



State of Indiana eCivis Grants Network Post-Award User Guide

Grant Closeout in eCivis and PeopleSoft

August 2024

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Section 1 – Purpose

The purpose of this user guide is to ensure proper management and reconciliation of grants, along with other Federal and State resources received by Indiana State Agencies (e.g., Federal contracts and cooperative agreements, State match, etc.). Specifically, focusing on instructions for the closing out of these funds in eCivis Grants Network and PeopleSoft Financials.

Section 2 – Responsibility

Indiana State Agency heads, in coordination with Indiana State Agency fiscal and program staff employees, are responsible for the overall program and financial management of grant awards and other Federal and state resources. Indiana State Agency heads should meet at least quarterly with finance and program staff to ensure grants and other resources are meeting the objectives of the program. Additionally, the Agencies should reconcile these funds on a monthly basis to ensure that expenditures and revenues received are charged to the correct grant and Peoplesoft project.

In most cases, Federal grants are based on a reimbursement model. For these grants, an Indiana State Agency receives an appropriation in a Federal funding source (backed by State funds until the Federal funds are drawn). It is the Chief Financial Officer/ Controller's responsibility to make sure funds are drawn from the Federal awarding agency to reimburse the State funds.

Additionally, fiscal employees should actively monitor funds to make sure Federal reimbursements are requested at a minimum quarterly—although monthly Federal reimbursement is preferred when possible.

Section 3 – eCivis Projects

To ensure proper coordination between fiscal and program staff, it is a best practice for each eCivis project and grant in eCivis Grants Network to be administered by a **Project Team** comprised of at least one fiscal staff person and one program staff person. See Step 3 in [SOI User Guide - Grantee Pre-Award](#) for more information.

Section 4 – Closeout Conditions

Grants and other associated resources should be closed out in accordance with the requirements of their governing agreements and the applicable Code of Federal Regulations: [2 CFR 200.344\(b\) Closeout](#) or [45 CFR 75.381 Closeout](#).

All grants received by an Indiana State Agency must be closed out in eCivis Grants Network and PeopleSoft, once the conditions of the grant are satisfied.

The following are **programmatic requirements** that should be met before a grant or other resource is closed out:

- 1) The deliverables specified by the governing agreement have been accomplished including the submission of a final programmatic report, if required.
- 2) The program's objectives have, to the extent practicable, been achieved.
- 3) Any outstanding findings from program audits have been rectified.

Additionally, the following **financial requirements** should be met before a grant or other resource is closed out:

- 1) Final Report:
For grants and other resources where the Federal government is the awarding entity, the final Federal Financial Report (FFR) has been filed.
 - a. An equivalent final report, if required, has been filed for grants and other resources where the Federal government is not the awarding entity.
- 2) All financial transactions such as drawdowns, disbursements, and liquidations have been completed.
- 3) Any expenditure-matching requirements have been met.

Section 5 – Closeout Process

The steps below are to be followed to close out a project and grant in eCivis Grants Network and PeopleSoft Financials.

- 1) The closeout process begins with the programmatic closeout of eCivis Projects in eCivis Grants Network.
 - a. For those projects and grants/other resources where the term (period of performance/performance period/project period) has ended, at the **Contract Close** or **Contract Close Date** plus 1 day, the Agency eCivis user should start the closeout process.

- 2) On the **Project Dashboard**, the **Contract Close** task under the **Pending Tasks** section will be highlighted pink with the **Due Date** now in red font.

Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Contract Close	US17342: FY2022	Grant Awarded	A. Eulano	08/01/2023			<input type="checkbox"/>

- a. A Department Master Account Holder (DMAH) can run a **Tasks Report** under the **Reports** tab to see pending and past eCivis projects and grants that need to be closed out. See [Appendix A – Tasks Report: Contract Close](#) for instructions on running this report.



- b. For all other closeout conditions not related to the grant or other resource’s term ending, the Agency eCivis user can start the closeout process at any time.
- 3) The Agency eCivis user will click the box under the *Done* column for the **Contract Close** task on the **Project Dashboard**.

Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Contract Close	US4730: FY2023	Grant Awarded	C. Biehl	09/01/2027	08/01/2027		<input type="checkbox"/>

- 4) The **Contract Close** task is assigned to the **Project Lead**. The **Contract Close** date is established at **Grant Awarded** by the date entered by the Agency eCivis user as stated in the Notice of Award/agreement.
- a. To change the **Assigned To**, an Agency eCivis user must change the **Project Lead** to another **Project Team** member. To perform this action, the Agency eCivis user clicks *Lead* under **Project Team** and the **Change Project Lead** pop-up appears.

Overview Documents Grant Lifecycle Goals & Metrics Budgets Contracts & Accounts Spending History

Active Grants

US17342 Coronavirus Capital Projects Fund (CCPF): For States, Territories, and Freely Associated States - FY 2022

Stage: Grant Awarded Awarded: \$80,000,000.00 Match: \$0.00

Available Actions

- I would like to access details of this grant
- I would like to request an account setup
- I am ready to schedule my report
- This grant does not require a report

Project Team

Agency eCivis User **(Lead)** Grant Management

Project Lead Director

Designated for Approvals

User Groups

SBA Analyst - FSSA

- i. The **New Project Lead** dropdown menu lists all **Project Team** members; the Agency eCivis user clicks the desired **Project Team** member to be the **New Project Lead** and then *Change Project Lead*. This will cause the **Assigned To** for the **Contract Close** task to update to the new **Project Lead**.

Change Project Lead x

Current Project Lead: Agency eCivis User

New Project Lead: Project Lead

Change Project Lead Cancel

- b. Upon clicking the *Done* checkbox, the **Grant Status – Closeout** form will show. The Agency eCivis user only needs to click the *Save button* .

Grant Status - Closeout

Coronavirus Capital Projects Fund (CCPF): For States, Territories, and Freely Associated States - FY 2022

Complete Status Form

Grant: US17342 Coronavirus Capital Projects Fund (CCPF): For States, Territories, and Freely Associated States - FY 2022

Notes:

500 Characters Left

Upload Files

Attach Files:

Save Cancel

- c. This initiates the Closeout process and moves the eCivis project and grant to the **Grant Closeout** stage, but the eCivis Project and grant are not yet closed.

Overview Documents Grant Lifecycle Goals & Metrics Budgets Contracts & Accounts Spending History

Active Grants

US17342 Coronavirus Capital Projects Fund (CCPF): For States, Territories, and Freely Associated States - FY 2022

Stage: Grant Closeout Awarded: \$80,000,000.00 Match: \$0.00

Available Actions

Project Team







A. Eulano (Lead) Grant Management

J. Mistlebauer Director

Section 5a – Automatic Tasks at Grant Closeout

At **Grant Closeout**, four automatic tasks are generated by eCivis Grants Network:

- a. [1: Programmatic \(Activity\) Report - Submit & Upload.](#)
- b. [2: Liquidation Requirements Confirmation.](#)
- c. [3: Close PeopleSoft Project - Upload the Grant/Project Review Fund Source Activities Screenshot and Spreadsheet.](#)
- d. [4: Final Financial Report - Submit & Upload.](#)

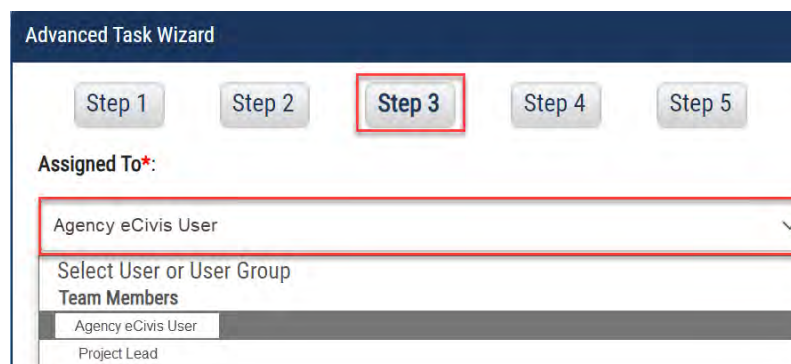
Task Name 	Grant	Stage	Assigned To	Due	Reminder	File(s)
1: Programmatic (Activity) Report - ...	ORG0119: FY2025	Grant Closeout	C. Schnick	08/09/2024		
2: Liquidation Requirements Confirm...	ORG0119: FY2025	Grant Closeout	C. Schnick	08/09/2024		
3: Close PeopleSoft Project - Uploa...	ORG0119: FY2025	Grant Closeout	C. Schnick	08/09/2024		
4: Final Financial Report - Submit ...	ORG0119: FY2025	Grant Closeout	C. Schnick	08/09/2024		

NOTE: The automatic tasks should be completed in the order stated.

"Assigned to" Project Team Members

For each of the four Automatic Tasks at Grant Closeout, a task may require reassignment to another **Project Team** member.

- 1) The **Project Lead** will click the respective *Task Name* to access the **Advanced Task Wizard** pop-up.
 - a. *Step 1* and *Step 2* buttons of the Advanced Task Wizard will be addressed later.
 - b. To choose from the **Team Members** under **Assigned To**, select *Step 3*.
 - c. Once a task is reassigned to another **Project Team** member, that **Project Team** member will be notified by eCivis Grants Network via email.



Advanced Task Wizard

Step 1 Step 2 **Step 3** Step 4 Step 5

Assigned To*:

Agency eCivis User

Select User or User Group

Team Members

Agency eCivis User

Project Lead

Additional task preparation is required prior to completing each closeout task.

For “1: Programmatic (Activity) Report - Submit & Upload.,” the **Project Lead** will click Closeout Task 1’s **Task Name** to access the **Advanced Task Wizard** pop-up.


Not all grants will have a “Final Programmatic (Activity) Report.”

- 1) If the grant *does not* have one, the **Project Lead** will still click “1: Programmatic (Activity) Report - Submit & Upload. under **Task Name**.
 - a. The **Advanced Task Wizard** pop-up will appear for the task and the **Project Lead** will click the *Delete button* **Delete** and proceed to [2: Liquidation Requirements Confirmation](#).

- 2) If a grant *does* have a Final Programmatic Report, click *Step 4* and change the **Due Date** to the stated date in the governing agreement for the final programmatic report.
 - a. If a date is not provided, the **Project Lead** will align the **Due Date** to the liquidation end date which is a part of “[2: Liquidation Requirements Confirmation](#).”.

- a.
 - b. The **Project Lead** will click *Step 5* and *Save* for those changes to take place.

“2: Liquidation Requirements Confirmation.” requires a similar process.

- a. The **Project Lead** will click the **Task Name** to access its **Advanced Task Wizard**.
- b. This task should be assigned to the fiscal employee on the Project Team.
- c. The **Project Lead** can click *Step 4* and change the **Due Date** to the stated date in the governing agreement.
 - The governing agreement dictates the date or time allowed to liquidate.
 - The Prime Recipient must review the Federal regulations governing their award to determine the Contract Close/Contract Close Date. Typically, Recipients have 90 or 120 calendar days, depending on the applicable Federal regulation ([45 CFR 75.381 Closeout](#) or [2 CFR 200.344\(b\) Closeout](#)).
 - For assistance with calculating a date, an Agency eCivis user can use this link: [Date Calculator](#).
- d. The **Project Lead** will click *Step 5* and the *Save button*  .


“3: Close PeopleSoft Project - Upload the Grant/Project Review Fund Source Activities Screenshot and Spreadsheet.” will need to be assigned to the fiscal employee on the **Project Team**.

- a. The **Project Lead** will click the *Task Name* to access its **Advanced Task Wizard**.
- b. The **Project Lead** can click *Step 4* and change the **Due Date** to the stated date in the governing agreement.
 - If a date is not provided, the **Due Date** should align with the date in [Task 2](#).

NOTE: [The Project Costing Bulletin #1: Closing a Federal Project](#) is attached to this task and can be downloaded to assist the fiscal **Project Team** member.

- c. The **Project Lead** will click *Step 5* and the *Save button*  .

“4: Final Financial Report - Submit & Upload.” will require the same actions.

- a. The **Project Lead** will click the *Task Name* to access its **Advanced Task Wizard**.
 - This task needs to be assigned to the fiscal employee on the **Project Team**.
- b. Not all grants will have a Final Financial Report.
 - If the grant does not have one, the **Project Lead** will still click the Closeout “4” Task Name and click the *Delete button*  and proceed to [Section 5b](#).
- c. The **Project Lead** can click *Step 4* and change the **Due Date** to the stated date in the governing agreement for the Final Financial Report.
 - If a date is not provided, the **Due Date** should align with the date in [Task 2](#).
- d. The **Project Lead** will need to click on *Step 5* and *Save* on that page for those changes to take place.

Now all Closeout tasks are set.

Section 5b – Completing Closeout Tasks

Once Grant Closeout Automatic Tasks have been edited, it is time to complete them.

[1: Programmatic \(Activity\) Report - Submit & Upload.](#)


[2: Liquidation Requirements Confirmation.](#)

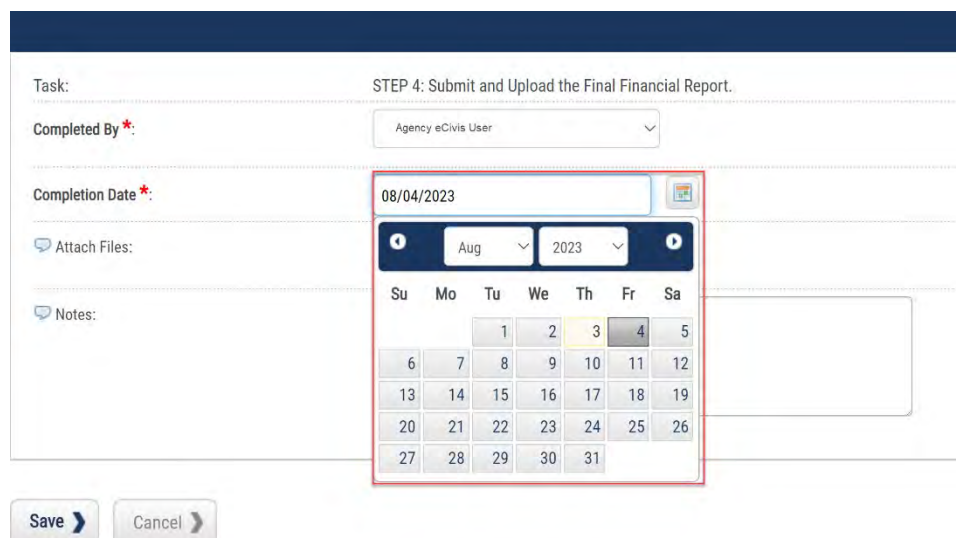
[3: Close PeopleSoft Project - Upload the Grant/Project Review Fund Source Activities Screenshot and Spreadsheet.](#)

[4: Final Financial Report - Submit & Upload.](#)

Completing 1: Programmatic (Activity) Report - Submit & Upload.


If “1: Programmatic (Activity) Report - Submit & Upload.” was deleted due to there not being a Final Programmatic (Activity) Report, skip to [Completing 2](#), below.

- 1) When the final programmatic report is ready to be submitted, the **Project Team** member assigned “1: Programmatic (Activity) Report - Submit & Upload.” can log into eCivis Grants Network and navigate to the **Project Dashboard** for this specific project to complete the task.
- 2) That Agency eCivis user will click the *Done* box for that task.
 - a. The **Completed By** field is defaulted to that Agency eCivis user so the Agency eCivis user only needs to edit the **Completion Date** if the final programmatic report was submitted before or after the stated date which defaults to the **Due Date**. This field has a *Calendar icon*  next to it so the Agency eCivis user can click on it to select the date.



Task: STEP 4: Submit and Upload the Final Financial Report.


Completed By *: Agency eCivis User



Completion Date *: 08/04/2023 

Attach Files:

Notes:

Save > Cancel >

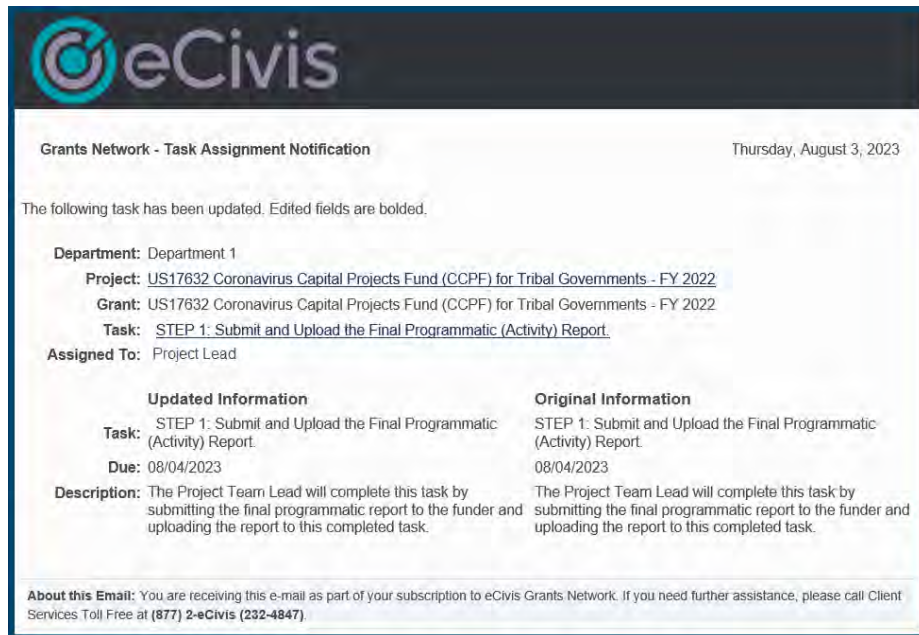
- b. The Agency eCivis user will upload the Final Programmatic (Activity) Report submitted by clicking on the *File icon*  in the **Attach Files** row.

- The **Manage Files** pop-up will appear, and the Agency eCivis user will either drop a file(s) into it or upload a file(s) from their computer by selecting *Browse to select*.
- c. Once the file(s) appears under **Filename**, the Agency eCivis user can click the *Close*  and *Save*  buttons.

3) The Agency eCivis user will return to the **Project Dashboard** with this task removed from the **Pending Tasks** section.


Pending Tasks	Completed Tasks	Approval History					
Task Name 	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
2: Liquidation Requirements Confirm...	ORG0119: FY2025	Grant Closeout	C. Schnick	08/09/2024			<input type="checkbox"/>
3: Close PeopleSoft Project - Uploa...	ORG0119: FY2025	Grant Closeout	C. Schnick	08/09/2024		 	<input type="checkbox"/>
4: Final Financial Report - Submit ...	ORG0119: FY2025	Grant Closeout	C. Schnick	08/09/2024			<input type="checkbox"/>


- a. An email will be sent to the **Project Team** from eCivis Grants Network informing the **Project Team** of “1: Programmatic (Activity) Report - Submit & Upload.” completion. This email should prompt the **Project Team** member assigned “2: Liquidation Requirements Confirmation.” to complete that task.



Completing 2: Liquidation Requirements Confirmation.

As part of completing “**2: Liquidation Requirements Confirmation.**”, the assigned fiscal employee will confirm all financial transactions such as drawdowns, disbursements, and liquidations have been completed including that there are no pending or outstanding submissions and/or payments by Subrecipients and/or contractor invoices.

- 1) If there are any pending or outstanding submissions and/or payments, the assigned fiscal employee should ensure they are for activities and services that occurred during the grant period of performance/performance period.
- 2) Once that has been confirmed, the fiscal **Project Team** member can complete the task on the specific **Project Dashboard** page.
- 3) That Agency eCivis user will click the *Done* box for that task.
 - a. The **Completed By** field is defaulted to that Agency eCivis user so the Agency eCivis user only needs to edit the **Completion Date** if the final financial transaction was before the stated date which defaults to the **Due Date**. This field has a calendar icon next to it so the Agency eCivis user can click on it to select the date.
 - b. The Agency eCivis user will click the *Save button*  to return to the **Project Dashboard** with this task removed from the **Pending Tasks** section.




Pending Tasks	Completed Tasks	Approval History					
Task Name 	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
3: Close PeopleSoft Project - Uploa...	ORG0119: FY2025	Grant Closeout	C. Schnick	08/09/2024		 	<input type="checkbox"/>
4: Final Financial Report - Submit ...	ORG0119: FY2025	Grant Closeout	C. Schnick	08/09/2024			<input type="checkbox"/>

NOTE: No financial transactions should occur after the liquidation end date as that is the final date to expend the funds.

- 4) An email will be sent to the **Project Team** from eCivis Grants Network informing the **Project Team** of “2: Liquidation Requirements Confirmation.” completion. This email should prompt the **Project Team** member assigned “3: Close PeopleSoft Project - Upload the Grant/Project Review Fund Source Activities Screenshot and Spreadsheet.” to complete that task.
- 5) The project is ready for closeout in PeopleSoft.

Completing 3: Close PeopleSoft Project - Upload the Grant/Project Review Fund Source Activities Screenshot and Spreadsheet.

The **Project Team** member assigned “3: Close PeopleSoft Project - Upload the Grant/Project Review Fund Source Activities Screenshot and Spreadsheet.” will need to follow “[The Project Costing Bulletin #1: Closing a Federal Project](#)” document attached to the task to complete it in PeopleSoft.

- 1) Once that has been completed by the appropriate **Project Team** member, that Agency eCivis user can log into eCivis Grants Network and navigate to the project’s specific **Project Dashboard** to complete the task there.
- 2) The Agency eCivis user will click the *Done* box for that task.
 - a. The **Completed By** field is defaulted to that Agency eCivis user so they only need to edit the **Completion Date** of closing out the project in PeopleSoft which defaults to the **Due Date**.
 - This field has a calendar icon next to it so the Agency eCivis user can click on it to select the correct date, if needed.
 - b. Additionally, the Agency eCivis user will need to upload the Grant/Project Review Fund Source Activities Screenshot and Spreadsheet by clicking on the *Files icon*  in the **Attach Files** row.
 - The **Manage Files** pop-up will appear, and the Agency eCivis user will either drop a file(s) into it or upload a file(s) from their computer by selecting *Browse to select*.
 - c. Once the file(s) appears under **Filename**, the Agency eCivis user can click the *Close*  and *Save buttons* .
- 3) The Agency eCivis user will return to the **Project Dashboard** with this task removed from the **Pending Tasks** section.






Task Name 	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
4: Final Financial Report - Submit ...	ORG0119: FY2025	Grant Closeout	C. Schnick	08/09/2024			<input type="checkbox"/>

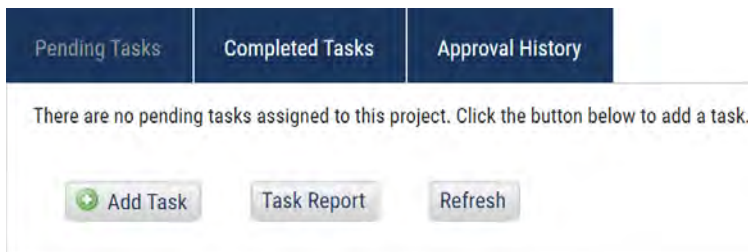
- a. An email will be sent to the **Project Team** from eCivis Grants Network informing the **Project Team** of “3: Close PeopleSoft Project - Upload the Grant/Project Review Fund Source Activities Screenshot and Spreadsheet.” completion. This email should prompt the **Project Team** member assigned “4: Final Financial Report - Submit & Upload.” to complete that task.
- 4) Finally, the Final Financial Report is ready to be submitted.

Completing 4: Final Financial Report - Submit & Upload.

The **Project Team** member assigned “4: Final Financial Report - Submit & Upload.” can log into eCivis Grants Network and navigate to the **Project Dashboard** for the specific project to complete the task.

- 1) That Agency eCivis user will click the *Done* box for that task.
 - a. The **Completed By** field is defaulted to that Agency eCivis user so the Agency eCivis user only needs to edit the **Completion Date** if the Final Financial Report was submitted before or after the stated date which defaults to the **Due Date**.
 - This field has a calendar icon next to it so the Agency eCivis user can click on it to select the date.
 - b. The Agency eCivis user will need to upload the Final Financial Report submitted by clicking  in the **Attach Files** row.
 - The **Manage Files** pop-up will appear, and the Agency eCivis user will either drop a file(s) into it or upload a file(s) from their computer by selecting *Browse to select*.
 - c. Once the file(s) appears under **Filename**, the Agency eCivis user can click the *Close*  and *Save buttons* .
- 2) The Agency eCivis user will return to the **Project Dashboard** with this task removed from the **Pending Tasks** section.
 - a. An email will be sent to the **Project Team** from eCivis Grants Network informing the **Project Team** of “4: Final Financial Report - Submit & Upload.” completion.

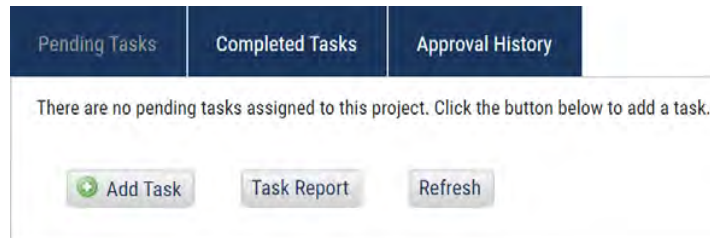
NOTE: At this point, there should be no tasks listed for this project and grant.



Section 5c – Final Closeout Steps

Now that all remaining tasks have been completed, the grant is ready to be closed.

- 1) Upon receiving the Closeout Task “4” completion email, the **Project Lead** will log into eCivis Grants Network and navigate to the **Project Dashboard** for that project.
 - a. Again, there should be no tasks under the **Pending Tasks** section.
If there is a task, it needs to be resolved prior to this last step.



- 2) Under **Available Actions**, the **Project Lead** will click *I am ready to close this grant*.
 - a. This will close out the grant and only eCivis can reopen it to the Indiana State Agency, if needed.
 - b. The **Project Lead** must enter the **Closed Date** which is the date the **Project Lead** is performing this current action.
 - c. The **Closed By** field defaults to the **Project Lead**.
 - d. The **Closure Type** field will appear from the dropdown menu with the following choices (*Contract complete* is the most frequently used choice as it indicates that the grant project and funding are completed):
 - *Opted not to pursue* - The Indiana State Agency was awarded and accepted but has decided to discontinue supporting the project and grant.
 - *Grant not awarded* - A project was awarded but unfunded (i.e., the Grantor/Funder is waiting for its appropriation to award the money) so the money never is appropriated, so the Indiana State Agency closes the project and grant.
 - *Contract complete* - Correlates to the Regular or Normal condition for closeout which was the term of the grant or other resource has ended, the objectives of the grant or other resource have been met, or the funds have been fully expended. This is the most common condition for closing out a grant or other Federal or state resource.
 - *Awarded but not accepting* - The Indiana State Agency was awarded funding but has decided not to accept the award.
 - *Other* - Use this selection if the Closure Type does not fit one of the others.


- 3) The **Project Lead** will enter in the required **Notes** of the submission date of the Final Financial Report.
 - a. If no Final Financial Report was submitted, the **Project Lead** will need to enter *No Final Financial Report submitted* in the **Notes**.


Grant Status - Close Grant


US17632 Coronavirus Capital Projects Fund (CCPF) for Tribal Governments - FY 2022

Complete Status Form

Grant: US17632 Coronavirus Capital Projects Fund (CCPF) for Tribal Governments - FY 2022

Closed Date *: 

Closed By *: 


Closure Type *: 


Notes *:

Financial Report Submitted on 7/1/2023.

461 Characters Left

Upload Files

Attach Files: 

- 4) Once the **Project Lead** has entered the required **Notes**, the **Project Lead** will click the *Save button* .
- 5) The **Project Lead** is directed to the **Project History** tab of the eCivis project and grant. Under the **Grants Awarded** section, it will list the grant as “Closed.”

The grant is now officially closed in eCivis Grants Network.
The interface with PeopleSoft will discontinue.

Grants Awarded					
Status	Award	Awarded	Match	Type	Notes
	07/27/2023	\$80,000,000.00	N/A	None	

- 6) The **Project Lead** can click the *Project Dashboard* link above **Project History** and will return to the **Project Dashboard** for the eCivis project and grant.
 - a. However, now there is not an active grant assigned to the project.

b. All tabs are still accessible, including the **Documents** tab and its contents.

Home / Org Project Dashboard / Dept Project Dashboard / Project Dashboard

Project Dashboard: US17632 Coronavirus Capital Projects Fund (CCPF) for Tribal Governments - FY 2022

Department: Department 1

Data Integration Options Project Options

Overview Documents Grant Lifecycle Goals & Metrics Budgets Contracts & Accounts Spending History

Active Grants
All grants associated with this project have been moved to the Project History page. In order to reopen a closed grant, please contact your Client Services Associate at: (877) 232-4847 ext. 2.

Project Team
J. Mistlebauer (Lead) Director
A. Eulano Grant Managem...

Pending Tasks Completed Tasks Approval History

There are no pending tasks assigned to this project. Click the button below to add a task.

Add Task Task Report Refresh

Conclusion

A reminder that this guide outlined step-by-step closeout of an eCivis Project.

Visit [Project Costing Bulletin #1: Closing a Federal Project](#) to complete closeout in Peoplesoft Financials.

Note that Department Master Account Holders (DMAHs) can run a Tasks Report to see all completed tasks with dates for Closeouts. See [Appendix B – Tasks Report: Completed Date](#) for directions on how to run that report.

Definitions

Agency eCivis User – A user of eCivis Grants Network. This is a State of Indiana staff person using the system as a Grantee or Grantor. See Grantee and Grantor.

Agreement – May also be referred to as grant agreement. It is a legal instrument executed to provide financial assistance to a Grantee/Subrecipient. See Notice of Award (NOA).

Department – Departments built within eCivis Grants Network. A single Indiana State Agency may have one or more departments within eCivis Grants Network representing their divisions, offices, agencies, etc.

Department Master Account Holder (DMAH) – An Agency eCivis user that can see across their entire eCivis Grants Network listing or department, typically an Indiana State Agency Lead. Please see the [State of Indiana Policy - User Management](#) for more information.

eCivis – The software vendor that created eCivis Grants Network (Indiana State Agencies as Grantees/Grantors) and eCivis Portal (Applicants/Subrecipients to Indiana State Agencies' grant programs).

eCivis Grants Network – The grant management system created by eCivis for state Grantees/Grantors.

eCivis Project – Project is used in two ways within eCivis Grants Network, Grantee project and Grantor project. See Grantee Project and Grantor Project.

Financial Report (Payment or Reimbursement Request) – The task assigned to a Grantee or Subrecipient to submit financial data. Financial reports can also include payment or reimbursement requests within them. These reports are usually recurring in nature through the grant term.

Funder – See Grantor.

Goals – The outcomes to be achieved as a byproduct of the projects or programs administered by an Indiana State Agency. Goals can be captured and tracked in eCivis Grants Network, depending on the requirements of each grant program.

Grant Agreement – See Agreement.

Grant Amendment – An amendment (either initiated by the Grantor or Grantee/Subrecipient) that will officially change the terms of the agreement. An amendment can edit the scope of work, grant term, or financial information.

Grant Program – See Program.

Grant Term – See Period of Performance.

Grantee – Persons or organizations who receive funding from another party. Indiana State Agencies operate in the role of a Grantee when they receive funding from external parties like the Federal government. A Grantee is also referred to as a Subrecipient.

Grantee Project – Indiana State Agencies can manage grants that they pursue from pre-award to post-award by creating a project.

Grantor – Persons or organizations that provide grant funding to another party. Indiana State Agencies operate as Grantors when they distribute grant funds to Subrecipients (Grantees). Also, referred to as a Funder.

Grantor Project – A project title is required for each application submitted by an Applicant and an award granted by an Indiana State Agency. The Subrecipient or the Grantor (Indiana State Agency) can edit the project title at any time. The project title is called Project or Project Name in eCivis Grants Network.

Grants Network (GN) – The eCivis name for the software. eCivis also refers to the system as “eCivis,” “eCivis Grants Network,” or “GN.”

Indiana State Agency Lead – A State of Indiana employee in a leadership role within eCivis Grants Network. See Department Master Account Holder (DMAH).

Notice of Award (NOA) – A legal document notifying the Recipient that an award has been made and funds may be requested from the awarding agency.

Organization Funding – Funding opportunities that do not appear in the eCivis Grants Network Search for Grants feature will need to be entered manually as Organization Funding.

Pass-Through Entity – The non-Federal entity that provides a subaward to a Subrecipient to conduct part of a Federal program.

Pass-Through Funding – Refers to funding given to a non-Federal entity that provides a subaward to a Subrecipient to conduct part of a Federal program.

Payment Request – See Reimbursement Request and Financial Report.

PeopleSoft Project – An accumulation of costs for a definite period of time.

Period of Performance (Performance Period) – Time interval between the start of an award and the end date. Referred to also as the Grant Term and Project Period.

Post-Award – Post-award can be utilized in two aspects of the grant lifecycle, Post-Award Grantee and Post-Award Grantor. See their definitions for more specifics.

Post-Award Grantee – A stage in the lifecycle of a grant after the Indiana State Agency has accepted the award. Components of the post-award process include financial reporting, activity reporting, Subrecipient management, and closeout. See Pre-Award and Pre-Award Grantee definitions too.

Post-Award Grantor – A stage in the lifecycle of a grant after the award has been made to a Subrecipient. Components of the post-award process include status reporting, financial reporting/payment request, payment processing, and closeout. See Pre-Award and Pre-Award Grantor definitions too.

Pre-Award – Pre-award can be utilized in two aspects of the grant lifecycle, Pre-Award Grantee and Pre-Award Grantor. See their definitions for more specifics.

Pre-Award Grantee – A stage in the lifecycle of a grant that precedes the awarding of the grant. Components of the pre-award process include application, application review and evaluation, and application submission to the Grantor (Federal, foundation, etc.).

Pre-Award Grantor – A stage in the lifecycle of a grant that precedes the awarding of a grant. Components of the pre-award process include solicitation setup, application creation, application launch, submitted application review and evaluation, award approval, and award finalization. See Post-Award and Post-Award Grantor.

Program – The release of funds to Subrecipients. Programs are also referred to as “grant programs.” For example, The Office of Community and Rural Affairs releases a grant program to accept applications for the Community Development Block Grant (CDBG) application.

Program Manager – An Agency eCivis user that is the first Agency eCivis user to set up a Grantee project or solicitation (Grantor).

Project – See Grantee Project.

Project Lead – The grant program manager or other departmental authority for a specific Grantee project in eCivis Grants Network. Also, Project Lead is referred to sometimes as simply the Lead.

Project Period – See Period of Performance.

Recipient – As part of the Grantor award recommendation process performed by an Agency eCivis user in eCivis Grants Network, the Recipient is the Applicant (person or organization) receiving the award directly from the Indiana State Agency. While the Federal definition of ‘Recipient’ does not include Subrecipients—as its definition is strictly being the direct recipient of the Federal funding from the Federal Grantor (i.e., not being a Subrecipient from an entity that received the Federal funding)—within eCivis Grants Network, the Recipient and Subrecipient have been used synonymously. Also, referred to as the Prime Recipient.

Reimbursement Request – The process a Subrecipient undertakes in eCivis to be reimbursed for allowable program activity. This is completed through the financial reporting feature in eCivis Grants Network, indicating that it is a reimbursement request.

Subrecipient – An entity that receives a grant from an Indiana State Agency utilizing eCivis Grants Network. Also, it can be referred to as a Grantee of the Indiana State Agency.

Task – A system-generated “to do” that must be completed. Tasks can be manually created, or system-generated as part of a workflow. See Workflow.

Workflow – A series of review and approval activities or tasks that must be completed to accomplish specific parts of the grant process, e.g., State Budget Agency (SBA) pursuance approval or financial reports with/without payment/reimbursement requests from Subrecipients.

Appendix A – Tasks Report: Contract Close

An Agency eCivis user with access to the **Reports** tab can use **Tasks Report** to run a report to track the Contract Close dates for eCivis projects and grants.

- 1) The Agency eCivis user will log into eCivis Grants Network.
- 2) Click the *Reports* tab then *Tasks Report* under it.



- 3) The default for the report's *Start Date* and *End Date* is a year from the current date at the time of the report.
 - a. It is recommended that an Agency eCivis user change the *Start Date* to July 1, 2023 and the *End Date* to a month later than the current date when they are running the report e.g., if the Agency eCivis user is in the system and running the report on July 31, 2023 that will be the default *End Date* and they should change that date to August 31, 2023, to capture any pending or upcoming **Contract Close** dates.
 - If the Agency eCivis user would like to view even further out future months, they would enter the desired date for the *End Date*. Use the calendar icon to adjust the dates.
- 4) Next, in the **Filter By Date Type**, the Agency eCivis user will select **Due Date** from the dropdown menu. The other choices are:
 - a. **Assigned Date** – the date the task was assigned to a **Project Team** member.
 - b. **Completed Date** – the date a **Project Team** member completed the task.
- 5) For the next three fields (**Department**, **Project Lead**, and **Project**), it is defaulted to *All Departments*, *All Project Leads*, and *All Projects*. It is recommended that an Agency eCivis user does not change them.
 - a. An Agency eCivis user will only have access to the **Department(s)** that they are assigned to so will only have reporting access on that **Department(s)**.
- 6) The next field is **Task Type**. There are seven choices in the dropdown menu with the Agency eCivis user clicking on *Contract Close* for this report. All seven choices are:
 - a. **All Tasks** – all tasks in eCivis Grants Network regardless of being automatically created by the system or manually created by an Agency eCivis user.

- b. **Application Due** – this task appears at Application Preparation Stage.
- c. **Scheduled Report** – assigned **Task Type** when task was created.
- d. **Approval** – a task that has an approval process associated with it.
- e. **Miscellaneous** – assigned **Task Type** when task was created.
- f. **Contract Close** – this task appears at **Grant Awarded**.
- g. **Override** – associated with required tasks only.

7) Additionally, **Task Type** has two boxes that can be checked. *Pending* is checked as the default and *Completed* is an option for checking as well.

- a. For this report, the Agency eCivis user is tracking the Contract Close dates that have not been completed so it is not checked.
 - However, if the Agency eCivis user wanted to see both completed and uncompleted Contract Close dates, the Agency eCivis user should click on both boxes.

Generate Report ➤

8) The Agency eCivis user clicks the *Generate Report button* **Generate Report** ➤ and an Excel spreadsheet report will be available to view and save.

Generate Report ➤

9) On the Excel spreadsheet report, Column P, *Item Due*, will indicate when the Contract Close is due. If past due, it will be in **red** text.

10) If the Agency eCivis user clicked both the Pending and Completed boxes, Column Q, *Completion Date*, will be populated with the date the Contract Close was completed. It will be in red text if completed after its due date.

	A	B	C	D	E	G	I	K	M	N	O	P	Q
1	Project	Project Status	Department	Task	Task Type	Stage	Designated for Approval	Assigned Date	Completed By	Grant	Item Due	Completion Date	
	SP New Project Test 18	Open	Department 6	Task 1	miscellaneous	Order - Consideration		07/24/2023		US10584 National Science Foundation (NSF) Campus Cyberinfrastructure (CCI) - FY 2023	07/26/2023		
163	FY 2023 PREA	Open	Bravo	Approval Req'd	Approval	Application Preparation	SBA Grants	07/13/2023		US17474 Bureau of Justice Assistance (BJA) Invited to Apply: Prison Rape Elimination Act (PREA) Reallocation Funds (Limited Eligibility) - FY 2023	07/26/2023		
164	SP New Project Test 18	Open	Department 8	Approval Req'd	Approval	Application Submitted	SBA Budget and Grants	07/25/2023		US15482 National Science Foundation (NSF) Campus Cyberinfrastructure (CCI) - FY 2023	07/26/2023		
165	FY 2023 PREA	Open	Bravo	Approval Req'd	Approval	Application Preparation	SBA Analyst - FSSA	07/10/2023		US17474 Bureau of Justice Assistance (BJA) Invited to Apply: Prison Rape Elimination Act (PREA) Reallocation Funds (Limited Eligibility) - FY 2023	07/26/2023		
166	Family Unification Program (FUP) - FY 2022	Open	Department 1	Rqst Approval	Approval	Grant Awarded	SBA Budget and Grants	07/25/2023		US7893 Family Unification Program (FUP) - FY 2022	07/26/2023		
167	Family Unification Program (FUP) - FY 2022	Open	Department 1	Rqst Approval	Approval	Grant Awarded	SBA Finance	07/25/2023		US7893 Family Unification Program (FUP) - FY 2022	07/26/2023		
168				Rqst Approval	Approval								

An Agency eCivis user can use this report to make sure projects are being moved to **Grant Closeout** in a timely manner as they should be the day after the stated **Contract Close** date.

Appendix B – Tasks Report: Completed Date

An Agency eCivis user with access to the **Reports** tab can use **Tasks Report** to run a report to track the completed Contract Close dates for projects and grants.

- 1) The Agency eCivis user will log into eCivis Grants Network.
- 2) Click the **Reports** tab then *Tasks Report* under it.



- 3) The default for the report's **Start Date** and **End Date** is a year from the current date at the time of the report which shows as the **End Date**. Use the calendar icon to adjust the dates.
 - a. If the Agency eCivis user wants to view both Pending and Completed tasks for this report, they will need to change the End Date to a future date.
- 4) Next, in the **Filter By Date Type**, the Agency eCivis user will select **Completed Date** from the dropdown menu. The other choices are:
 - a. **Assigned Date** – the date the task was assigned to a **Project Team** member.
 - b. **Due Date** – the date a task is due.
- 5) For the next three fields (**Department**, **Project Lead**, and **Project**), it is defaulted to *All Departments*, *All Project Leads*, and *All Projects*. It is recommended that an Agency eCivis user does not change them.
 - a. An Agency eCivis user will only have access to the **Department(s)** that they are assigned to so will only have reporting access on that **Department(s)**.
- 6) The next field is **Task Type**. The following choices are accessed by selecting *Miscellaneous*:
 - a. **All Tasks** – all tasks in eCivis Grants Network regardless of being automatically created by the system or manually created by an Agency eCivis user.
 - b. **Application Due** – this task appears at Application Preparation Stage.
 - c. **Scheduled Report** – assigned **Task Type** when task was created.
 - d. **Approval** – a task that has an approval process associated with it.

- e. **Miscellaneous** – assigned **Task Type** when task was created.
- f. **Contract Close** – this task appears at **Grant Awarded**.
- g. **Override** – associated with required tasks only.

7) Additionally, **Task Type** has two boxes that should be checked for this report, *Pending* and *Completed*. The *Pending* box is defaulted with a check so the Agency eCivis user will need to check the *Completed* box.

Enter Criteria and Generate Report

Start Date: 07/01/2023 End Date: 12/31/2023 Filter By Date Type: Completed Date

Department: All Departments
Alpha
Bravo
Charlie
Delta

Project Lead: All Project Leads
Agency eCivis User Project: All Projects
23(g) State Plan Grants - FFY 2024
988 Improvement
After-School Programs
Agency for Healthcare Research and Quality

Task Type: Miscellaneous Pending Completed

Generate Report >

8) The Agency eCivis user clicks  and an Excel spreadsheet report will be available to view and save.

Enter Criteria and Generate Report

Start Date: 07/01/2023 End Date: 12/31/2023 Filter By Date Type: Completed Date

Department: All Departments
Alpha
Bravo
Charlie
Delta

Project Lead: All Project Leads
Agency eCivis User Project: All Projects
23(g) State Plan Grants - FFY 2024
988 Improvement
After-School Programs
Agency for Healthcare Research and Quality

Task Type: Miscellaneous Pending Completed

Generate Report >

- 9) As this report was for all Miscellaneous tasks, the Agency eCivis user will want to filter by **Stage** and select *Grant Closeout*.
- a. **Item Due** will indicate the date the task was due while **Completion Date** will be populated with the date the task was completed. If any date is in **red** text, it is either past due or was completed after its due date.

Project	Stage	Grant	Item Due	Completion Date	Task Status
	Grant Closeout	FD1004 Hearst Foundations: Health - FY 2023	07/01/2023	07/01/2023	Completed
	Grant Closeout	FD1004 Hearst Foundations: Health - FY 2023	07/01/2023	07/01/2023	Completed
National Police Dog Foundation (NPDF) - FY 2023	Grant Closeout	FD12693 National Police Dog Foundation (NPDF) - FY 2023	07/01/2023	07/01/2023	Completed
National Police Dog Foundation (NPDF) - FY 2023	Grant Closeout	FD12693 National Police Dog Foundation (NPDF) - FY 2023	07/01/2023	07/01/2023	Completed

An Agency eCivis user can use this report to ensure Closeout tasks are being completed in a timely manner.

Appendix C – Grant Closeout Checklist

Prior to initiating Grant Closeout ([Section 4 – Closeout Conditions](#)):

- Deliverables specified by the governing agreement have been accomplished.
 - Including the submission of a final programmatic report, if required.
- The program’s objectives have, to the extent practicable, been achieved.
- Any outstanding findings from program audits have been rectified.

- Final Report: For grants and other resources where the Federal government is the awarding entity, the final Federal Financial Report (FFR) has been filed.
 - An equivalent final report, if required, has been filed for grants and other resources where the Federal government is not the awarding entity.
- All financial transactions such as drawdowns, disbursements, and liquidations have been completed.
- Any expenditure-matching requirements have been met.

Initiating Closeout Process within eCivis Grants Network ([Section 5 – Closeout Process](#)):

- The term has ended: at Contract Close Date plus 1 day.
- Contract Close task: marked “Done” & “Saved”.
 - eCivis Project has updated to the “Grant Closeout” Stage.

Automatic Tasks at Grant Closeout ([Section 5a](#)):

- Reassign automatic tasks to other Project Team Members, if applicable.
- Update due dates for each of the four closeout tasks, as needed.

Completing Closeout Tasks ([Section 5b](#)):

- 1: Programmatic (Activity) Report - Submit & Upload.
 - Attached Final Programmatic (Activity) Report?
- 2: Liquidation Requirements Confirmation.
 - The assigned fiscal employee confirmed all financial transactions have been completed? (Including drawdowns, disbursements, and liquidations, and no pending or outstanding submissions and/or payments by Subrecipients and/or contractor invoices exist.)
- 3: Close PeopleSoft Project - Upload the Grant/Project Review Fund Source Activities Screenshot and Spreadsheet.
 - Completed all steps of [Project Costing Bulletin #1 - Closing A Federal Project?](#)
 - Attached Grant/Project Review Fund Source Activities Screenshot and Spreadsheet?
- 4: Final Financial Report - Submit & Upload.
 - Attached Final Financial Report?

Final Closeout Steps ([Section 5c](#)):

- No Pending Tasks should remain. If there is a task, it needs to be resolved, now.
- Available Actions -> “I am ready to close this grant.”
- Project History tab shows the eCivis Project/ grant is in “Closed” Status.