

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 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 would 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.
3. Select the **Search** button.

4. Select the Award ID in the **Search Results** section.

Search Results
1 rows - Business Unit "H5502" Award ID "H550000093"

Business Unit	Award ID	Project	Description	PI ID	Proposal ID	Reference Award Number
H5502	H550000093	H55101477	Adoption Incentive Payment	01144883	H550000093	1001MNAIPP

5. The Award Profile page displays. Scroll down the page and select the Project link in the **Associated Project** section.

Associated Project

PC Business Unit	Project	Description	Project Start Date	Project End Date	Commitment Control Begin Date	Commitment Control End Date
H5502	H55101477	Adoption Incentive Payment	07/01/2010	12/31/2012	07/01/2010	09/30/2012

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

6. The Project General Information page displays showing the current Project Status. In this example, notice "Pending" in the Project Status field. To change the Status, select the hyperlink of the current Project Status.

General Information | Project Department | Project Costing Definition | Manager | Location | Phases | Approval | Justification >

Project H55151407 Add to My Projects

*Description: Adoption Assistance Program Processing Status: Pending

*Integration: STANDARD Standard Integration Template **Project Status: Pending**

*Project Type: FED 511001-Federal Revenue

Percent Complete: 0.00 As Of

Project Health: As of Date

- The Status page displays, showing the current Status and the Effective Date when that Status was activated. Status changes are maintained in separate rows. This enables SWIFT to maintain a history of the Project Status.
- To change the Status, select the **Add New Row (+)** icon.

Status

Project H55151407 Description Adoption Assistance

Project Status | | 1 of 1 | View All

Effective Date: 10/27/2014 Sequence: 0 **+**

*Status: P Pending

Priority: 0

Interest Calculation Factor: 0.00

Comments:

[Return to Project General](#)

Save | [Return to Search](#) | [Previous in List](#) | [Next in List](#) | [Notify](#) | [Refresh](#) | [Update/Display](#) | [Include History](#)

- A new row is added. Notice that the new row is row 1 of 2 and the fields are now open to edit.
- By default, the Effective Date is the current date. You can change the Effective Date to a future date for the status change.
- Select the **Status Lookup** icon to select a new status. Status. Status Codes are described below. In this example, we select "O - Open" for the new status.

Status	Description
C - Closed	Process Status: Closed/Inactive. When a project is closed, it is not available for selection or processing.
O - Open	Process Status: Open/Active
P - Pending	WARNING! Don't Use. Projects start with a pending status but cannot be changed to this status.

Status	Description
H - Hold	Process Status: Inactive. When a project is on hold, you cannot process transactions for the project.
X – Pending Close	Process Status: 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.
Z – Pending Close – GL Only	Process Status: Active. This status 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. This does not prevent transactions from being processed in the Billing and Accounts Receivable modules.

- Optionally, enter a Comment.
- Select the **Save** button.

Status

Project H55151407 Description Adoption Assistance

Project Status 1 of 2 View All

Effective Date 02/13/2024 Sequence 0 + -

*Status 0 Open

Priority 0

Interest Calculation Factor 0.00

Comments sample comments

Return to Project General

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History

- 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: 2024-06-30 is not between Project Start date: 2012-10-01 and Project End date: 2017-12-31. (13100,495)

Please change date or modify Project Start or End dates.

OK Cancel

15. Select the Return to Project General link to return to the **General Information** page of the Project. The project **General Information** page now reflects the new Project Status.

<u>General Information</u>	Project Department	Project Costing Definition	Manager	Location	Phases	Approval	Justification	>
Project	H55151407							Add to My Projects
*Description	<input type="text" value="Adoption Assistance"/>		<input type="checkbox"/> Program				Processing Status	Active
*Integration	<input type="text" value="STANDARD"/> <input type="button" value="Q"/>	Standard Integration Template						Project Status: Open
*Project Type	<input type="text" value="FED"/> <input type="button" value="Q"/>	511001-Federal Revenue						
Percent Complete	<input type="text" value="0.00"/>	As Of						