



# District or Foundation Administrator Guide

Use this guide if you set up Grant Cycles, manage people and requirements, support active projects, or close grants.

## BEFORE YOU BEGIN

Have the approved dates, policies, application questions, document list, scoring guide, qualification rules, and support contacts ready.

## HOW TO USE THIS GUIDE

Complete the tasks in order. Each task tells you where to begin, what to select, how to know you are finished, and what happens next.

## Understand the two timelines

A Grant Cycle can close while its awarded projects and reports continue.

|                    |                                                                                                               |
|--------------------|---------------------------------------------------------------------------------------------------------------|
| Grant Cycle        | One application opportunity, including its application dates, review, and award decisions.                    |
| Project Period     | The dates when an awarded project is expected to begin and end. It may continue after the Grant Cycle closes. |
| Reporting Schedule | The progress and final reports required for an awarded project, with their due dates.                         |
| Project closeout   | The final checks that formally complete an awarded project after its required reports are accepted.           |

## Tasks at a glance

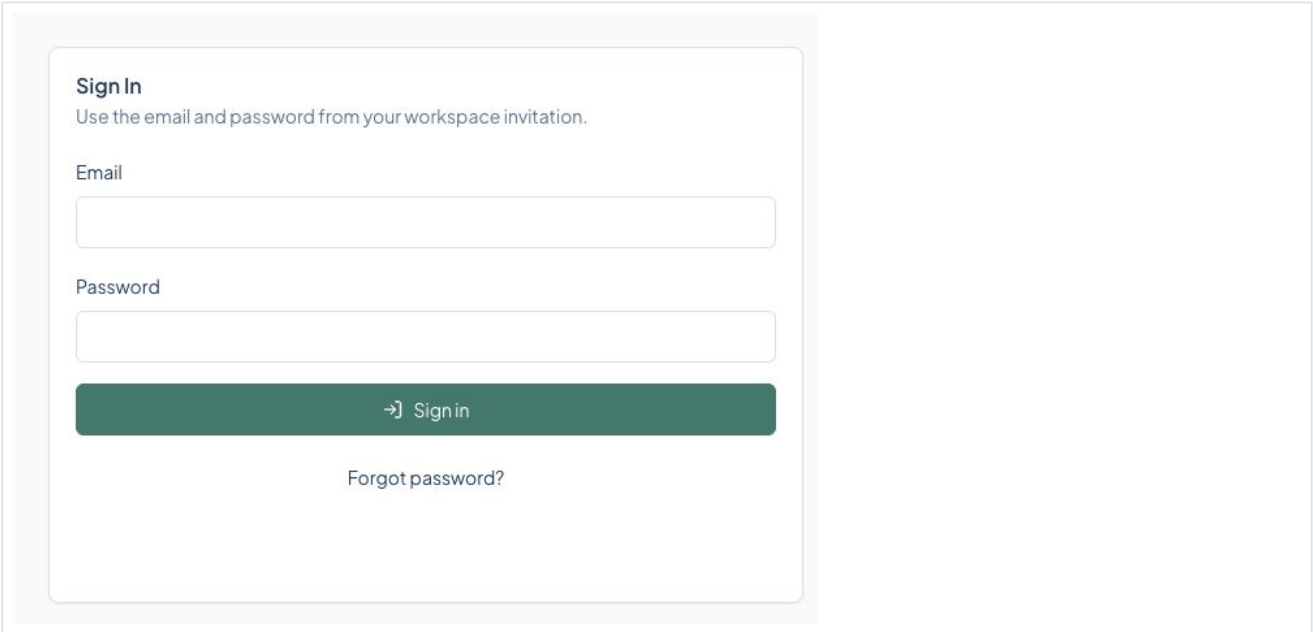
- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                          |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ol style="list-style-type: none"><li>1. Sign in</li><li>2. Use the administration dashboard</li><li>3. Set the district or foundation profile</li><li>4. Invite people and assign access</li><li>5. Maintain the club or organization directory</li><li>6. Create and manage Grant Cycles</li><li>7. Build the application form</li><li>8. Define required documents</li><li>9. Configure scoring guides</li><li>10. Configure annual qualification</li></ol> | <ol style="list-style-type: none"><li>11. Publish confirmations and signatures</li><li>12. Apply policy rules</li><li>13. Prepare reporting and closeout</li><li>14. Manage award acceptance and grant payments</li><li>15. Review financial controls</li><li>16. Manage compliance</li><li>17. Issue and review audit requests</li><li>18. Monitor communications</li><li>19. Close the grant</li></ol> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Screenshots use fictional training records. Names, dates, amounts, and district numbers will differ.

# Sign in

**WHERE TO BEGIN** Start on the GrantsPost sign-in page.

- 1 Enter the email address from your invitation.
- 2 Enter your password.
- 3 Select Sign in. If you cannot remember your password, select Forgot password?



Example screen. Training names, dates, amounts, and district numbers will differ.

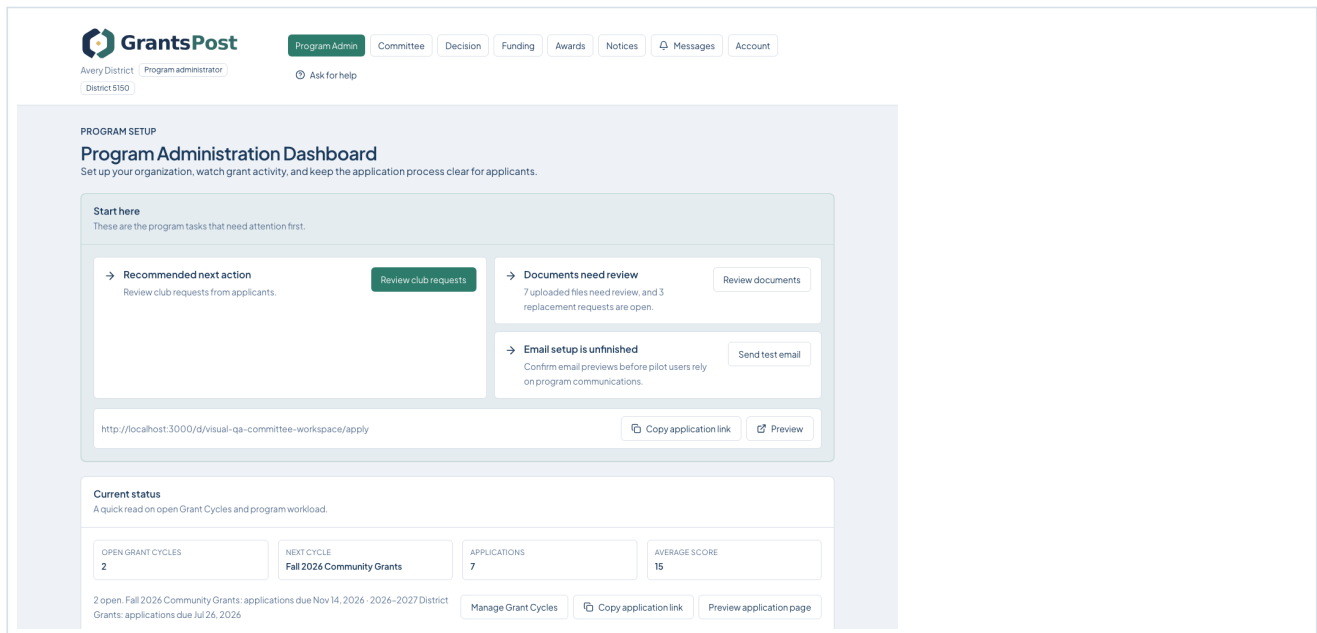
|                                                                                         |                                                                                                                                  |
|-----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| <b>YOU ARE FINISHED WHEN</b><br><br>You arrive at the home page for your assigned role. | <b>WHAT HAPPENS NEXT</b><br><br>GrantsPost opens the home page for your assigned role.                                           |
| <b>IF SOMETHING IS NOT WORKING</b>                                                      | Check that you used the email address from the invitation. Use Forgot password? before asking an administrator to resend access. |

# Use the administration dashboard

## WHERE TO BEGIN

From the top menu, open District Admin.

- 1 Read the Recommended action card first.
- 2 Select the recommended action, such as Create Grant Cycle, Review and open, or Manage Grant Cycle.
- 3 Return to this dashboard after each setup task to see what still needs attention.



Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

The dashboard shows no unexpected setup warning.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Set the district or foundation profile

## WHERE TO BEGIN

From District Admin, open District profile.

- 1 Open the section you need: district identity, terminology, contact details, or branding.
- 2 Enter the public information applicants should see.
- 3 Select Save district profile or Save branding, depending on the section.

**GrantsPost**  
Avery District Program administrator  
District 5150

Program Admin Committee Decision Funding Awards Notices Messages Account

Ask for help

← Back to Program setup

**PROGRAM SETUP**  
**Organization profile**  
Tell people which organization they are working with and where to get help.

**Workspace settings**  
Manage organization identity, contact routing, reminders, and applicant intake rules.

**Organization identity**  
These fields identify the organization and control the public web address used in GrantsPost links.

**Workspace terminology profile**  
Choose a starter vocabulary. Individual labels below can still be customized.  
General grantmaker

**Organization name**  
Use the public name applicants recognize.  
District 5150

**Organization identifier**  
Optional internal number or code.

**Organization web address**  
Used for links back to your public site.

**Workspace code**  
Used in web links. Change this only before people start using the site.  
visual-qa-committee-workspace

**Branding**  
What this affects: the name and colors people see while using the grant site.

**Visual Identity**  
Control the organization name and logo shown in the application shell.

**Public display name**  
Shown in the top left of the app.  
District 5150

**Logo URL**  
Optional. Leave blank to use the display name.

**Primary color**  
Used for important buttons.

**Accent color**

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

Applicants see the correct organization name and know where to get help.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

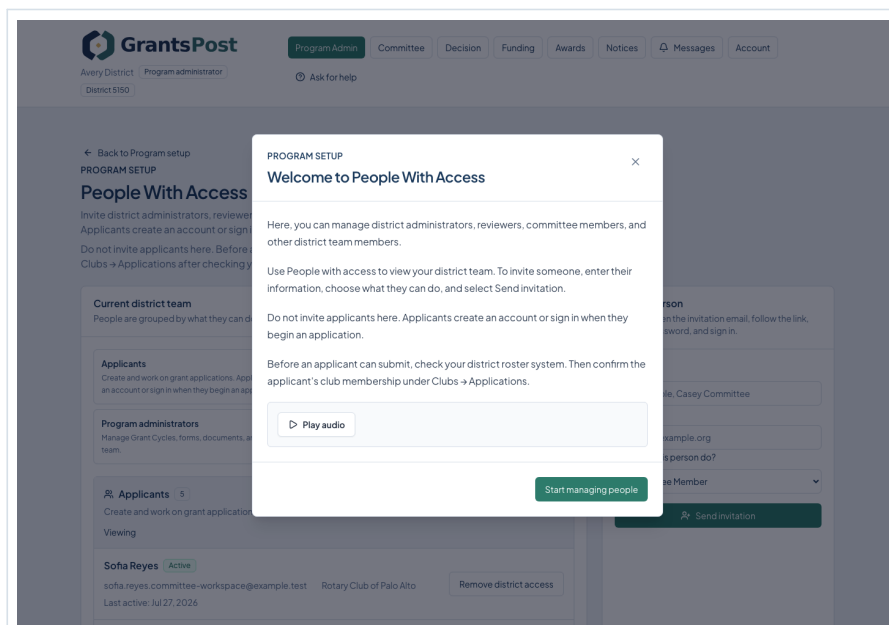
Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Invite people and assign access

## WHERE TO BEGIN

From District Admin, open People With Access.

- 1 In Invite a Person, enter the person's name and email address.
- 2 Choose only the access they need.
- 3 Select Send invitation. If the person already appears, resend the invitation instead of adding a duplicate.



Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

Every pilot participant appears with the correct role and status.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

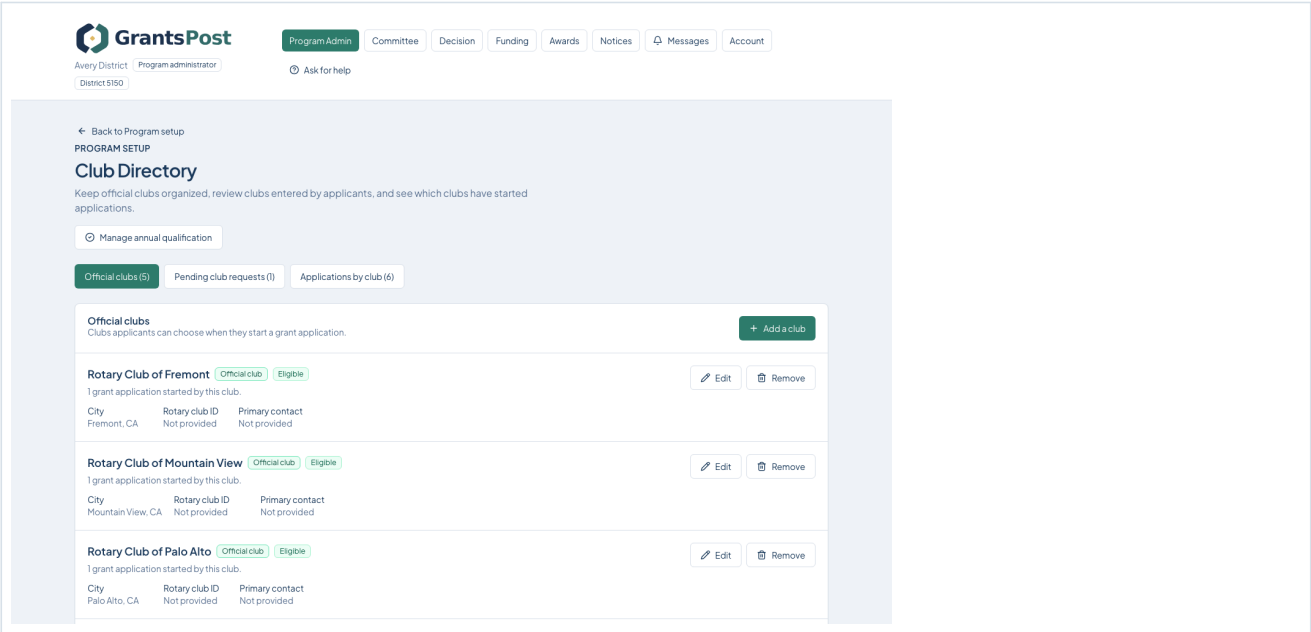
## IF SOMETHING IS NOT WORKING

If the person already appears, do not create a second record. Open the existing record and resend the invitation.

# Maintain the club or organization directory

**WHERE TO BEGIN** From District Admin, open Club Directory.

- 1 Look for the club before adding a new one.
- 2 If it is missing, select Add a club, enter the club details, then select Create club.
- 3 For an existing club, select Edit, make the change, then select Save club changes.



Example screen. Training names, dates, amounts, and district numbers will differ.

**YOU ARE FINISHED WHEN**

Eligible applicants can find or request their organization.

**WHAT HAPPENS NEXT**

Return to your role's home page and follow the next action shown by GrantsPost.

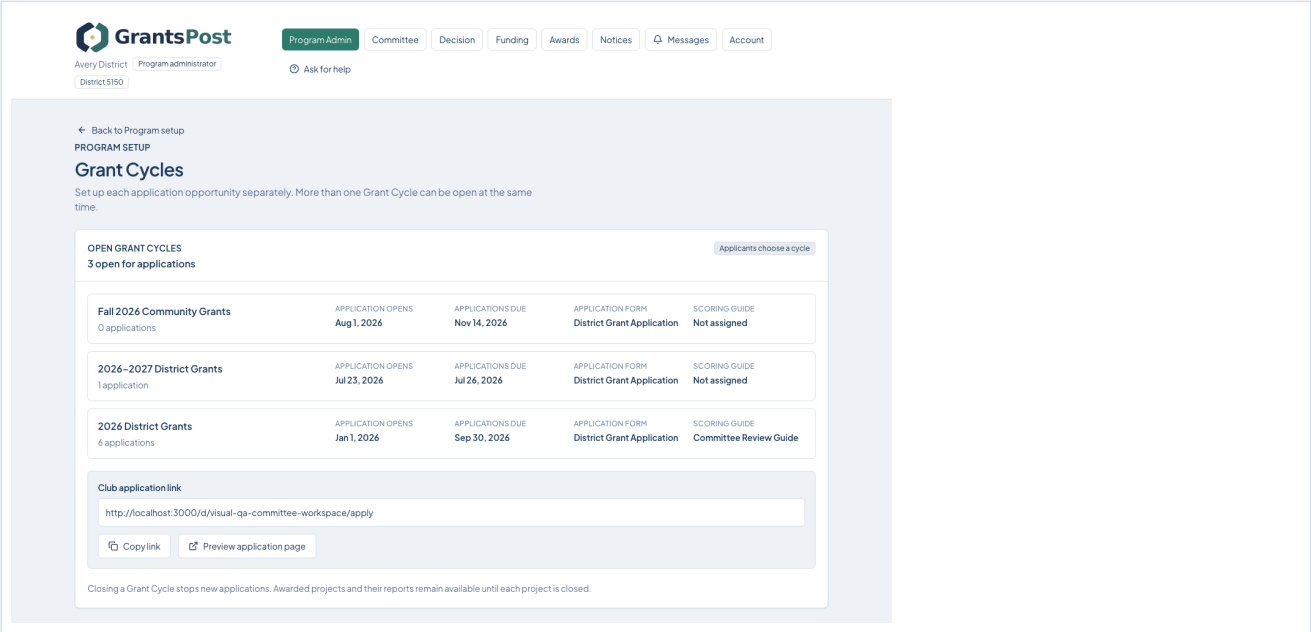
**IF SOMETHING IS NOT WORKING**

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Create and manage Grant Cycles

**WHERE TO BEGIN** From District Admin, open Grant Cycles.

- 1 Select Create Grant Cycle. Give it a clear name, such as Spring 2027 Community Grants, and enter its application dates, form, documents, and scoring guide.
- 2 Select Create Grant Cycle. Keep the new Grant Cycle in Draft while you finish setup.
- 3 When every setup item is correct, use Open applications. Other Grant Cycles may stay open at the same time.



Example screen. Training names, dates, amounts, and district numbers will differ.

**YOU ARE FINISHED WHEN**

The intended Grant Cycle is open and the public dates are correct.

**WHAT HAPPENS NEXT**

Applicants see all open Grant Cycles and choose the correct one before starting.

**IF SOMETHING IS NOT WORKING**

If Open applications is unavailable, return to the dashboard and complete the setup item named in the warning.

# Build the application form

## WHERE TO BEGIN

From District Admin, open Application Forms.

- 1 Open the form for the Grant Cycle, or select Create new Application Form.
- 2 Use Save section, Add question, and Save question to build the form in the order applicants will use it.
- 3 Select Preview as applicant and read the whole form before opening applications.

The screenshot shows the GrantsPost interface for managing application forms. The top navigation bar includes links for Program Admin, Committee, Decision, Funding, Awards, Notices, Messages, and Account. The main content area is titled 'Application Forms' and features a '+ Create new Application Form' button. Below this, there are four application form cards:

- Another Test**: 2 sections, 5 questions, not used by grant cycles, no applications. Status: Active.
- Copy of District Grant Application**: 4 sections, 14 questions, not used by grant cycles, no applications. Status: Not available for future Grant Cycles.
- District Grant Application**: 4 sections, 14 questions, used by grant cycles, has applications. Status: Active.
- The New GRANT FORM**: 5 sections, 17 questions, not used by grant cycles, no applications. Status: Active.

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

A preview reads naturally from the first question through submission.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Define required documents

## WHERE TO BEGIN

From District Admin, open Required Documents.

- 1 Select Add document requirement.
- 2 Enter a clear applicant-facing name, accepted file types, and the condition that makes the document required.
- 3 Select Add document requirement, then confirm it appears in the correct Grant Cycle.

**GrantsPost**  
Avery District Program administrator  
District 5150

Program Admin Committee Decision Funding Awards Notices Messages Account

Ask for help

← Back to Program setup

### Required Documents

Choose the files clubs must upload with their grant application.

**Document setup overview**  
A quick check of what clubs will be asked to upload.

| REQUIRED DOCUMENTS | OPTIONAL DOCUMENTS | CURRENT GRANT CYCLE                   | UPLOADS NEEDING ATTENTION |
|--------------------|--------------------|---------------------------------------|---------------------------|
| 14                 | 0                  | No document requirements assigned yet | 10 need review            |

**Document requirements**  
These are the upload requests clubs see while completing an application.

[Add document requirement](#)

**Document order**  
Drag document requirements into the order applicants should see them. Use Edit only when you need to change the document details.

[Save document order](#)

| Document order | Document details                                                                                         | Actions                                                                                           |
|----------------|----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|
| 1              | Detailed budget<br>Upload the detailed budget.<br>REQUIRED- SHOWN- 2026 DISTRICT GRANTS                  | <a href="#">View details</a> <a href="#">Edit requirement</a> <a href="#">↑</a> <a href="#">↓</a> |
| 2              | Detailed budget<br>Upload the detailed budget.<br>REQUIRED- SHOWN- COPY OF DISTRICT GRANT APPLICATION V1 | <a href="#">View details</a> <a href="#">Edit requirement</a> <a href="#">↑</a> <a href="#">↓</a> |

Sunnyvale Community Foundation Survey 2025

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

The application preview requests the right documents for a sample project.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

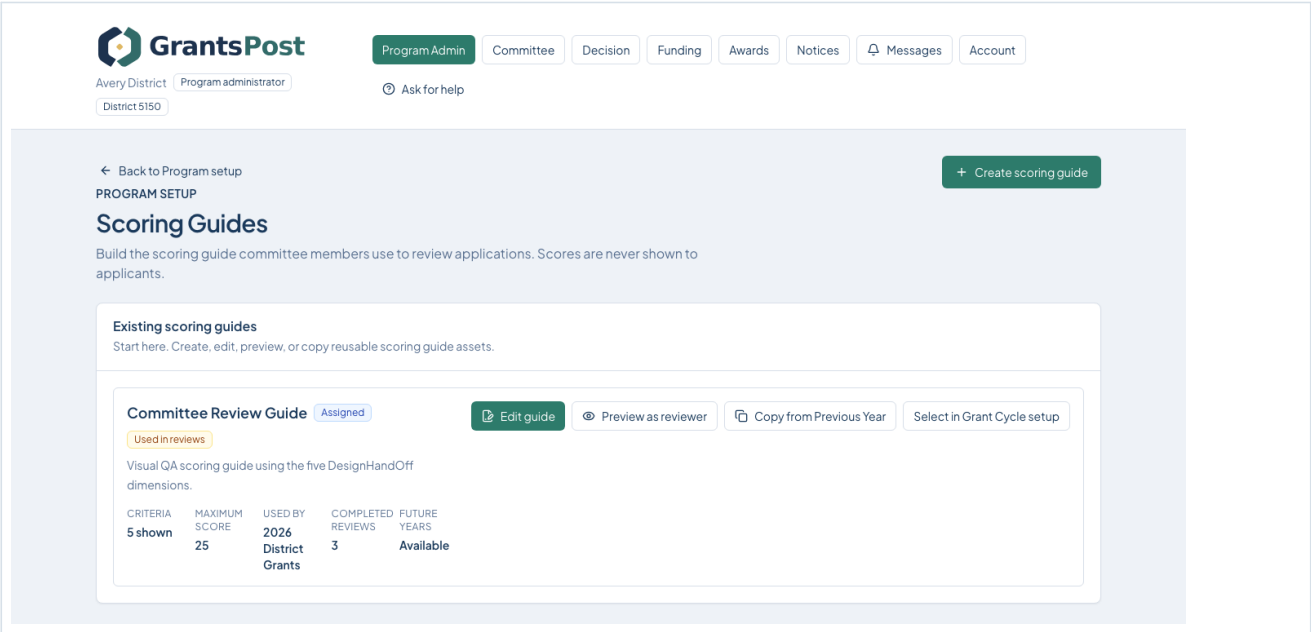
## IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Configure scoring guides

**WHERE TO BEGIN** From District Admin, open Scoring Guides.

- 1 Select Create scoring guide or Edit guide.
- 2 For each criterion, enter the name, score range, weight, and reviewer instructions; then select Save criterion.
- 3 Select Save guide, preview it, and assign the published guide to the correct Grant Cycle.



Example screen. Training names, dates, amounts, and district numbers will differ.

**YOU ARE FINISHED WHEN**

A reviewer can score every criterion without guessing what it means.

**WHAT HAPPENS NEXT**

Return to your role's home page and follow the next action shown by GrantsPost.

**IF SOMETHING IS NOT WORKING**

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Configure annual qualification

## WHERE TO BEGIN

From District Admin, open Annual qualification.

- 1 Open or create the qualification cycle for the Grant Cycle.
- 2 Set the training, agreement, evidence, good-standing, and officer requirements.
- 3 Select Open cycle. If needed, select Enroll all active organizations.

**GrantsPost**  
Avery District | Program administrator  
District 5150

Program Admin | Committee | Decision | Funding | Awards | Notices | Messages | Account

Ask for help

← Back to Program setup

**ORGANIZATION READINESS**

**Annual qualification**  
Configure annual requirements, enroll organizations, review evidence, and decide who may participate in a Grant Cycle.

**6 existing organizations need enrollment.**  
Create neutral organization records for existing directory entries before starting qualification. [Enroll existing organizations](#)

**Qualification cycles**  
Set the yearly requirements. They become read-only when the cycle opens.

No qualification cycles have been configured.

**Add an applicant organization**  
Create any organization type without adding customer-specific application logic.

Type key:  Organization key:

Singular type label:  Plural type label:

Display name:

Legal name:

External reference:  Country:

Initial applicant representative (optional):

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

Qualified organizations can start applications and exceptions are visible for review.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Publish confirmations and signatures

## WHERE TO BEGIN

From District Admin, open Statements and signatures.

- 1 Choose the statement and the person who is allowed to sign it.
- 2 Review the exact wording before publishing. Published wording is kept with past signatures.
- 3 Publish the new version, then confirm it is assigned to the correct Grant Cycle.

**GrantsPost**  
Avery District Program administrator  
District 5150

Program Admin Committee Decision Funding Awards Notices Messages Account

Ask for help

← Back to Program setup

**REQUIRED APPROVALS**

**Statements and signatures**  
Set the statements people must agree to, how they sign, and which organization roles may sign. Published statements cannot be edited, and each signature records who signed and what they approved.

**Confirmation library**  
Add a new version whenever the statement, allowed signer, or signing method changes.

No required confirmations have been added.

**Advanced: import a confirmation**  
Paste a confirmation provided or reviewed by GrantsPost support. GrantsPost checks it before saving.

```
{
  "schemaVersion": 1,
  "key": "application-authority",
  "name": "Authorized application certification",
  "version": "2027.1",
  "status": "PUBLISHED",
  "statement": "I certify that this application is accurate and has been authorized by the applicant organization.",
  "acknowledgementLabel": "I agree and certify",
  "signatureMethod": "TYPED_NAME",
  "requiredRoleDefinitionKey": "organization-president"
}
```

Validate and import

**Assign a confirmation to a Grant Cycle**  
Choose when this exact published version is required.

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

Every required statement is tied to the correct role and Grant Cycle.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Apply policy rules

## WHERE TO BEGIN

From District Admin, open Policy rules.

- 1 Open the rule set for the Grant Cycle.
- 2 Check eligibility, request limits, matching rules, and any priority order.
- 3 Save and publish the rule version, then test it with a sample application.

**GrantsPost**  
Avery District | Program administrator  
District 5150

Program Admin | Committee | Decision | Funding | Awards | Notices | Messages | Account

Ask for help

← Back to Program setup

### APPLICATION RULES

#### Policy rules

Set the rules that apply to each Grant Cycle. To change published rules, add a new version so past applications keep the rules they used.

**Available rules**

Published rules cannot be edited. Add a new version when the rules change.

No district rules have been added. Use the import area to add approved rule settings.

**Import rules**

Paste a rules file prepared for this workspace. The system will check it before importing.

```
{
  "schemaVersion": 1,
  "key": "community-grants",
  "name": "Community grants policy",
  "version": "2022.1",
  "status": "PUBLISHED",
  "rules": [
    {
      "key": "maximum-request",
      "name": "Maximum request",
      "type": "CALCULATION",
      "priority": 10,
      "condition": { "type": "always" },
      "effects": [ { "type": "set", "target": "funding.maximumRequest", "value": { "type": "literal", "value": 10000 } } ]
    }
  ]
}
```

Check and import

**Apply rules to a Grant Cycle**

Choose which published rules this Grant Cycle should use. The priority controls which rules win if two settings conflict.

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

A sample application produces the expected limits and requirements.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Prepare reporting and closeout

## WHERE TO BEGIN

From District Admin, open Grant Reports.

- 1 Confirm each project's Project Period and Reporting Schedule before awards are issued.
- 2 Check required questions, documents, and certifications.
- 3 Use the Scheduled, Waiting for review, Due soon, Overdue, Returned for revisions, and Closed views to monitor later work. Reporting stays available after the Grant Cycle closes.

**GrantsPost**  
Avery District | Program administrator  
District 6150

Program Admin | Committee | Decision | Funding | Awards | Notices | Messages | Account

Ask for help

← Back to Program setup

**PROJECT REPORTING**

**Reporting Schedules and project closeout**

Choose when progress and final reports are due, what each report asks, which documents are required, and what must be complete before project closeout.

**Reporting rule versions**  
Each report keeps the rules that created it, even if you update the rules later.

No reporting rules have been added.

**Advanced: Import reporting setup**  
Paste a setup provided or reviewed by GrantsPost support. GrantsPost checks it before saving.

```
{
  "schemaVersion": 1,
  "key": "standard-award-reporting",
  "name": "Standard award reporting and closeout",
  "version": "2027.1",
  "status": "PUBLISHED",
  "reports": [
    {
      "key": "midpoint-progress", "title": "Midpoint progress report", "type": "PROGRESS", "sequence": 1,
      "due": { "anchor": "PROJECT_START", "offsetDays": 180 },
      "periodStart": { "anchor": "PROJECT_START", "offsetDays": 0 },
      "fields": [
        { "key": "project_status", "label": "Project status", "kind": "SHOW_TEXT", "required": true },
        { "key": "work_completed", "label": "Work completed", "kind": "LONG_TEXT", "required": true },
        { "key": "beneficiaries", "label": "Beneficiaries served", "kind": "NUMBER", "required": true },
        { "key": "changes", "label": "Challenges or approved changes", "kind": "LONG_TEXT", "required": false }
      ],
      "requireFinancialSnapshot": true,
      "requireFinalizedReconciliationThroughPeriodEnd": false
    },
    {
      "key": "Final", "title": "Final project report", "type": "FINAL", "sequence": 1,
      "due": { "anchor": "PROJECT_END", "offsetDays": 60 },
      "periodStart": { "anchor": "PROJECT_START", "offsetDays": 0 }
    }
  ]
}
```

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

Awarded projects will receive the intended report schedule and closeout checks.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Manage award acceptance and grant payments

## WHERE TO BEGIN

From District Admin, open Award acceptance and grant payments.

- 1 Open the award and check acceptance, requirements, and grant payment status.
- 2 Use Record decision for submitted requirements and grant payment requests.
- 3 After a transfer is sent, enter its date, reference, and payment proof, then select Record sent transfer.

**GrantsPost**  
Avery District Program administrator  
District 5150

Program Admin Committee Decision Funding Awards Notices Messages Account

Ask for help

← Back to Program setup

### AWARD SETUP

#### Award acceptance and grant payments

Set acceptance deadlines, required documents, payment approvals, and the steps for recording when grant funds are sent and received.

##### Award rule versions

Each award keeps the rules that applied when its acceptance and payment work began.

No policies imported.

##### Advanced: import award setup

Paste a setup provided or reviewed by GrantsPost support. GrantsPost checks it before saving.

```
{
  "schemaVersion": 1,
  "key": "standard-award-administration",
  "name": "Standard award acceptance and disbursement",
  "version": "2027.1",
  "status": "PUBLISHED",
  "acceptance": {
    "deadlineDaysFromAward": 30,
    "requiredBeforeDisbursement": true,
    "allowDecline": true,
    "allowLateAcceptance": false,
    "conditions": {
      "requireEvidence": true,
      "requireAllSatisfiedBeforeAuthorization": true,
      "allowWaiver": true
    }
  },
  "disbursement": {
    "requestInitiators": ["APPLICANT", "DISTRICT"],
    "allowPartial": true,
    "maximumDisbursements": 10,
    "allowMethods": ["ACH", "CHECK", "WIRE"],
    "requirePaymentProof": true,
    "postToLedgerOnConfirmation": true,
    "ledgerIncomeCategoryKey": "grant-funds-received",
    "ledgerAllocationTargetKey": "grant-funds",
    "decisionAuthorityPurposes": ["AWARD_ADMINISTRATOR", "AWARD_FINALIZER"]
  }
}
```

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

Acceptance and the intended grant payment are complete with supporting documents.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Review financial controls

## WHERE TO BEGIN

From District Admin, open Financial controls.

- 1 Open each item waiting for attention and compare it with its evidence.
- 2 Use Confirm returned funds for a verified return. Use Void entry only with a clear reason when a posted entry is wrong.
- 3 Confirm that no finance item still needs district action.

**GrantsPost**  
Avery District Program administrator  
District 5150

Program Admin Committee Decision Funding Awards Notices Messages Account

Ask for help

← Back to Program setup

**PROJECT FINANCES**

**Project financial rules**  
Set receipt requirements, transaction categories, bank-statement checks, unused-fund return rules, and equipment tracking for each Grant Cycle.

**Bank statements waiting for review**  
Review the difference shown for each statement. Finalizing records the result and prevents later changes.  
No bank statements are waiting for review.

**Fund returns awaiting confirmation**  
Confirming records the returned amount and includes it in future account checks.  
No submitted fund returns are waiting.

**Posted transaction corrections**  
Posted entries cannot be edited. An authorized void preserves the original record and reason: a replacement is entered as a new transaction.  
No posted transactions are available.

**Financial rule versions**  
A posted record keeps the financial rules that applied when it was created.  
No project finance rules have been added.

**Advanced: import financial setup**  
Paste a setup provided or reviewed by GrantsPost support. GrantsPost checks it before saving.

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

No financial item that needs administrator attention remains.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Manage compliance

## WHERE TO BEGIN

From District Admin, open Compliance and records.

- 1 Open each submitted compliance case and review the evidence.
- 2 Choose the allowed outcome, enter a decision note, then select Record decision.
- 3 Keep confidential matters within the people authorized to view them.

**GrantsPost**  
Avery District Program administrator  
District 5150

Program Admin Committee Decision Funding Awards Notices Messages Account

Ask for help

Back to Program setup Audit requests

**Compliance and records**  
Set the rules for purchasing, travel, safeguarding, incidents, record retention, and legal holds. You can apply different rules to each Grant Cycle.

**Items that need a compliance decision**  
Review the details and supporting documents. Then choose a decision and select Record decision.

No compliance cases require action.

**Issue a legal hold**  
An active hold blocks closeout when the applicable policy requires it.

Award: Choose an award Title:

Reason and preservation scope:

☐ Restrict descriptive details

Compliance rule versions Advanced: Import compliance rules

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

Every submitted case has a documented decision or next action.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Issue and review audit requests

## WHERE TO BEGIN

From District Admin, open Audit requests.

- 1 Create a request only when you can name the records needed, the due date, and the instructions.
- 2 For each submitted item, choose Accept item, Return item, or Waive item; add a note and select Save item review.
- 3 Close the audit only after every required item is resolved.

**GrantsPost**  
Avery District | Program administrator  
District 5150

Program Admin | Committee | Decision | Funding | Awards | Notices | Messages | Account

Ask for help

← Back to Program setup  
**RECORDS AND ASSURANCE**  
**Audit requests**  
Issue itemized record requests, receive attributable responses and evidence, return individual items, and close a complete audit trail.

**Create a request**  
Each nonblank line becomes a separately reviewable item. Use "title | description | optional" for an optional item.

Award: Choose an award (dropdown) | Response due date: mm/dd/yyyy (calendar icon)

Request title: (text input) | Linked active legal hold: No linked hold (dropdown)

Instructions: (text area) | Requested records or responses: Bank statements | All project-account statements | Vendor selection file | Quotes and conflict disclosure | Additional context | Optional narrative | optional

Create draft request (button)

**Request register**  
Issued instructions and item definitions are immutable. Evidence remains append-only.

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

All required items are resolved and the audit request is closed.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Monitor communications

## WHERE TO BEGIN

From District Admin, open Communications.

- 1 Open messages marked Needs attention.
- 2 Check in-app delivery and email delivery separately.
- 3 Use the retry action only for a failed email record. In-app delivery remains the official record.

**GrantsPost**  
Avery District Program administrator  
District 5150

Program Admin Committee Decision Funding Awards Notices Messages Account

Ask for help

Back to Program setup

### PROGRAM SETUP

## Communications

See recent grant messages, email previews, report reminders, and qualification notices for your program.

| Recent messages                    | Email messages                       | Needs attention                               |
|------------------------------------|--------------------------------------|-----------------------------------------------|
| 50                                 | 50                                   | 0                                             |
| Latest messages for this district. | Delivery mode: Local email previews. | Messages that could not be sent or previewed. |

#### Manual Tools

Send a test message, check report and qualification deadlines, or process waiting emails.

Send to my email Run reminders and expiry checks Send waiting emails

Send test email

#### Email Setup

What this affects: invitations, password resets, reminders, and other email messages.

|                                        |                                   |
|----------------------------------------|-----------------------------------|
| EMAIL DELIVERY<br>Local email previews | SETUP STATUS<br>Ready for testing |
| SENDER NAME                            | FROM EMAIL                        |

Example screen. Training names, dates, amounts, and district numbers will differ.

## YOU ARE FINISHED WHEN

No important message is left in Needs attention.

## WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

## IF SOMETHING IS NOT WORKING

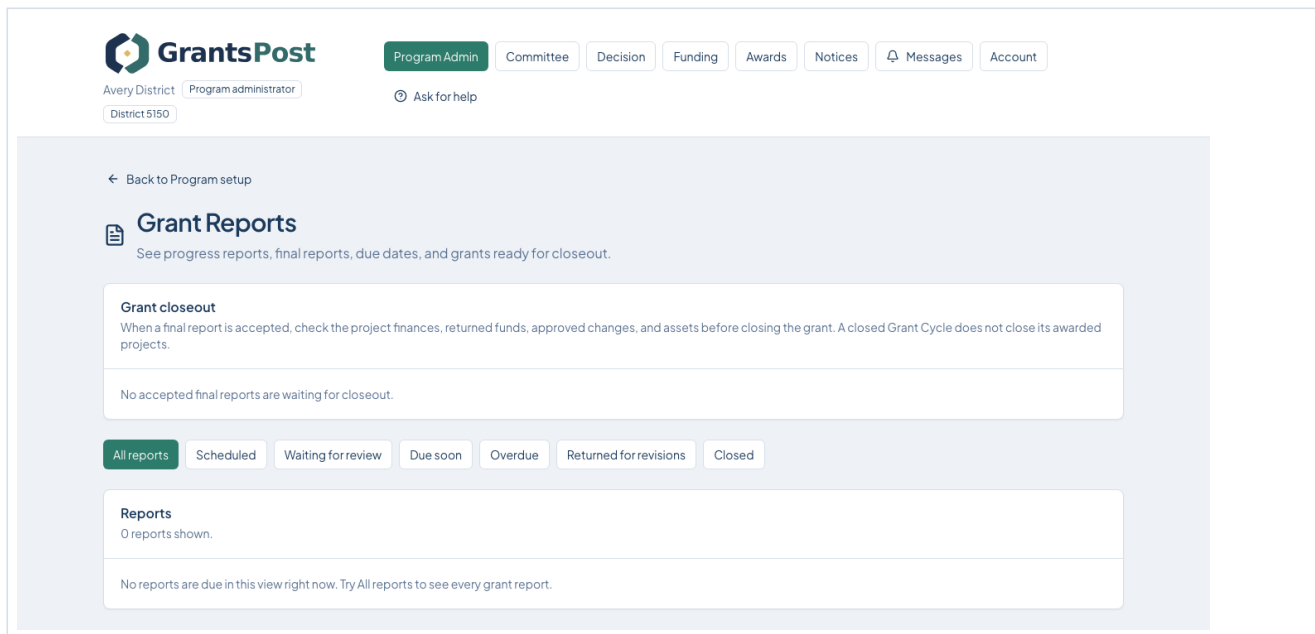
Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

# Close the grant

## WHERE TO BEGIN

From District Admin, open Grant Reports and find the accepted final report.

- 1 Select Check closeout readiness.
- 2 Resolve every item marked Needs attention, including reports, finances, returned funds, project changes, assets, compliance, and legal holds.
- 3 When every item says Ready, select Close grant. Close the project only after its final report and checks are accepted; closing its Grant Cycle is not enough.



Example screen. Training names, dates, amounts, and district numbers will differ.

### YOU ARE FINISHED WHEN

The grant status is Closed and the retention date is recorded.

### WHAT HAPPENS NEXT

The grant remains available as history; no active closeout work remains.

### IF SOMETHING IS NOT WORKING

Select the first Needs attention check, resolve it in its own page, then run Check closeout readiness again.