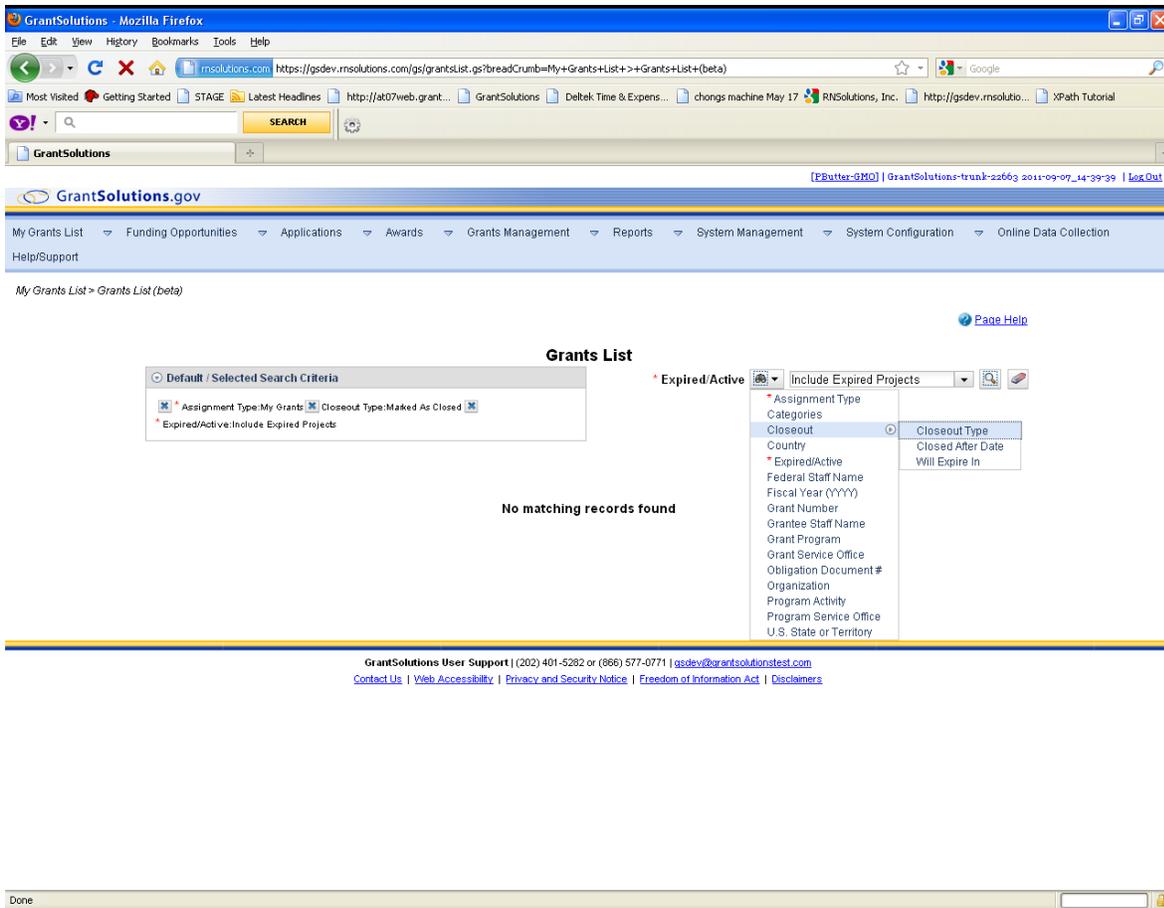
Assignment Type: My Grants Exired/Active: Active Projects Only Closeout
Type: Marked As Closed

Expired/Active Active Projects Only
Active Projects Only
Include Expired Projects

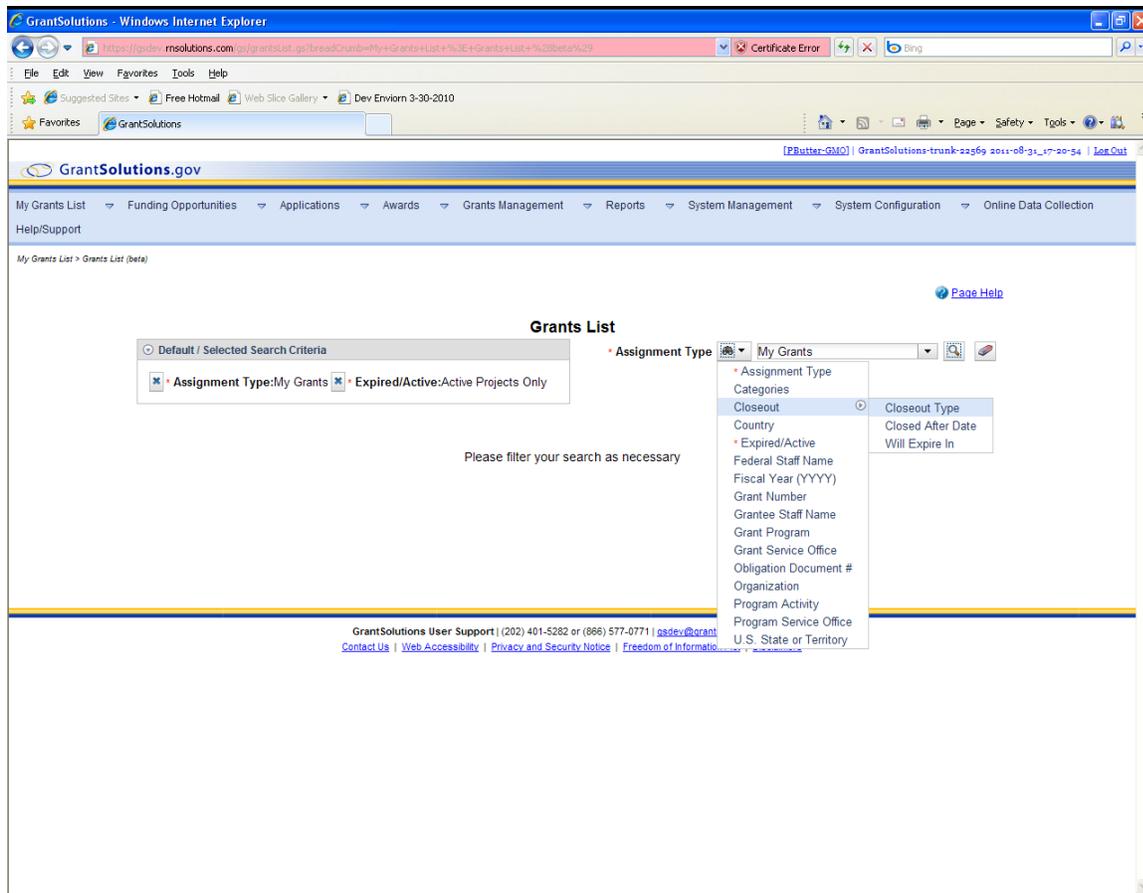
No matching records found

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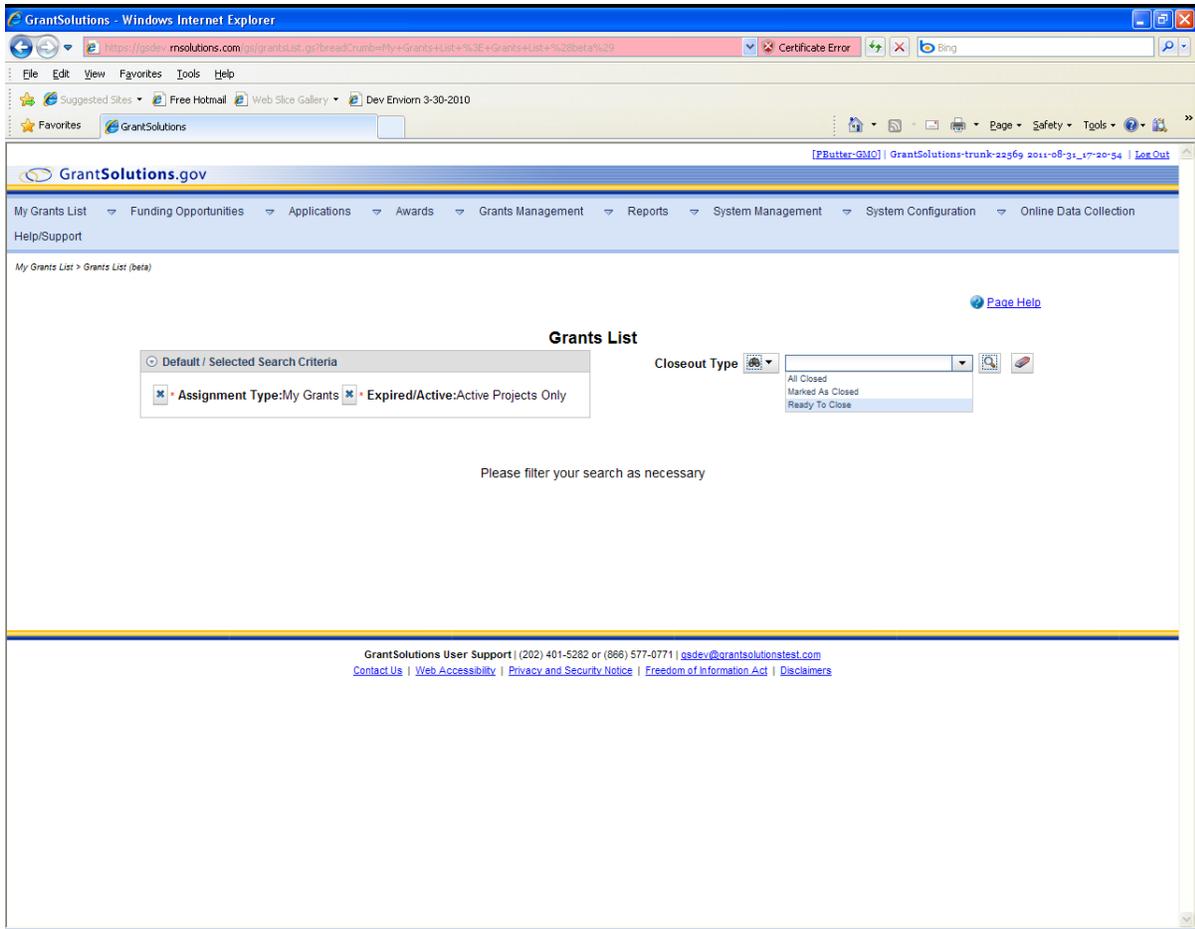
Done



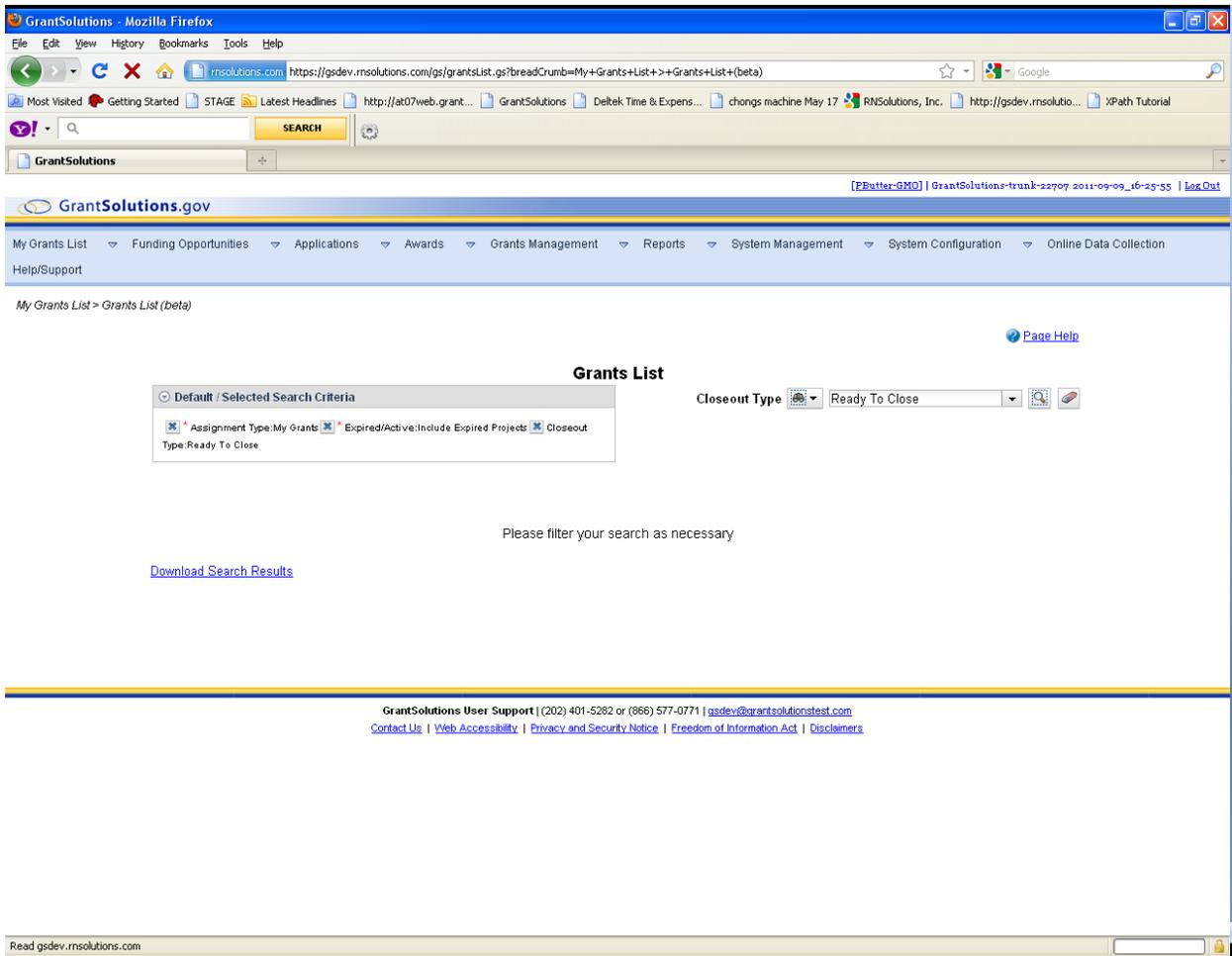
Next, add Closeout filter > Closeout Type.



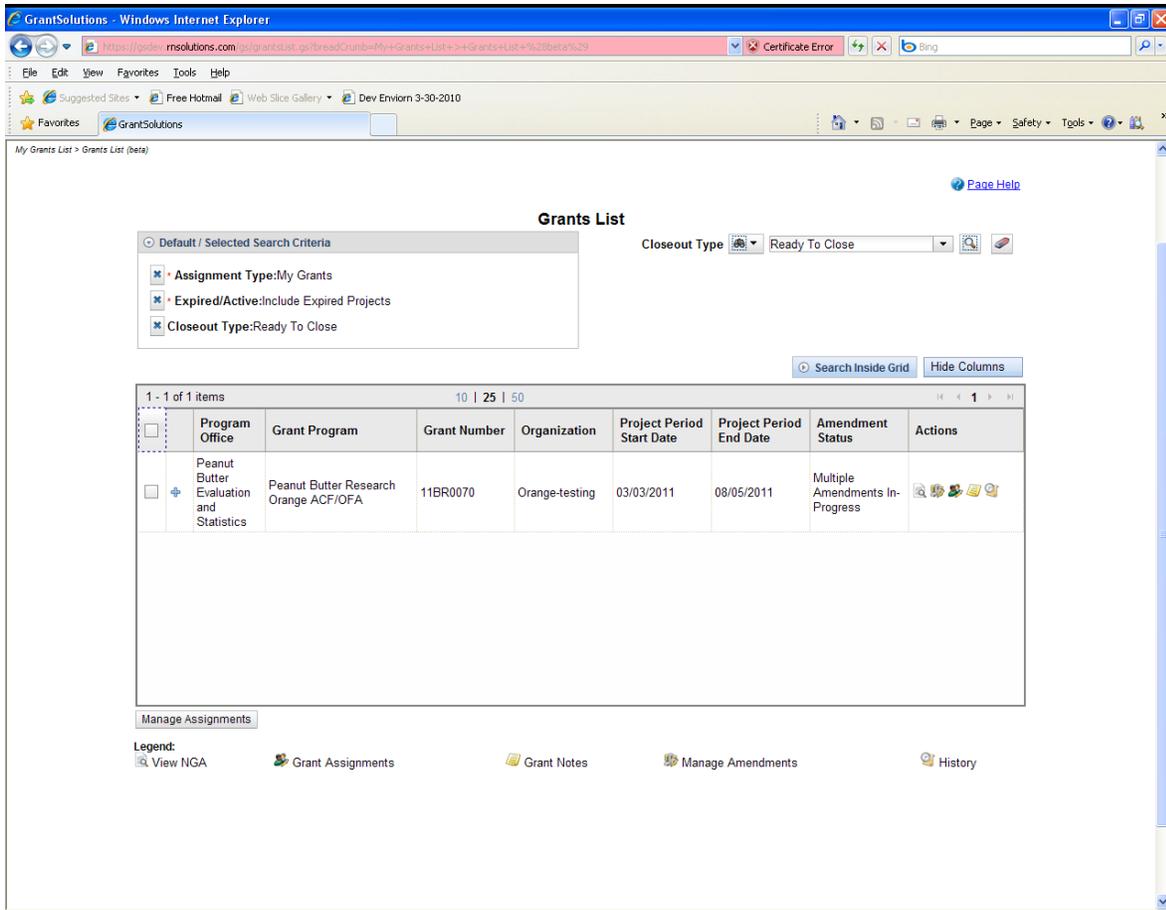
Then select filter “Ready to Close” from right side of menu box.



Then click the magnifying glass to the right of the menu box.



Search results are displayed:



VIII. Close Grants with the Ready to Close Indicator

Open the details of the grant project that is “Ready to Close” and displayed will be the “Closeout Grant” link.

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File Edit View History Bookmarks Tools Help

https://gsdev.rnsolutions.com/ga/grantsList.gs?breadCrumb=My+Grants+List+>+Grants+List+(beta)#

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My Grants List Funding Opportunities Applications Awards Grants Management Reports System Management System Configuration Online Data Collection Help/Support

My Grants List > Grants List (beta)

Grants List

Closeout Type: Ready To Close

Default / Selected Search Criteria

Assignment Type: My Grants Expired/Active: Include Expired Projects Closeout Type: Ready To Close

Search Inside Grid Hide Columns

Program Office	Grant Program	Grant Number	Organization	Project Period Start Date	Project Period End Date	Amendment Status	Actions
	Project Title: Orange 2 Federal Budget: \$2,000 Budget Period: 1 Start Date: 03/03/2011 End Date: 08/05/2011 Last Issued Award Grant Number: 11BR0070-01-00 Issued Date: 08/29/2011 Amendment Number: 0 Terms & Conditions Due Date: N/A (0) CCR Information				Project Locale: None Categories: None Non Competing Continuation Status: Not Required Due Date		Actions Award Summary Contact Management View Report Forms Change Project Locale Manage Commitment Terms & Conditions Send Message Manage Project Abstract Risk Assessment Task Management Closeout Checklist Closeout Grant Mark Grant Closed

Manage Assignments

Legend: View NGA Grant Assignments Grant Notes Manage Amendments History

Done

Click the Closeout Grant link to navigate to the Manage Amendments screen.

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https://gsdev.rnsolutions.com/gervlet/grantlist.manageamendments.ManageAmendmentsListServlet?project_id=141704&close_url=/gs/

GrantSolutions

My Grants List Funding Opportunities Applications Awards Grants Management Reports System Management System Configuration Online Data Collection Help/Support

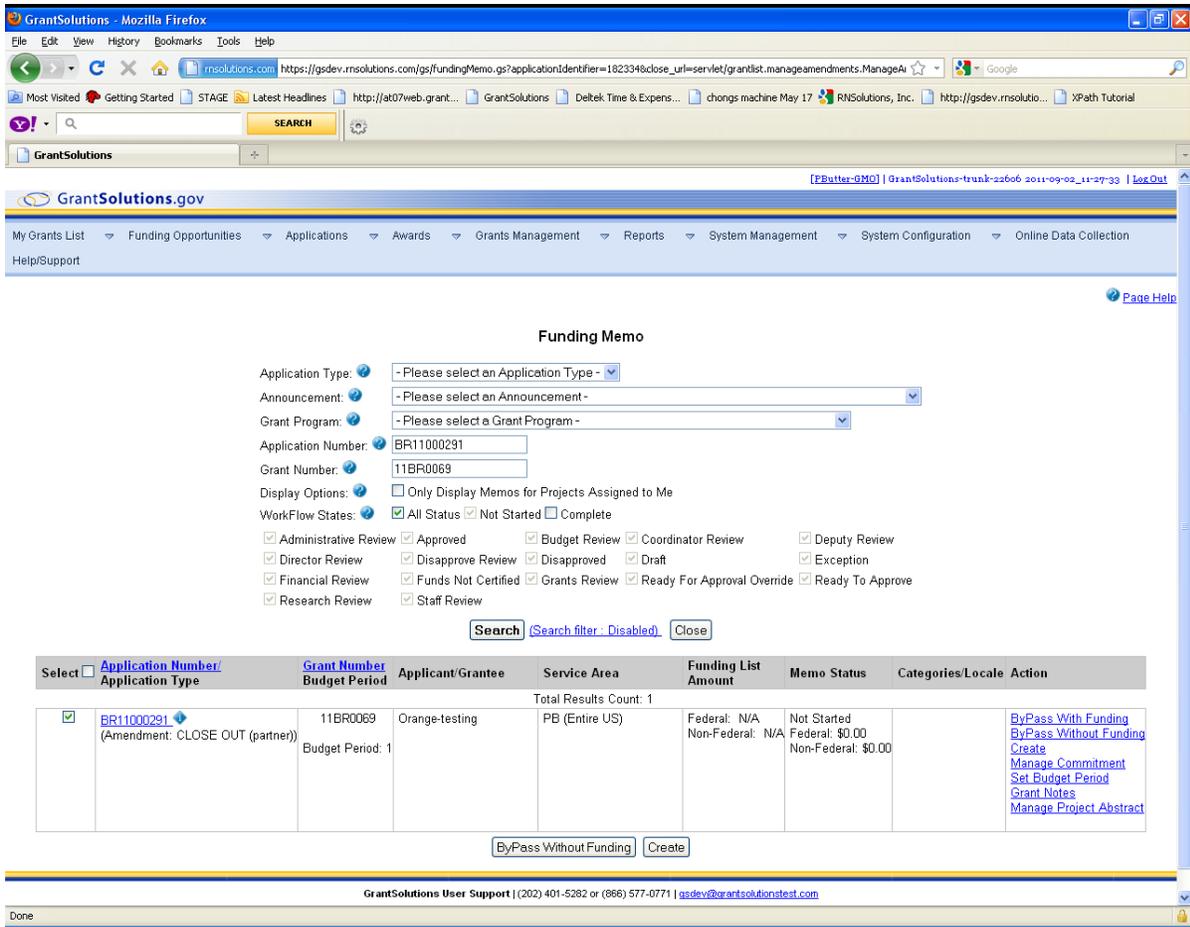
Manage Amendments

Grant Number: 11BR0070
 Grantee Name: Orange-testing
 Project Title: Orange 2
 Project Start Date: 03/03/2011
 Project End Date: 08/05/2011
 Last Issued NGA: 08/29/2011 [View NGA](#)

Amendment #	Status	Submitted Date	Type	Budget Period	Funds Requested	Funds Approved	Funding Memo Required	Action
							Funding Memo Status	
BR11000284	Review In Progress (Post Award)	08/29/2011 12:00:00 AM	changePI/PI/D	1 03/03/2011 - 08/05/2011	\$0	\$0	No Approved	View Amendment View Memo Process Memo Budget Worksheet Grant Notes History Send Message
BR11000307	Complete (Post Award)		CLOSE OUT (partner)	1 03/03/2011 - 08/05/2011	N/A	N/A	No N/A	View Amendment Disapproval Process Memo Set Budget Period Budget Worksheet Grant Notes History Send Message
BR11000286	Complete (Post Award)		CLOSE OUT (partner)	1 03/03/2011 - 08/05/2011	N/A	N/A	No N/A	View Amendment Disapproval Process Memo Set Budget Period Budget Worksheet Grant Notes History

Select the Post Award Amendment by completing the checkbox under the Select column if there is more than one amendment displayed on the screen.

To process the Funding Memo click on the "Process Memo" link. The user may ByPass Without Funding or create the Funding Memo. If the user creates the Funding Memo the standard review and approval process will presented to the user.



From the ByPass Without Funding link the user will see displayed the Funding Memo screen.

After completing the checkbox under the Select column, click on the Generate button or Generate link under the Action column.

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My Grants List | Funding Opportunities | Applications | Awards | Grants Management | Reports | System Management | System Configuration | Online Data Collection | Help/Support

Page Help

Funding Memo

Application Type:

Announcement:

Grant Program:

Application Number:

Grant Number:

Display Options: Only Display Memos for Projects Assigned to Me

WorkFlow States: All Status Not Started Complete

Administrative Review Approved Budget Review Coordinator Review Deputy Review
 Director Review Disapprove Review Disapproved Draft Exception
 Financial Review Funds Not Certified Grants Review Ready For Approval Override Ready To Approve
 Research Review Staff Review

Select	Application Number/ Application Type	Grant Number Budget Period	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	NGA Status	Categories/Locale	Action
Total Results Count: 1									
<input type="checkbox"/>	BR11000303 (Amendment: CLOSE OUT (partner))	11BR0067 Budget Period: 1	Orange-testing	PB (Entire US)	Federal: N/A Non-Federal: N/A	Approved Federal: \$0.00 Non-Federal: \$0.00	Ready to Generate		History Manage Commitment Set Budget Period View Grant Notes Manage Project Abstract Disapprove Generate

Done

The confirmation screen that a draft Notice of Grant Award was generated will be displayed. Click the Close button.

GrantSolutions - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://gsdev.rnsolutions.com/ga/servlet/postaward.nga.GenerateDraftNgaServlet?generateSingle=Y&close_url=/gs/fundingMemo.gs&Appl

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[EButter:GMD] | GrantSolutions-trunk-22606 2011-09-02_11-27-33 | [Log Out](#)

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Generated Draft NGA(s)

GrantSolutions Generated Draft NGAs for the following application(s):

Grant Number	Grantee Name	Budget Start Date	Budget End Date	Application Number
11BR0069-01-01	Orange-testing	03/03/2011	08/05/2011	BR11000281

Please go to [NGA - In Process/Draft](#) to find grant and edit.

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Done

Go to the main menu. Awards > Award Processing.

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https://gsdev.msolutions.com/gstervlet/grantlist.FederalGrantListServlet

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My Grants List ▾ Funding Opportunities ▾ Applications ▾ Awards ▾ Grants Management ▾ Reports ▾ System Management ▾ System Configuration ▾ Online Data Collection

Help/Support

My Grants List

*** indicates a required field.**

Assignment Type ***** Award Processing
 Funding Memo
 Award Amount Determination
 Move Batch Items
 Grant Replacement
 Issue Not Funded Notice
 NGA Components

Program Activities

Grant Program

Grantee Name

Grant Number

Grant Document Number

Budget Period End Date
 (Format: mm/dd/yyyy)

Hide Expired

[\(Search filter - Disabled\)](#)

Please enter search criteria above.

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https://gsdev.msolutions.com/gstervlet/grantlist.gs?breadCrumb=Awards->+Award+Processing

Displayed will be the Award List. Perform Search by clicking the Search button.

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File Edit View History Bookmarks Tools Help

https://gsdev.rnsolutions.com/g5/ngawiplist.gs?breadCrumb=Awards+>+Award+Processing

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[Batter:9MD] | GrantSolutions-trunk-2268a 2011-09-08_12:42-03 | LogOut

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Help/Support

Awards > Award Processing

Page Help

Award List

Application Type: -Please Select an Application Type-

Announcement: -Please Select an Announcement-

Grant Program: -Please Select a Grant Program-

Processing Cycle: Batch

NGA Status: All Status

Application Number:

Grant Number:

Grantee Name:

Budget Cycle: Year: Qtr: 1 Dates > Begin: End:

Search

Please enter search criteria above.

No NGAs found for your search criteria.

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Done

Results will be displayed on the Award List.

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Awards > Award Processing

Page Help

Award List

Application Type: -Please Select an Application Type-
 Announcement: -Please Select an Announcement-
 Grant Program: -Please Select a Grant Program-
 Processing Cycle: Batch-
 NGA Status: All Status-
 Application Number:
 Grant Number:
 Grantee Name:
 Budget Cycle: Year: Qtr: 1 Dates: Begin: End:

Search

Please enter search criteria above.

Select	Grantee Name	Grant Number	Total Approved	Application # Application Type Funding Level Application Notes	Budget Start Date	Budget End Date	Last Updated By/Date	Workflow Status	Change Workflow Status	Action
	Orange-testing	11BR0061-01-01 Support Year: 1 Revision Num: 1	\$2,000	BR11000272 NGA revision \$2,000 View Print Approval Memo Application Notes	03/03/2011	08/05/2011	P Butler-GMO / 08/26/2011	Drafted History	Ready for Approval	Edit Delete View/Print View Last NGA Organization Select Org Address Grant Assignments Budget Worksheet Terms and Conditions View History Award Summary Manage Project Abstract Manage Commitment
	UDOC -ORANGE	10BR0022-01-02 Support Year: 1 Revision Num: 2	\$0	BR11000230 NGA revision \$0 View Print Approval Memo Application Notes	10/01/2010	05/31/2013	Aqua type3-gmo / 08/12/2011	Drafted History	Ready for Approval	Edit Delete View/Print View Last NGA Organization Select Org Address Grant Assignments Budget Worksheet Terms and Conditions View History Award Summary Manage Project Abstract Manage Commitment
Done										Edit Delete

Locate the grant. From the Award List, under the Action column click on the link to Budget Worksheet.

Displayed will be the Budget Worksheet screen.

Budget Worksheet - Mozilla Firefox

File Edit View History Bookmarks Tools Help

msolutions.com https://gsdev.msolutions.com/gsf/forms/budgetWorksheet.gs?mgald=294633&applicationId=182163&closeURL=/gs/ngawiplst.gs?search_

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Budget Worksheet

[FButter:GMO] | GrantSolutions-trunk-22682 2011-09-08_12-42-03 | Log Out

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Help/Support

Please send comments, suggestions, and issues to the following email link
GS-BudgetWorksheet@msolutions.com

Budget Worksheet

[Page Help](#) [Print](#)

Applicant: Orange-testing	Project Period: 03/03/2011 - 08/05/2011	Current Funding Amount: \$2,000.00
EIN: 1123456789A2	Budget Period: 03/03/2011 - 08/05/2011	Prior Funding Amount: \$1,500.00
Grant Number: 11BR0061-01-01	Budget Year: 1	Total Approved Fed Amount: \$3,500.00
Application #: BR11000272	Amendment #: 01	

Calculate Budget as:

Total Cost (Total Budget - Non-Federal - In Kind Contributions - Unobligated Reprogram - Unobligated Offset)

Federal Only (Total Budget - Unobligated Reprogram - Unobligated Offset)

Current Scenario: Initial (This is the Active Scenario)

Add Activity	<input type="text"/>	Create New Scenario
Delete Activity	Select an Activity	Delete Current Scenario
Rename Activity	Select an Activity	Load Scenario Select Scenario

Scroll down to the Direct Cost grid. Enter any deobligation amount under the Recommended column. It is suggested that any deobligation amount be entered in the OTHER line item.

Budget Worksheet - Mozilla Firefox

File Edit View History Bookmarks Tools Help

msolutions.com https://gsdev.msolutions.com/gx/forms/BudgetWorksheet.gs?ngaid=294753&applicationId=182334&closeURL=/gs/ngawiplist.gs?search_

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Budget Worksheet

Panel: Buler Research Overage ACFOFA

Direct Cost (Panel: Buler Research Overage ACFOFA)

Category	Final Budget	Requested	Agency Adjusted Requested	Adjustment	Recommended	Total	Non-Federal	Federal	Unallocated Balance
Personnel	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fringe Benefits	1,700.00	-1,700.00	0.00	1700.00	0.00	1,700.00	0.00	1,700.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contractual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Construction	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other	0.00	0.00	0.00	-500.00	-500.00	-500.00	0.00	-500.00	0.00
Total Direct	1,700.00	-1,700.00	0.00	1,200.00	-500.00	1,200.00	0.00	1,200.00	0.00
Indirect	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Grand Total:	1,700.00	-1,700.00	0.00	1,200.00	-500.00	1,200.00	0.00	1,200.00	0.00

Indirect Cost (Panel: Buler Research Overage ACFOFA)

Description	Method	Base	Rate %	Month	Recommended	Total	Non-Federal	Federal	Total Project Amount	% Total Project Amount
1 - Indirect	Hourly	0.00		12	0.00	0.00	0.00	0.00	1,200.00	0.0
Total:					0.00	0.00	0.00	0.00	1,200.00	0.0

Done

Category	Previous Budget	Requested		Adjustment	Recommended	Total	Non-Federal	Federal	Unobligated Balance
		Agency Adjusted Requested							
Personnel	100.00	0.00	0.00	0.00	0.00	100.00	0.00	100.00	0.00
Fringe Benefits	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contractual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Construction	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other	0.00	0.00	0.00	-33.00	-33.00	-33.00	0.00	-33.00	0.00
Total Direct	100.00	0.00	0.00	-33.00	-33.00	67.00	0.00	67.00	0.00
Indirect	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Grand Totals	100.00	0.00	0.00	-33.00	-33.00	67.00	0.00	67.00	0.00

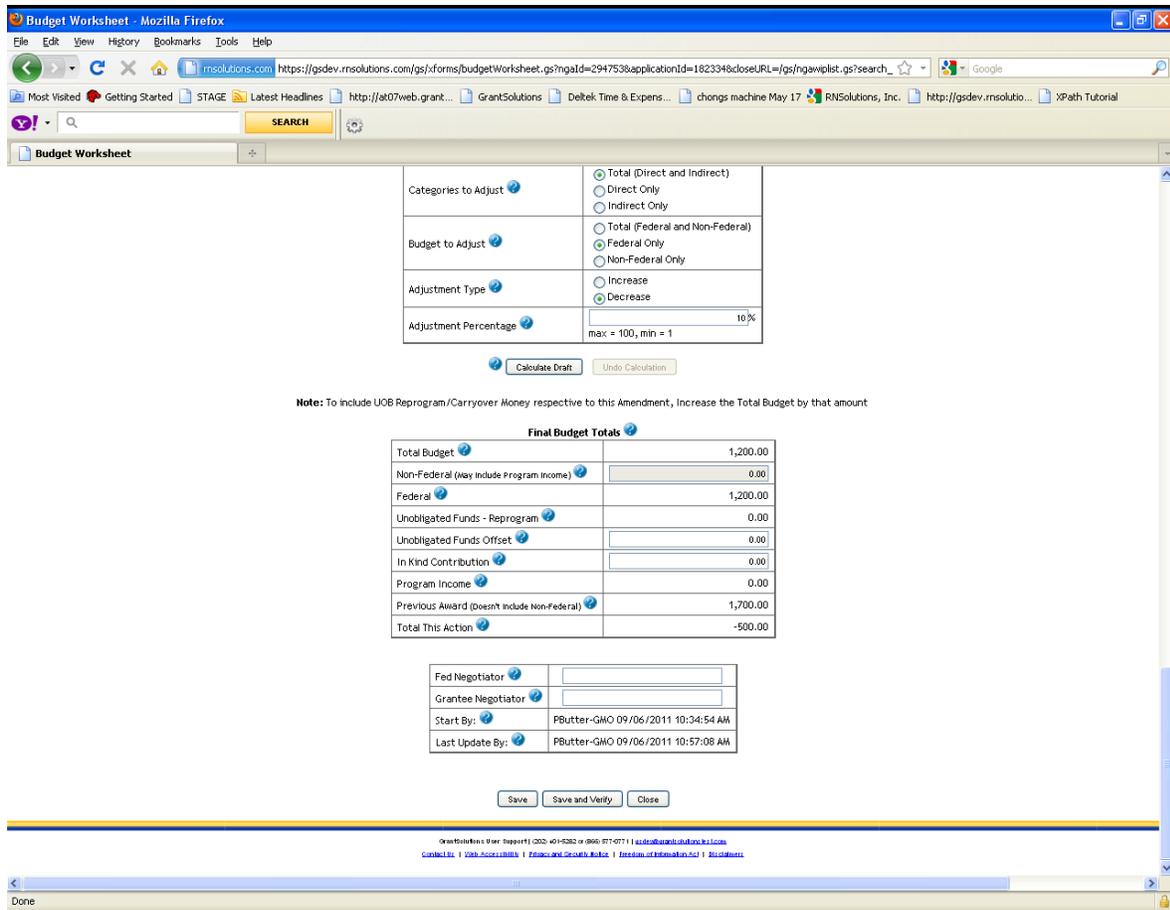
Scroll down the Budget Worksheet screen.

Displayed is the Full Budget Adjustment calculation and the Final Budget Totals.

The Final Budget Totals grid displays the Total of the current action. For a deobligation closeout, Total This Action must be a negative amount.

Scroll further down the screen and click the Save and Verify button. Any Warnings or Errors will be displayed.

Next click the Close button.



The system brings the user to the Award List.

Click the EDIT Action link to edit the Notice of Grant Award. Under the Financial Information section, enter any deobligation amount as a negative number into the New Amount column. If there is more than one award displayed, a zero must be entered if there is not s deobligation amount from that Financial Account.

21. APPLICANT EIN:
271944615

22. PAYEE EIN:
PMS EIN 1123456789A2 Vendor (code: 1123456789A2) has been verified.
 Please select this box if you wish to bypass EIN verification for this award. The selected Vendor's code is 1123456789A2

23. OBJECT CLASS:
40.45 - Orange T-3 ACF

24. FINANCIAL INFORMATION:
 Do not send transaction to accounting system.

ORGN	DOCUMENT NO.	APPROPRIATION	FINANCIAL ACCOUNT NO.	NEW AMT.	UNOBLIG	NONFED %	Treasury Account Symbol Account Code	Treasury Account Symbol Sub-Account Code
	11BR0068A1	1234	1-G999991	\$ -500.00	.00		0001	
	11BR0068A2	1234	1-G999991	\$ 0.00	.00		0001	
	11BR0068A3	1234	1-G999991	\$ 0.00	.00		0001	

25. REMARKS:
This is a Closeout action.

26. SIGNATURE - ACF GRANTS OFFICER:
Title:

27. SIGNATURE(S) CERTIFYING FUND AVAILABILITY

28. SIGNATURE AND TITLE - PROGRAM OFFICIAL(S):
DATE (MM/DD/YYYY):

ByPass Central Contractor Registration Validation
 Please select this box if you wish to bypass Central Contractor Registration Validation for this award.

Funding Transparency Act Award Recipient Information:

Funding Transparency Act Award Project & Award Information:

Funding Transparency Act Award Principal Place Of Performance Information:

Award Notification:

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PLEASE NOTE the following on the Notice of Grant Award:

Number 24.

Within Number 24, Financial Information section of the draft Notice of Grant Award, there is a checkbox labeled DO NOT SEND TRANSACTION TO ACCOUNTING SYSTEM. When checked, the system will NOT send a financial transaction to PMS, and will close the grant in GrantSolutions only.

If more than one financial account is displayed and funds are being deleted from one financial account, the other displayed account requires the entering of zero under the New Amount column.

Number 25.

Remarks section of the draft Notice of Grant Award will pre-populate with “This is a Closeout action.” when it is a closeout amendment.

Click on the Save and Verify button.

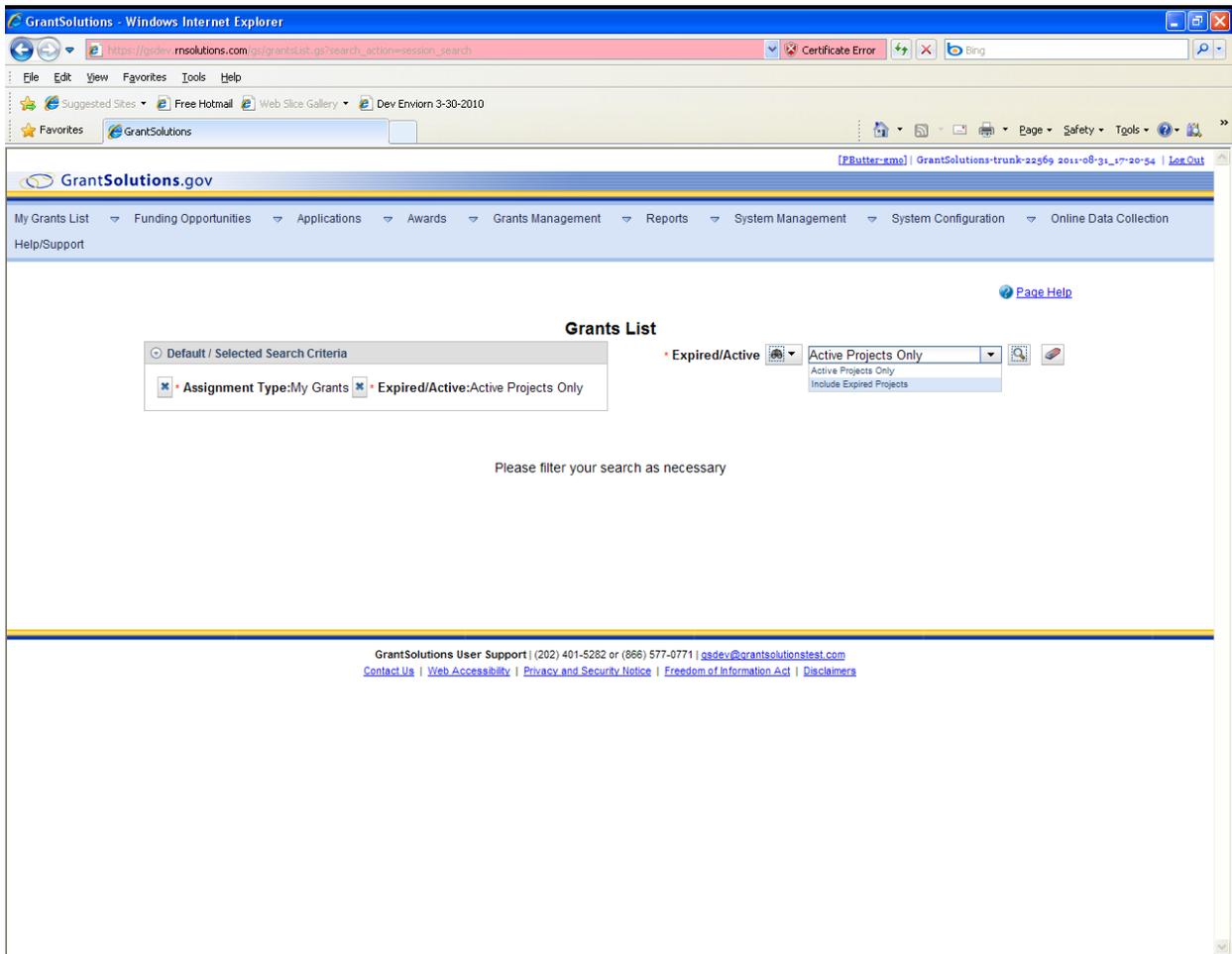
Ready for Approval link under the Change Workflow Status may be checked. Proceed with standard approval workflow.

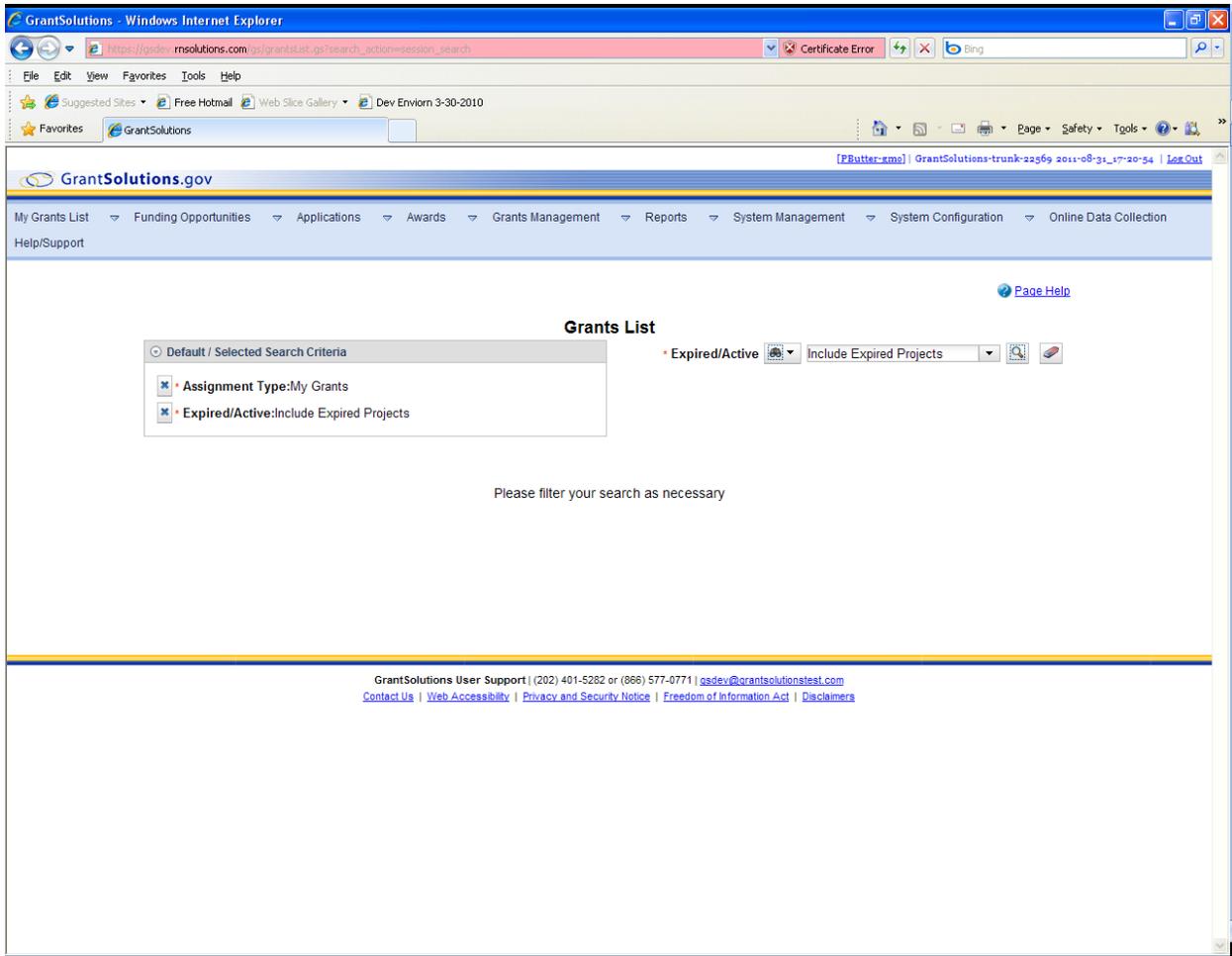
IX. Mark A Grant Closed

This function is used only when the intent is to close out the grant in GrantSolutions ONLY.

No financial transactions or Notice of Grant Awards result from this action. This action will probably only be taken when PMS has previously closed the grant in PMS (FOR ACF).

Search for grants and Include Expired Projects from the Grants List.





Open the details of the desired grant project and the Mark Grant Closed link is displayed.

Program Office	Grant Program	Grant Number	Organization	Project Period Start Date	Project Period End Date	Amendment Status	Actions
Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0070	Orange-testing	03/03/2011	08/05/2011	Multiple Amendments In-Progress	[Icons]
Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0069	Orange-testing	03/03/2011	08/05/2011	No Existing Amendments	[Icons]
Project Title: Orange 2 Federal Budget: \$1,700 Budget Period: 1 Start Date: 03/03/2011 End Date: 08/05/2011 Last Issued Award Grant Number: 11BR0069-01-00 Issued Date: 08/29/2011 Amendment Number: 0 Terms & Conditions Due Date: N/A (0)		Project Locale: None Categories: None Non Competing Continuation Status: Not Required Due Date:		Actions Award Summary Contact Management View Report Forms Change Project Locale Manage Commitment Terms & Conditions Send Message Manage Project Abstract Risk Assessment Task Management Closeout Checklist Mark Grant Closed			
Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0068	Orange-testing	03/03/2011	08/05/2011	Complete (Post Award)	[Icons]

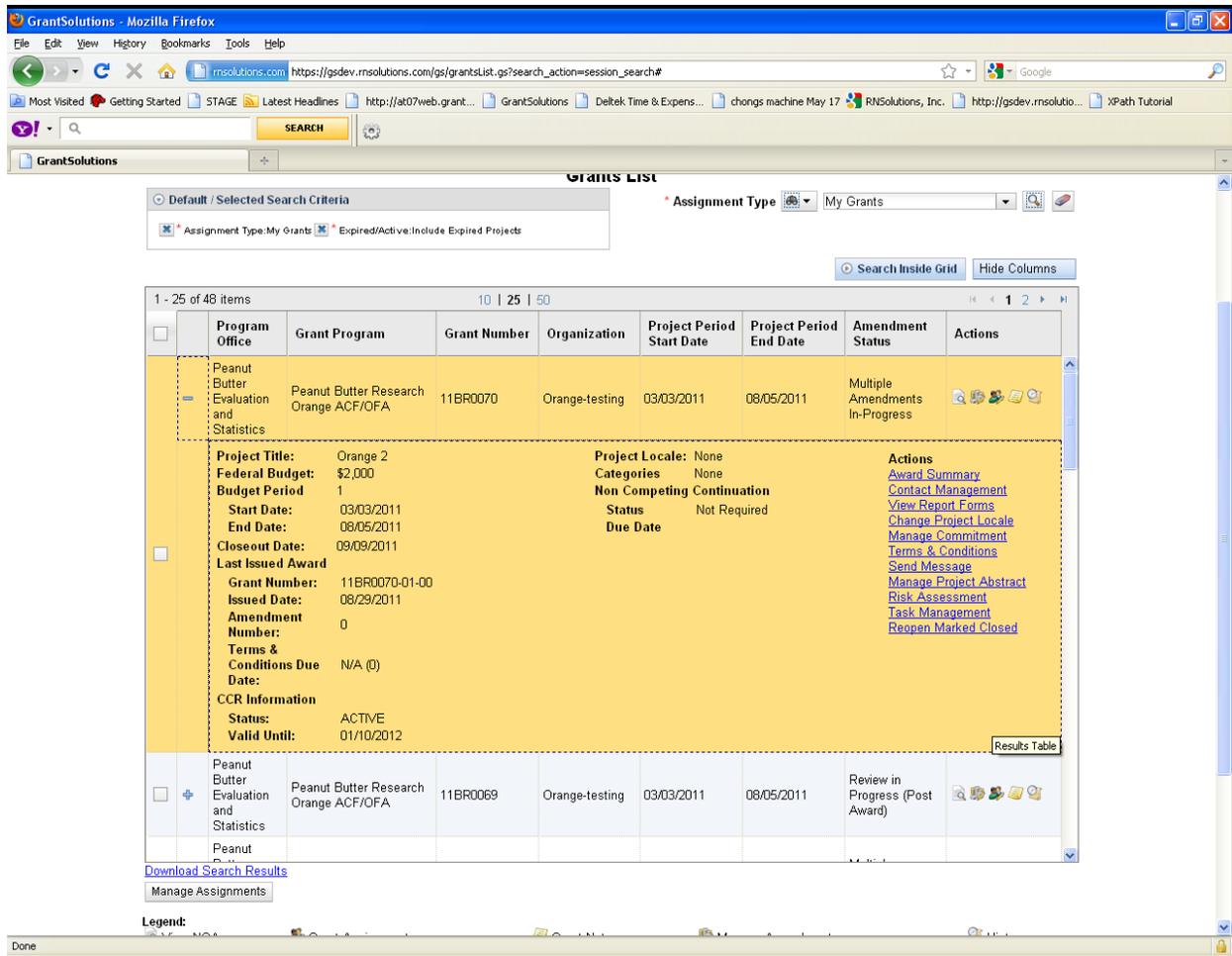
Click the “Mark Grant Closed” link, a confirmation message will be displayed. The user selects OK to continue or Cancel to abort action.

Message from webpage

This will close the selected grant without an award action and will not send the transaction to accounting. Do you want to continue?

After clicking ok, user is returned to the original search results screen.

Displayed in the details of the grant project just marked closed will be the Reopen Marked Closed grant. Notice that the Closeout Date is displayed.



X. Reopen a Grant Marked Closed

If an error in Marking a Grant Closed has occurred or there is a reason to reopen the grant, click the Reopen Marked Closed link which is displayed in the details of the grant project record.

GrantSolutions - Mozilla Firefox

https://gsdev.rnsolutions.com/gs/grantsList.gs?search_action=session_search#

GrantSolutions

Grants List

Assignment Type: My Grants

Search Inside Grid Hide Columns

1 - 25 of 48 items 10 | 25 | 50

<input type="checkbox"/>	Program Office	Grant Program	Grant Number	Organization	Project Period Start Date	Project Period End Date	Amendment Status	Actions
<input type="checkbox"/>	Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0070	Orange-testing	03/03/2011	08/05/2011	Multiple Amendments In-Progress	<ul style="list-style-type: none"> Award Summary Contact Management View Report Forms Change Project Locale Manage Commitment Terms & Conditions Send Message Manage Project Abstract Risk Assessment Task Management Reopen Marked Closed
<input type="checkbox"/>	Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0069	Orange-testing	03/03/2011	08/05/2011	Review in Progress (Post Award)	<ul style="list-style-type: none"> Award Summary Contact Management View Report Forms Change Project Locale Manage Commitment Terms & Conditions Send Message Manage Project Abstract Risk Assessment Task Management Reopen Marked Closed

Download Search Results

Manage Assignments

Legend:

The action of clicking on the Reopen Marked Closed link will return the user to the original search results screen.

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File Edit View History Bookmarks Tools Help

https://gsdev.rnsolutions.com/gs/grantsList.gs?search_action=session_search

SEARCH

GrantSolutions

Page Help

Grants List

Default / Selected Search Criteria

Assignment Type: My Grants | My Grants

Assignment Type: My Grants | Expired/Active: Include Expired Projects

Search Inside Grid | Hide Columns

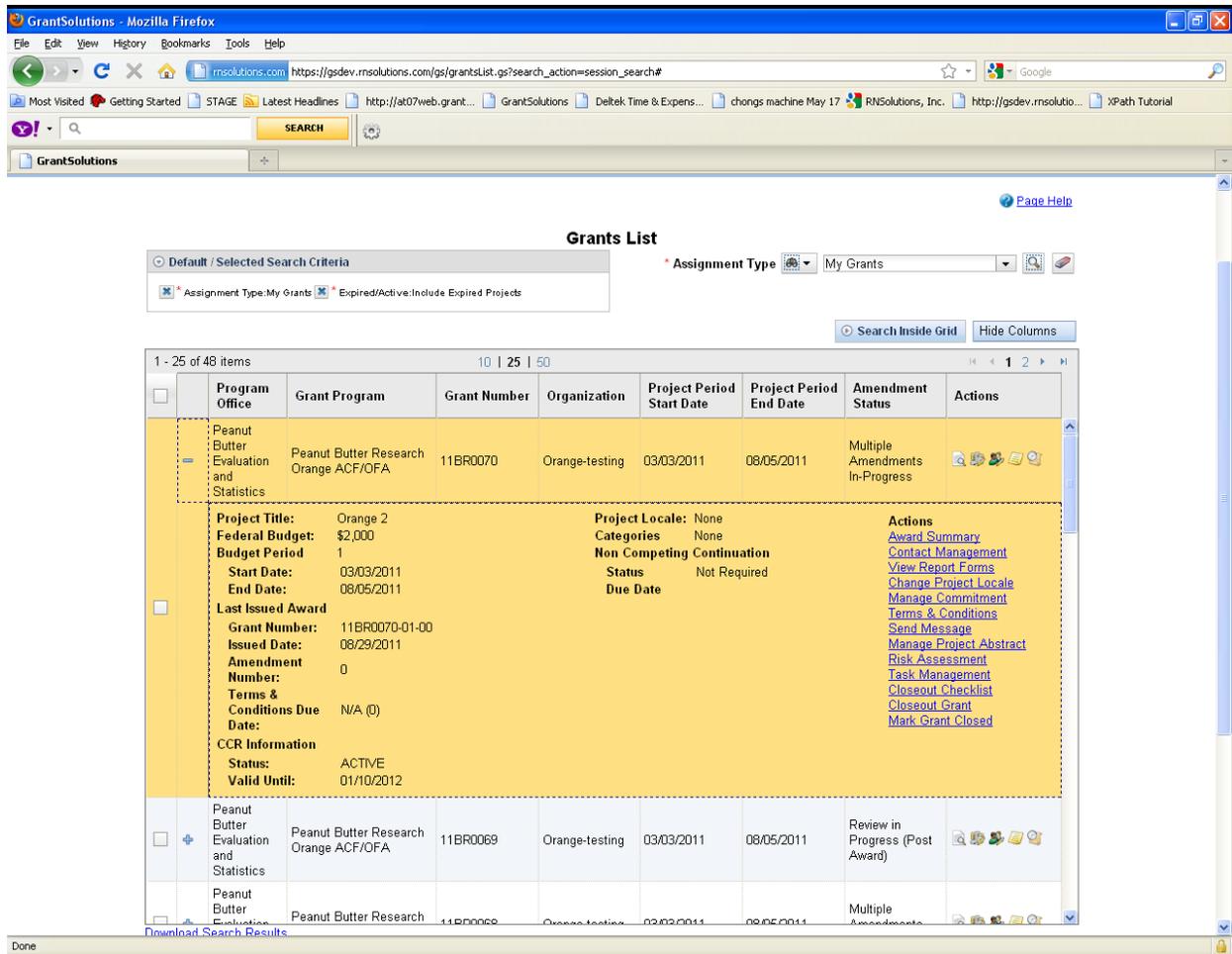
1 - 25 of 48 items | 10 | 25 | 50

<input type="checkbox"/>	Program Office	Grant Program	Grant Number	Organization	Project Period Start Date	Project Period End Date	Amendment Status	Actions
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0070	Orange-testing	03/03/2011	08/05/2011	Multiple Amendments In-Progress	
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0069	Orange-testing	03/03/2011	08/05/2011	Review in Progress (Post Award)	
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0068	Orange-testing	03/03/2011	08/05/2011	Multiple Amendments In-Progress	
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0067	Orange-testing	03/03/2011	08/05/2011	Review in Progress (Post Award)	
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0066	Orange-testing	03/03/2011	08/05/2011	Submitted (Post Award)	
<input type="checkbox"/>	+ Peanut Butter Evaluation and Statistics	Peanut Butter Research Orange ACF/OFA	11BR0065	Orange-testing	03/03/2011	08/05/2011	Received (Post Award Paper Submission)	

Download Search Results

Done

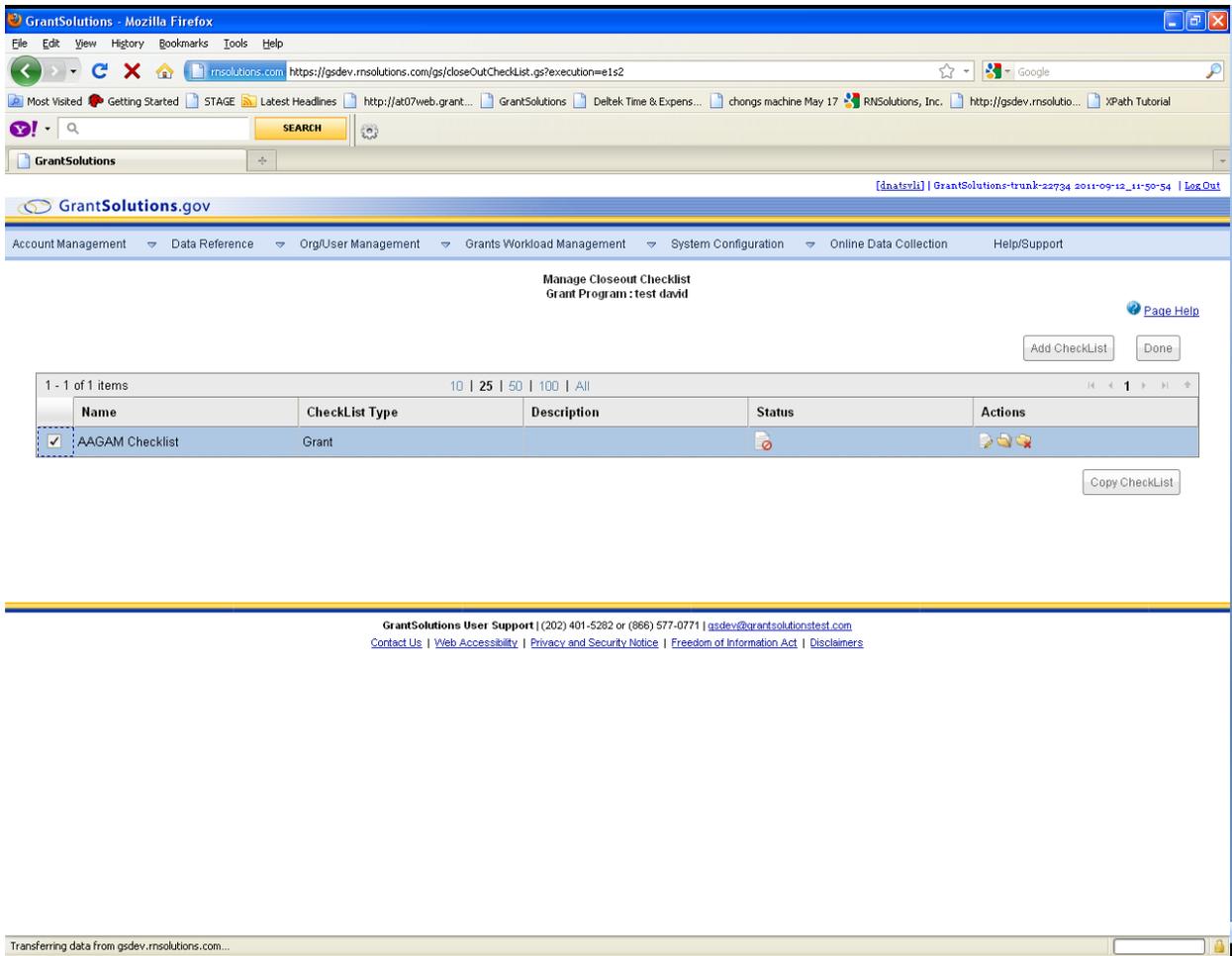
If you open the grant project details, the user will note that the Closeout Date has been removed and that the Closeout Checklist and the Mark Grant Closed links are displayed.



XI. Copy a Checklist to Another Grant Program

As Administrator, to copy a checklist to another grant program:

- Search and locate Checklist to be copied
 - From main menu: Grant Workload Management > Programs > Search > Manage Grant Programs > Manage Questions > Configure Closeout Checklist > Manage Closeout Checklist screen
 - Select the Checklist to be copied by marking the checkbox to the left of the Checklist Name;
 - Click on Copy Checklist button on bottom right of screen;
 - Select the checklist to be copied by filling in the checkbox to the left of the checklist name
 - Click the Copy Checklist button.



A pop-up window is displayed; choose the destination grant program of the copied Checklist and click the Copy button.

GrantSolutions - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://gsdev.rnsolutions.com/gscloseOutCheckList.gs?execution=e1s2

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Account Management Data Reference Org/User Management Grants Workload Management System Configuration Online Data Collection Help/Support

Manage Closeout Checklist
Grant Program : test david

Page Help

Add CheckList Done

1 - 1 of 1 items 10 | 25 | 50 | 100 | All

Name	CheckList Type	Description	Status	Actions
<input checked="" type="checkbox"/> AAGAM Checklist	Grant			

Copy CheckList

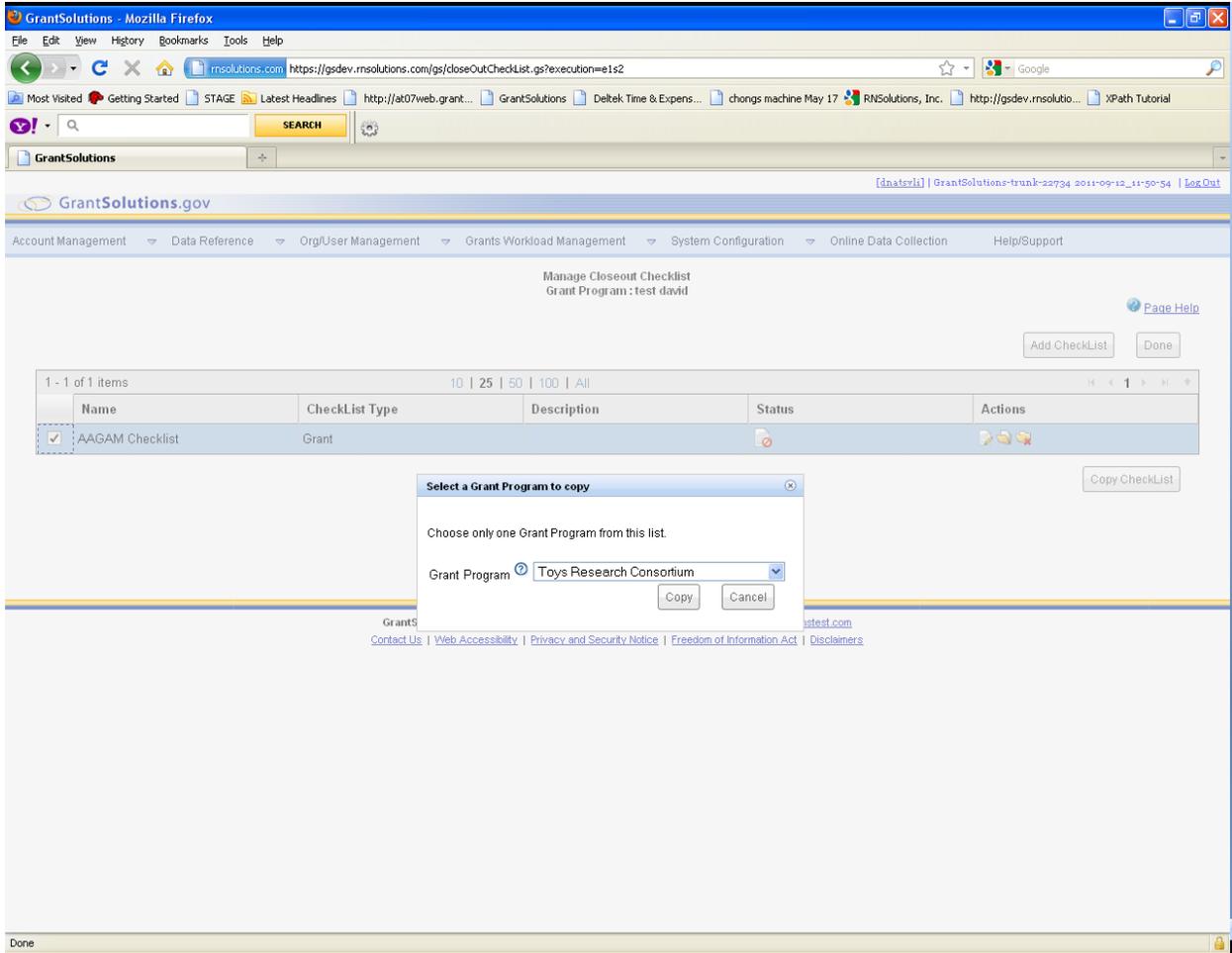
Select a Grant Program to copy

Choose only one Grant Program from this list.

Grant Program

- Please select...
- test2
- Protection of Toys
- test1
- Toys Planning and Assistance
- Toys and Games Research Consortium
- teeest
- test
- Copy of test
- this is a second test for active field
- test david
- this is a test for active field
- test for nish
- Toys Research Consortium

Done

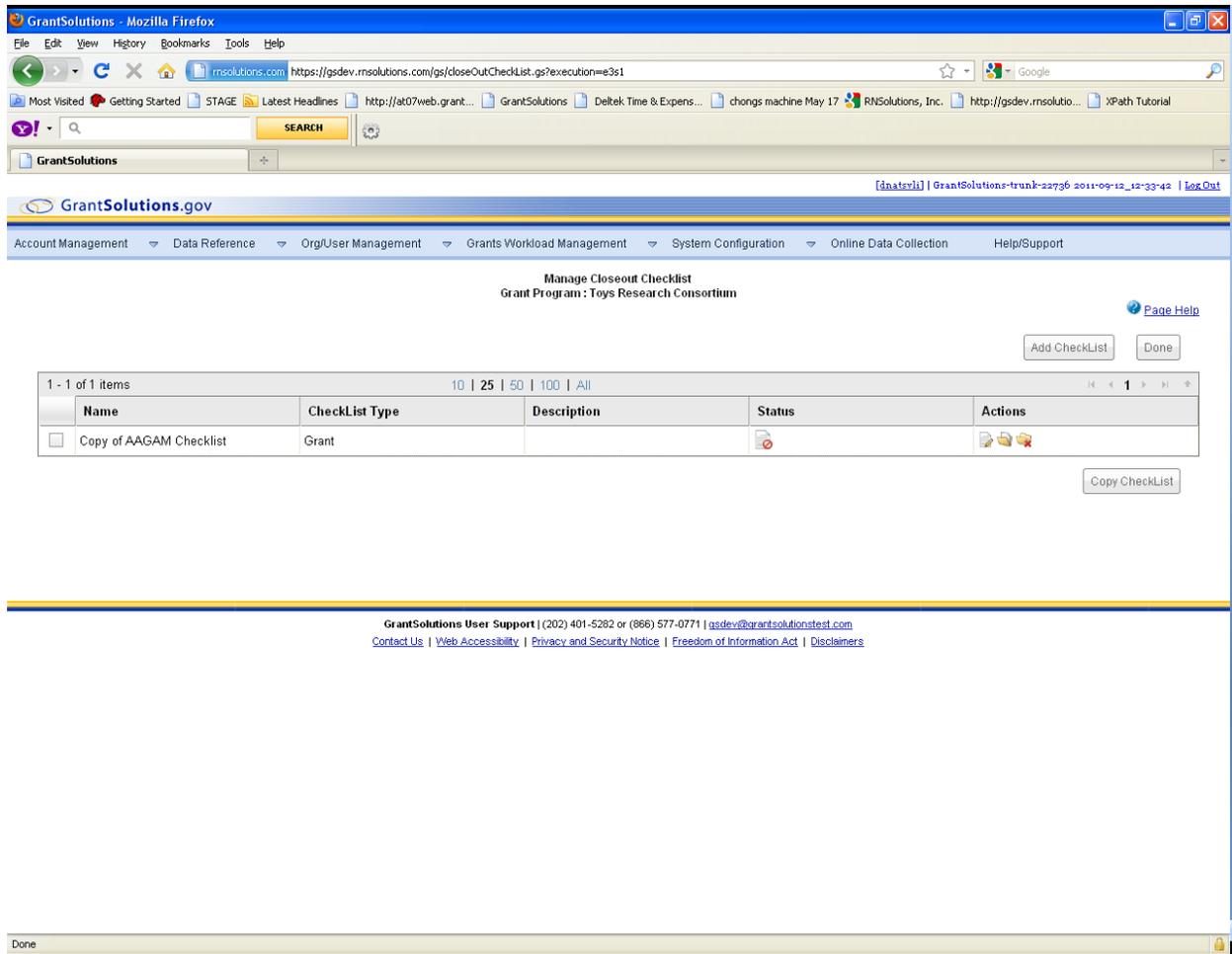


User will be returned to previous screen.

Navigate to the Manage Closeout Checklist screen to verify Checklist has been copied.

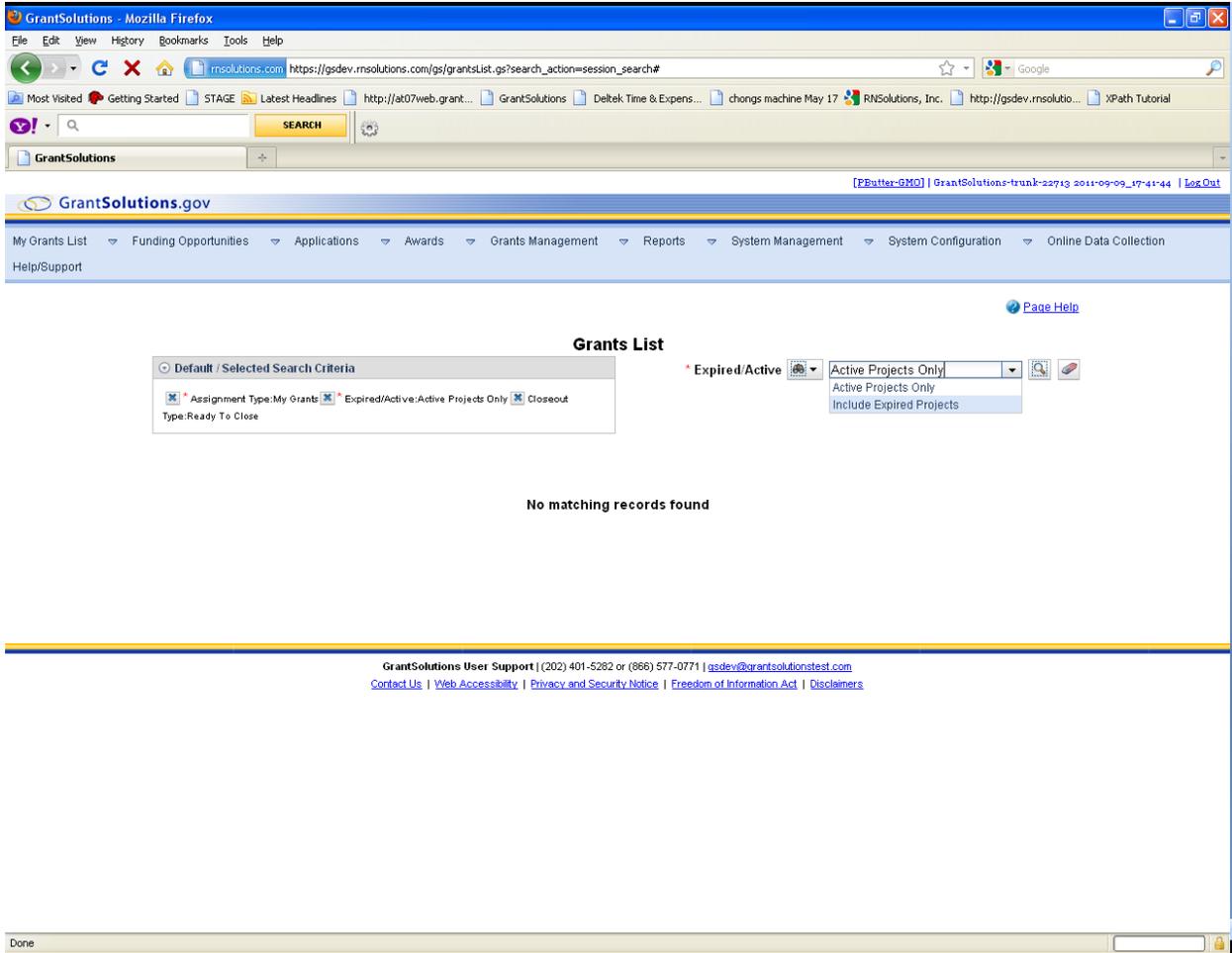
From main menu: Grant Workload Management > Programs > Search > Locate grant program the checklist has been copied to and click on Configure Closeout Checklist.

Displayed will be the Checklist identified as a "Copy of [Name of Original Checklist]." User may edit to change the Name of the Checklist.



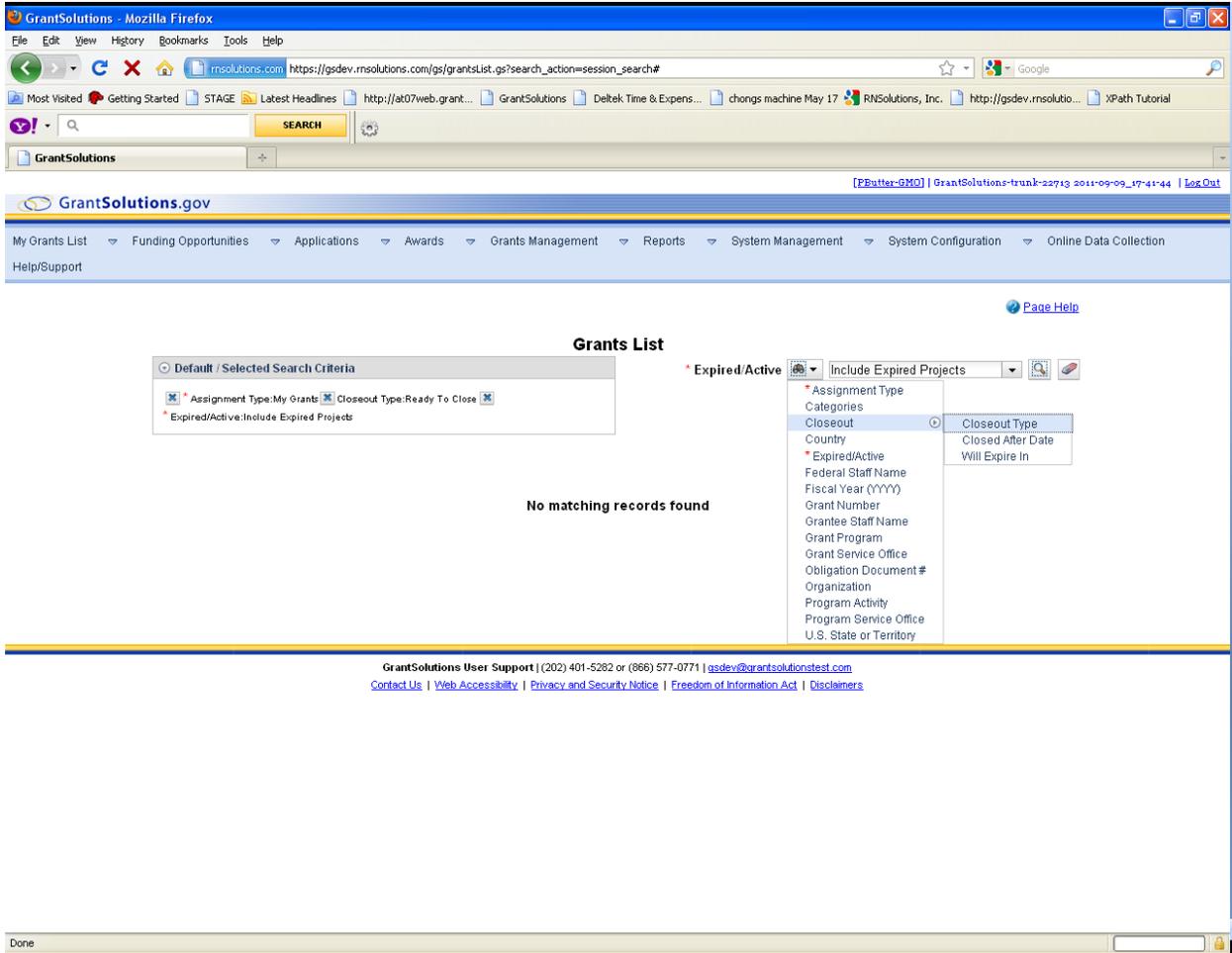
XII. Searches Available Related to Grant Closeout

All searches related to grant closeout must first use the “Include Expired Projects” filter.

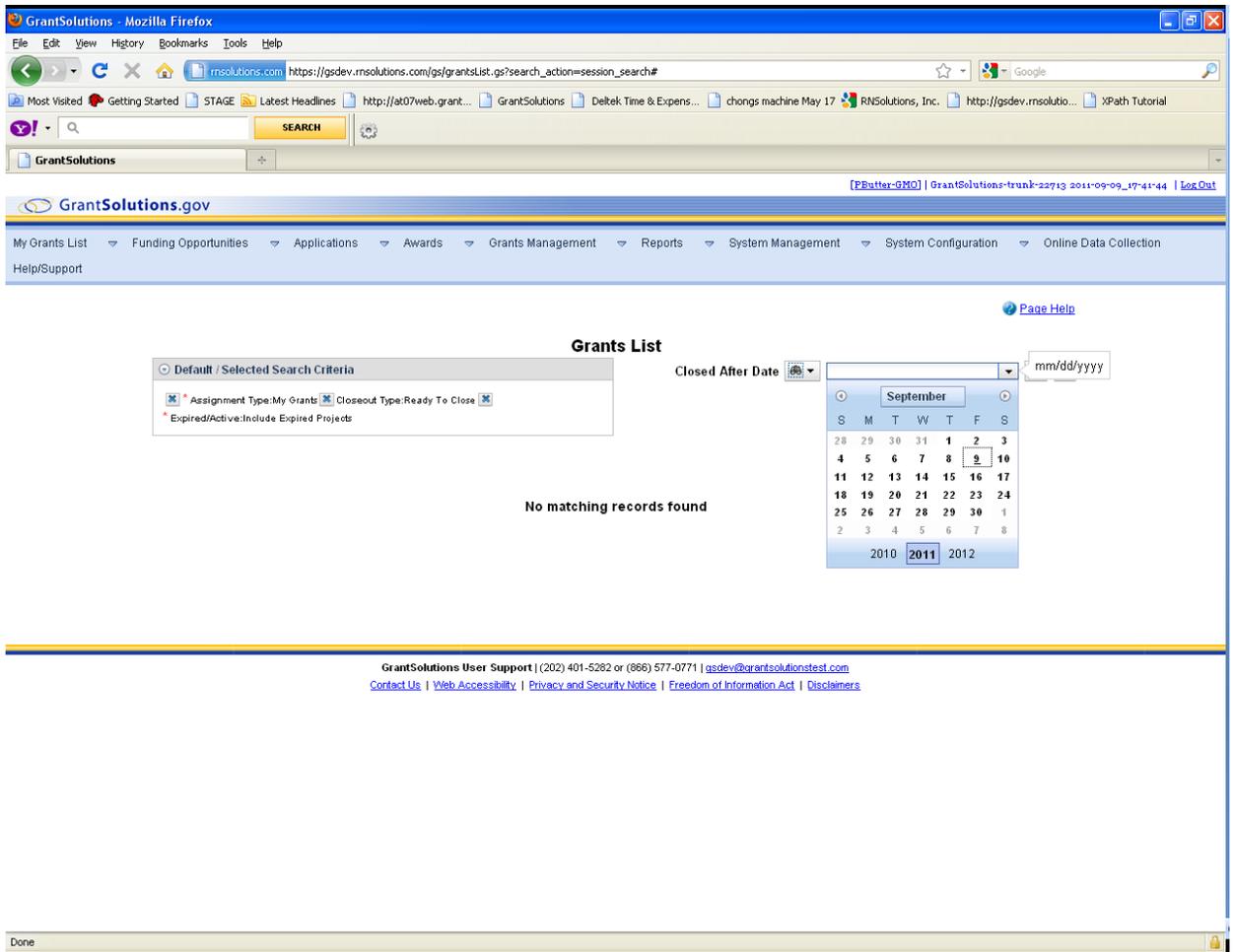


One filter is named Closeout, which includes the following sub-filters:

- Closeout type includes additional filters for
 - All Closed
 - Marked as Closed
 - Ready to Close



- Closed After Date: User will enter a date from a calendar displayed for this filter



- Will Expire In
 - 30 days
 - 60 days
 - 90 days

GrantSolutions - Mozilla Firefox

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https://gsdev.rnsolutions.com/gs/grantsList.gs?search_action=session_search#

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Grants List

Default / Selected Search Criteria

- Assignment Type: My Grants Closeout Type: Ready To Close
- Expired/Active: Include Expired Projects

Will Expire In

- 30 Days
- 60 Days
- 90 Days

No matching records found

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