

QUICK REFERENCE GUIDE

November 1, 2019

Close and Reopen Grant Projects

This guide covers how to change a grant Project Status. The Project Status is used to close or reopen the project.

After all of the costs have been processed through, including the General Ledger journals for those items, the grant project should be closed (inactivated).

Closing or reopening a grant involves changing the grant Project Status. When you change the project status to “Close”, the project is inactivated and no transactions can be processed for the grant. In order to process additional transactions for the grant, you will need to change the project status back to “Open”.

Note: If you attempt to enter a status with a date outside of the Project Start and End Date, you will receive a warning; however, you will be able to save the status.

Before changing the Project Status to “Closed”, you may want to use the “Pending Close” status to limit the transactions that can be processed for the grant project. A complete Status listing is provided in this guide.

Step 1: Update the Project Status

1. Navigate to the *Award Profile* page using one of the options below:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Awards. The Award Profile page displays by default.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left-menu, Links section, Maintain Award, Award Profile.

2. At the *Award Profile* page, verify the *Business Unit* and enter the *Award ID* for the award you want to update. (You can also search by Project ID, Description, and Proposal ID.)

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Award Profile

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ **Search Criteria**

Business Unit

Award ID

Project

Description

PI ID

Proposal ID

Case Sensitive

[Basic Search](#)

3. Click on the **Search** button. The *Award Profile* page displays.
4. If necessary, click on the *Award ID* in the **Search Results** section. The *Award Profile* page displays.
5. Click on the *Project* link in the **Associated Project** section.

[Award](#) | [Funding](#) | [Resources](#) | [Certifications](#) | [Terms](#) | [Milestones](#) | [Key Words](#) | [Funding Inquiry](#)

Award ID R320000118
 Reference Award Number 15ACHMN0010001-17 × Federal Award Identification Number

Title CNCS AmeriCorps and ServeMinnesota 17-18
 Long Description CNCS AmeriCorps and ServeMinnesota 17-18
 214 characters remaining

Award PI Carroll,Linda [Reporting Role](#)

Sponsor Corp for National and Community Service
 Post Award Administrator
 Purpose
 Status Accepted
 Award Type Grant
 CFDA
 Proposal ID R320000118
 Version ID V101
 Start Date 08/01/2017
 End Date 09/30/2018

[View Contract](#) | [View Proposal](#) | [Additional Information](#) | [Grant Administrator](#) | [Sponsor Website](#)

Primary Project PI Carroll,Linda

Associated Project [Personalize](#) | [Find](#) | First 1 of 1 Last

PC Business Unit	Project	Description
R3201	R32GT0000000118	CNCS AmeriCorps and ServeMinne

Go To: [Sponsor](#) | [Protocols](#) | [Attributes](#) | [Department Credit](#) | [Notepad](#) | [Award Modifications](#) | [Sup](#)

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- The *Project General Information* page displays showing the current Project Status. In this example, the Project Status is “Open”.

Project R32GT0000000118

Add to My Projects

*Description: CNCS AmeriCorps and ServeMinne [] Program Processing Status: Active
Project Status: Open

*Integration: STANDARD Standard Integration Template

*Project Type: FEDSG 511002-Federal Sub-grants

Percent Complete: 0.00 As Of

Project Health: As of Date Contract Number: R320000

Project Schedule

*Start Date: 08/01/2017 Control Start Date: 08/01/2017 *End Date: 09/30/2018 Control End Date: 09/30/2018

Description

Date/Time Stamp: 08/03/17 9:13:48AM User ID: 00770099

Description: CNCS AmeriCorps and ServeMinnesota 17-18

214 characters remaining

Long Description: CNCS AmeriCorps and ServeMinnesota 17-18

- To change the *Status*, click the link that indicates the current *Status*. The *Status* page displays, showing the current *Status* and the *Effective Date* when that *Status* was activated. The *Status* changes are maintained in separate rows. This enables SWIFT to maintain a history of the project *Status*.

Status

Project R32GT0000000118 Description CNCS AmeriCorps and ServeMinne

Project Status

Effective Date: 08/03/2017 Sequence: 0

*Status: O Open

Priority: 0

Interest Calculation Factor: 0.00

Comments

Return to Project General

Save Return to Search Notify Refresh Update/Display Include History

- To change the *Status*, click on the **Add New Row (+)**. A new row is added before the existing row. Notice that the new row is row 1 of 2 and the fields are now open to edit.

Status

Project R32GT000000118 Description CNCS AmeriCorps and ServeMinne

Project Status 1 of 2 | View All

Effective Date

*Status

Priority

Interest Calculation Factor

Comments

Sequence

Pending Close

[Return to Project General](#)

8. By default, the *Effective Date* is the current date. You can change the *Effective Date* to a future date to set the change to happen then.
9. Click on the *Status Lookup* and select a new *Status*. Status Codes are described below. For this example, the status will be changed to “Pending Close – X”.

Status	Description
C - Closed	Process Status: C – Inactive When a project is closed, it is not available for selection or processing.
O - Open	Process Status: O – Active
P - Pending	WARNING! Don't Use. Projects start in this status but cannot be changed to this status.
H - Hold	Process Status: H – Inactive When a project is on hold, you cannot process transactions for this project.
X – Pending Close	Process Status: X – Active This status allows General Ledger and Accounts Payable transactions only to be applied to the contract. Requisitions or Purchase Orders cannot be created for a project in Pending Close status. This does not prevent transactions from being processed in Billing and Accounts Receivable modules.

Status	Description
Z – Pending Close – GL Only	<p>Process Status: Z – Active</p> <p>Project Status Z (Pending Close-GL Only) allows only General Ledger transactions to be applied to the project; this does not include payroll journals from SEMA4. Vouchers, purchase orders, and requisitions are also not allowed to be entered. This may be used for end-of-year adjustments to be made in the General Ledger, or for the creation of GL journals from module transactions on the last day of the projects.</p> <p>This does not prevent transactions from being processed in the Billing and Accounts Receivable modules.</p>

- The Sequence, Priority, and Interest Calculation Factor fields are not used in Minnesota.

10. Optionally, enter a *Comment*.

11. Click on the **Save** button. If you entered a status with a date outside of the Project Start and End Date, you will receive a warning; however, you will be able to save the status.

Warning -- Date: 2018-11-13 is not between Project Start date: 2018-12-01 and Project End date: 2022-11-30. (13100,495)

Please change date or modify Project Start or End dates.

12. Click on the *Return to Project General* link to return to the **General Information** tab of the Project.

The screenshot shows the 'General Information' tab for Project R32GT000000118. The 'Processing Status' is 'Active', and the 'Project Status' is 'Pending Close', which is highlighted with a red box. Other fields include:

- *Description: CNCS AmeriCorps and ServeMinne
- *Integration: STANDARD
- *Project Type: FEDSG
- Percent Complete: 0.00
- Project Health: As of Date
- Contract Number: R320000
- Project Schedule: *Start Date 08/01/2017, Control Start Date 08/01/2017, *End Date 09/30/2018, Control End Date 09/30/2018
- Description: CNCS AmeriCorps and ServeMinnesota 17-18

- The project **General Information** tab now reflects the new project *Status*.