9.2 Closing or Reopening a Grant or Project

Purpose: Reference this QRG to learn how to close a Grant Award at the 'Project' or 'Activity' levels and reopen/reactivate them in the ctcLink Grants Module.

Audience: Finance/Grant Fiscal Staff.

⊗   You must have at least one of these local college managed security roles:

- ZC Awards Processing
- ZZ Awards Processing

    If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

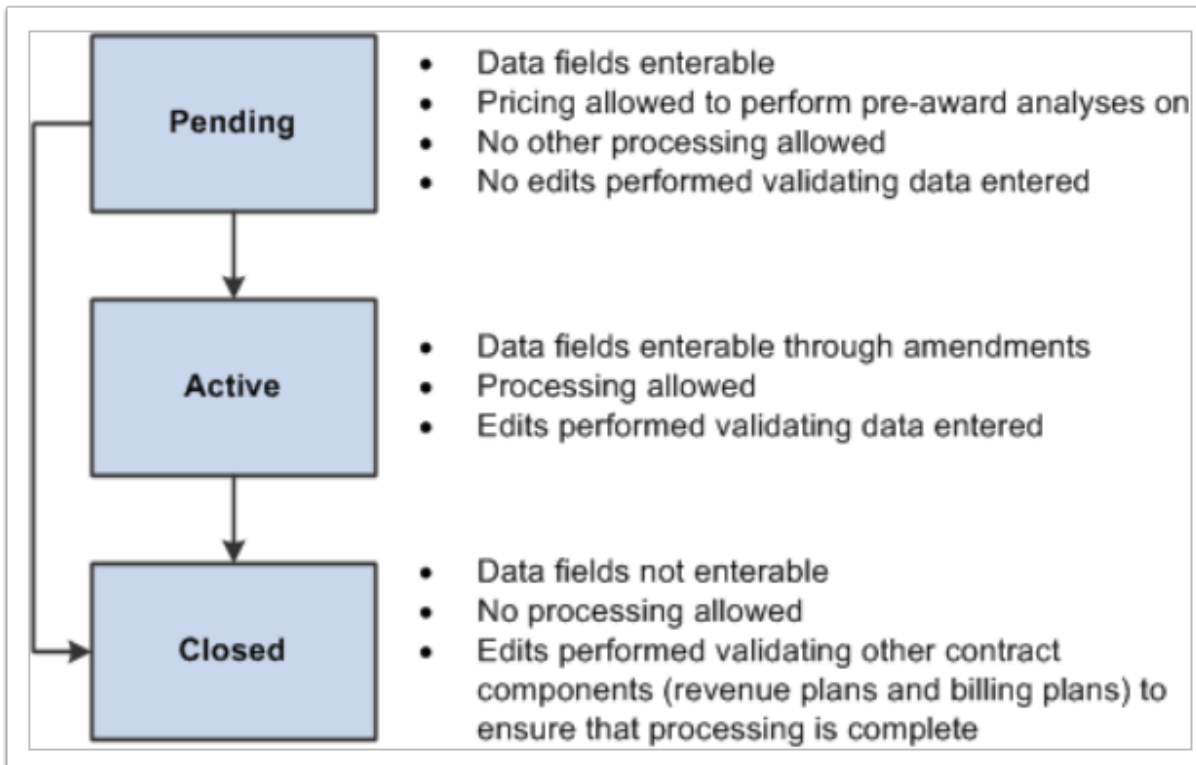**When should you close a Project or Activity?**

You can control incoming transactions at the project or activity level. Projects and activities that have an inactive processing status do not appear in the prompt lists of PeopleSoft cost feeder systems. Inactivating a project or activity effectively shuts off the flow of all transactions to Project Costing for that particular project or activity. Projects/Activities can be inactive and then made active again if necessary.

When should you close a Contract?

It is rarely recommended that you close a Contract. Closing Contracts is a one way flow; once a Contract is closed it cannot be re-opened, which will limit your ability to bill for any previously unknown expenses. There are no systems checks that prohibit you from changing the status of a contract from Pending to Closed. Closing at the Project or Activity level is recommended.

Closing a Grant or Project

> ❗ Suggested to never close a Contract. Once a Contract ID# is closed, it can never be opened again. Closing at the Project or Activity level is recommended.
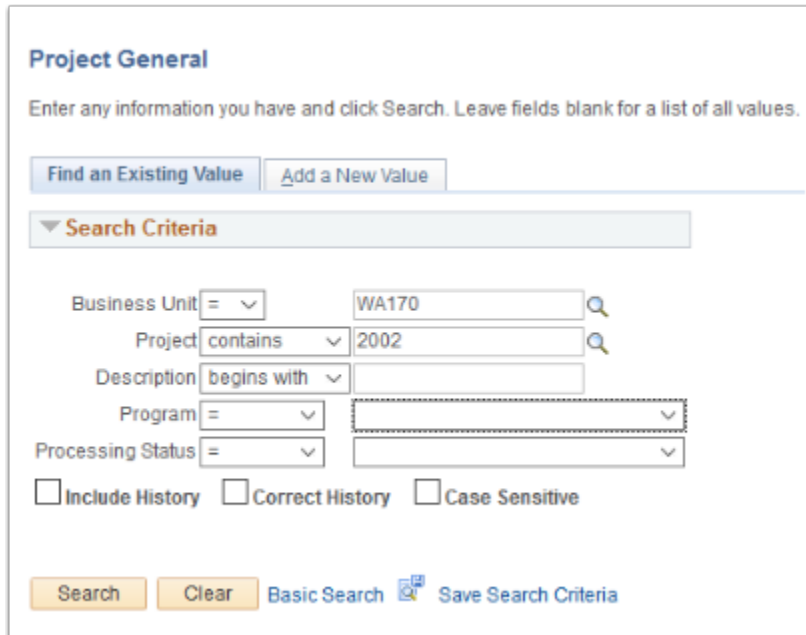
Pending
- Data fields enterable
- Pricing allowed to perform pre-award analyses on
- No other processing allowed
- No edits performed validating data entered

Active
- Data fields enterable through amendments
- Processing allowed
- Edits performed validating data entered

Closed
- Data fields not enterable
- No processing allowed
- Edits performed validating other contract components (revenue plans and billing plans) to ensure that processing is complete

Closing Best Practices

> 💡 Closing a Project or Activity ensures that no additional expenses or other transactions can occur for that Projector Activity.
> - Before closing a Project or Activity, reconcile your actual expenses to reimbursements/revenues received. Make any adjustments needed prior to closing of the fiscal year and also the closing of project and/or activity. When a project or an activity is closed, no further adjustments can be made unless it is re-opened.
> - In the Contract you can reduce the Billing Limit to zero and keep the Contract open in case a transaction is inadvertently associated with a project. It is best to keep Contracts active and close them at the Project or Activity level.

Closing an Award at the Project Level

Navigation: NavBar > Navigator > Grants > Awards > Project

1. On the **Project General** search page, enter or look up the **Business Unit.**
2. Enter or look up the **Project**.
3. Select **Search**. The **Project General** page will display.

4. On the **General Information** tab, select the **Project Status link** "**Open**". The **Status** Page will display.

5. Select the **plus sign (+)** icon.

6. Enter an **Effective Date**, Change the **Status** (a comment can be added if needed).
7. Select **Save**.
8. Select the **Return to Project General** link.

Status

Project 0000002002   Description Proposal Title

Project Status   🔍 | ◄ ◄ 1 of 2 ▾ ► ►| | View All

Effective Date 09/10/2018 📅   Sequence 0   ➕ ➖

*Status C 🔍   Closed

Priority 0

Interest Calculation Factor 0.00

Comments

Return to Project General

Save   Return to Search   Notify   Refresh   Update/Display   Include History

⚠ You may receive a warning message, this message is just informing you of the start and end date of the project as determined in the proposal.

Warning -- Date: 2020-09-10 is not between Project Start date: 2018-09-01 and Project End date: 2020-08-31. (13100,495)

Please change date or modify Project Start or End dates.

OK   Cancel

9. Note that the **Project Status link** is now "**Closed**"

> 💡 If you need to reopen a project you can do the same steps as above, but select a status of **Open (O).**
> - It is suggested that the open date be the day after the close date.
> - Projects can be closed and opened as many times as needed.

Closing an Award at the Activity Level

Navigation: NavBar > Navigator > Grants > Awards > Project Activity

1. On the **Project Activity** search page, enter or look up the **Business Unit.**
2. Enter or look up the **Project**.
3. Select **Search**. The **Project Activity** page will display

4. On the **General Information** tab, select the **Processing Status** to inactivate the activity.
5. Select **Save**.

> 💡 You can then make an activity active or inactive as many times as needed.

6. Note that the **Processing Status** is now "**Inactive**".

7. Process complete.

> 💡 If you need to reopen an activity you can do the same steps as above, but select a status of Active.
> • Activities can be inactivated and reactivated as many times as needed.