



Linking Services, Solutions, Communities

GrantSolutions

Grantee Guide

User Guide

October 2012

The Grants Center of Excellence

www.grantsolutions.gov

This page intentionally left blank

Contents

| | |
|--|----|
| Introduction | 4 |
| System Requirements | 4 |
| Security | 5 |
| Login to GrantSolutions.gov..... | 6 |
| Passwords and Restrictions | 7 |
| To View a Funding Opportunity (Announcement without an Account)..... | 8 |
| Applying for a Funding Opportunity | 13 |
| Self-Register | 13 |
| Request an Account from the Help Desk..... | 14 |
| Basic Screen Navigation | 17 |
| My Grants List (MGL) | 18 |
| Viewing a Notice of Grant Award (NGA)..... | 19 |
| Grant Notes..... | 20 |
| History..... | 23 |
| Post Award Management | 24 |
| Amendment Processing | 24 |
| Amendment Creation (Grantee)..... | 25 |
| Menu Navigation | 25 |
| Uploading Attachments | 32 |
| Verification and Completion | 34 |
| Menu Navigation | 35 |
| Amendment Review and Printing..... | 37 |
| Training and Support | 38 |

Introduction

The Grants COE serves as one of three consortia leads under the Grants Management Line of Business (GMLoB) E-Gov initiative offering government-wide grants management system support services. GrantSolutions.gov is a comprehensive grants management system provided by the Grants Center of Excellence (COE). As an interactive input and retrieval system, GrantSolutions allows users to perform grants management functions and maintain information related to applications and grants. Through GrantSolutions, users can maintain applicant information, recommend and award funds, and view the status of pending applications and approvals. Users can also perform award-funding calculation release and print awards, submit award data to external systems, and facilitate changes in data such as the recipient's address or the contact information of a grants management officer (GMO).

GrantSolutions consists of four modules:

- Pre-Award
- Award
- Post Award
- Administration

Each module provides independent functionality that can be used to manage a specific grant business process or combine individual modules to provide a complete grants management solution.

System Requirements

The GrantSolutions System exists in a 3-tier environment using an industry-standard *e-Commerce* capable web server, a Java Application Server, and a high-performance Oracle Database. Accessing the system is available from user's workstation using one of the following internet browsers:

- Internet Explorer 5.01 or Higher
- Netscape 4.7 or Higher

Security

The GrantSolutions system is intended for use by Grants Management and Program Staff, and our grantee business partners. OPHS staff members have access privileges based on job roles and assignment to defined “groups” within the GrantSolutions security system. Grant applicants and grantee business partners register their name and organization with GrantSolutions and receive a confidential user name and password that will provide access for online application, grant announcements, and electronic submission of post-award reports and activities.

Grants Management Modular System

A Comprehensive Grants Management System

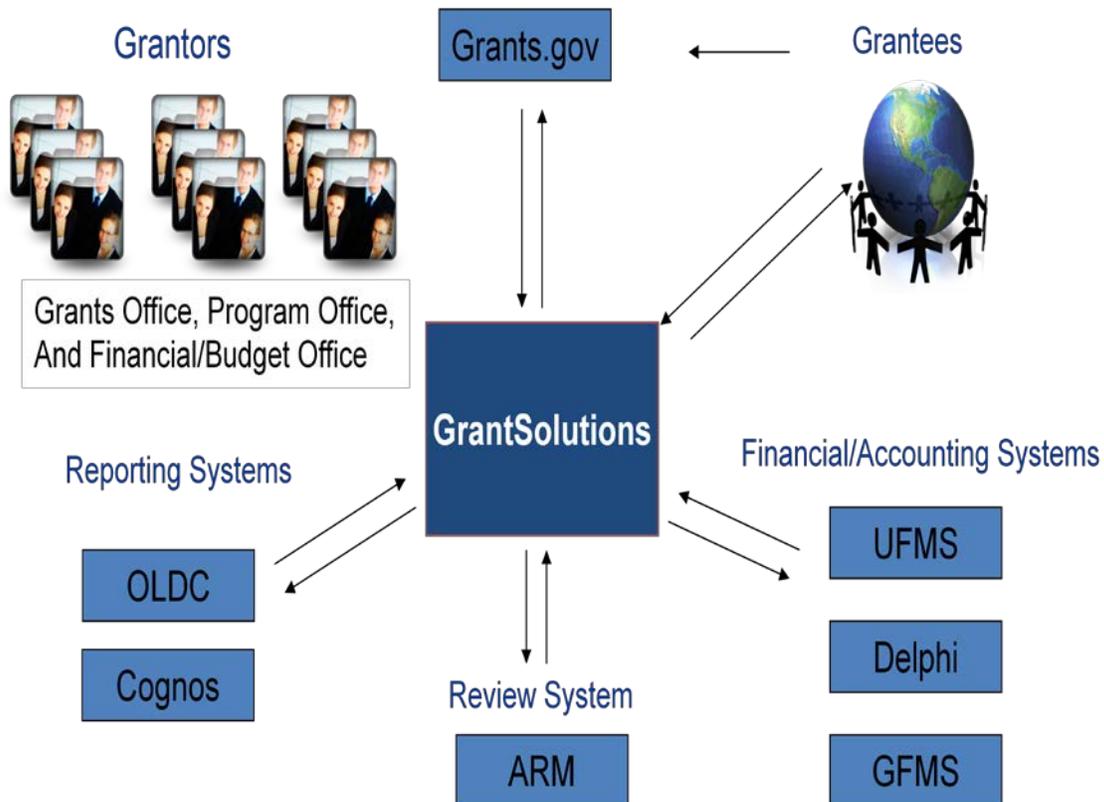


Figure 1-1 GrantSolutions Overview 1

Login to GrantSolutions.gov

To simply **view** Funding Opportunities (Announcements), you will not need to obtain an account (username and password) to log in. To **apply** for a Funding Opportunity, you will need an account to log in. If your organization has never applied or received a grant through the GrantSolutions system previously, then you can self-register. If your organization has applied or received a grant through the GrantSolutions system previously, **you will need** assistance from the GrantSolutions help desk to ensure that your account is affiliated with the correct organization. If you are accepting a grant, you **may also need** assistance from the GrantSolutions help desk to ensure that your account is affiliated with the correct organization.

- The Production URL for GrantSolutions.gov is <http://www.grantsolutions.gov/>.

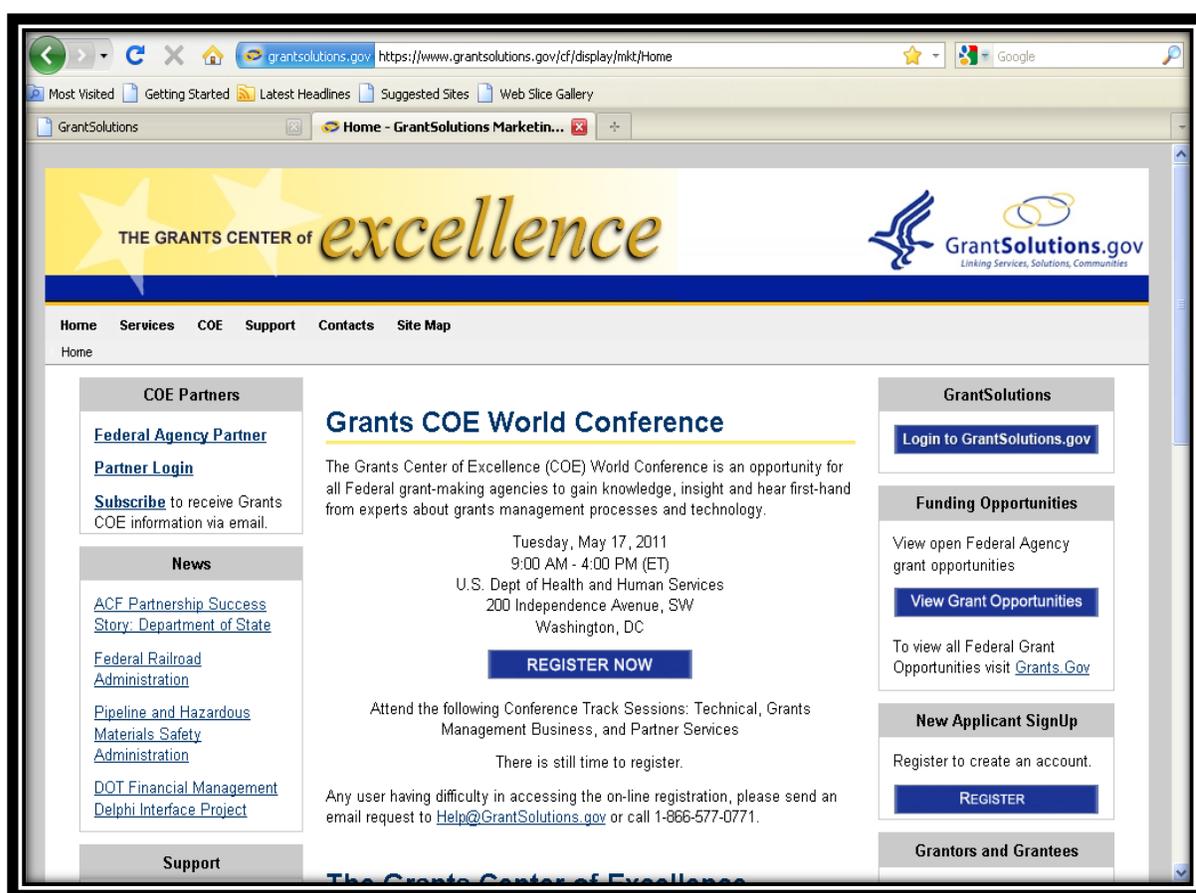


Figure 1-2 GrantSolutions Production Home Page

Note: When new employees arrive or when changes to existing accounts are needed, submit a Federal User Account Request form available by selecting the Getting Started link or by contacting your internal GrantSolutions Technical Coordinator, GrantSolutions Support team, or Partner Project Director (PPD). The first time you log into the GrantSolutions system, you will be required to set your own password. After setting your own password, you will then be returned to the login screen to enter the username and password that you indicated. For existing user accounts that have already been established, you may reset your password or unlock your account by pressing the Reset Password/Unlock Account link.

Passwords and Restrictions

When setting your own password, you must ensure that the password complies with the following restrictions.

- The minimum number of characters a password must contain is 8.
- At least one upper-case, one lower-case, one number, and one special character must be used. (Special characters include: ! @ # \$ % & * = ? < >)
- The password cannot begin with a numeric character.
- User accounts are locked out for 2 hours after three consecutive unsuccessful login attempts. Use the password reset function to unlock a locked account or contact the Custom Application Support & Training support center for assistance.
- Passwords remain valid for 60 days and users will be prompted to change the password as the expiration date draws near.

To View a Funding Opportunity (Announcement without an Account)

Menu Navigation

View a Funding Opportunity (Announcement without an Account):

1. Visit <http://grantsolutions.gov/>.
2. Click the **View Grant Opportunities** link. The Grant Announcements screen will appear. This page allows you to view Funding Opportunities (Grant Announcements) that are open to the general public.

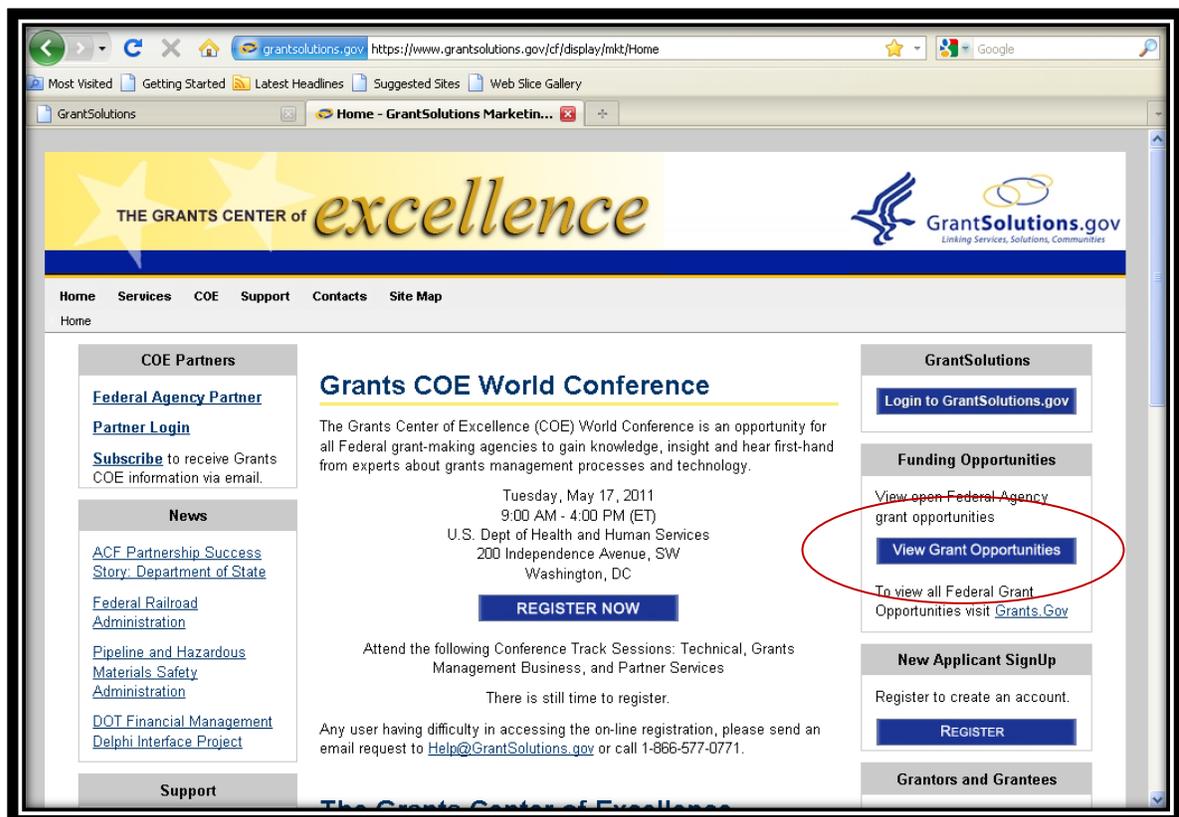


Figure 1-3 View Grant Opportunities from Home Page

GrantSolutions.gov

GrantSolutions-3.17 05/07/2011

GrantSolutions.gov

Grant Announcements

Please enter selection criteria to view the available announcements.
Or to view all announcements, just press search:

Program:

Program Office:

CFDA:

GrantSolutions User Support | (202) 401-5282 or (866) 577-0771 | help@grantsolutions.gov
[Contact Us](#) | [Web Accessibility](#) | [Privacy and Security Notice](#) | [Freedom of Information Act](#) | [Disclaimers](#)

Figure 1-4 Grant Announcement Search Page

3. Select a **Grant Program**, **Program Office** and/or the **CFDA Number** from the drop down box and click on **Search**. To view all Funding opportunities, leave the Grant Program, Program Office and CFDA fields blank (set to Default ALL) and click on **Search**. The Grant Announcements screen will reload with the list of Funding Opportunities.

GrantSolutions.gov GrantSolutions-3.17 05/07/2011


GrantSolutions.gov

Grant Announcements

Please enter selection criteria to view the available announcements.
Or to view all announcements, just press search:

Program:

Program Office:

CFDA:

Click on the link provided in the announcement title to view details about the selected announcement.
Click on the link in the column titles to sort the list by that column.

Number of Announcements: 9

| Announcement Title | Program | Program Office | Grant Program | CFDA | Due Date |
|---|--|--|---|----------------------|--------------------------|
| 2012 PHMSA HMEP Native American Tribes | Hazardous Materials Safety | Hazardous Materials Safety Program Office | Hazardous Materials Emergency Preparedness | 20.703 | 06/01/2011 05:00 PM EST |
| 2012 PHMSA HMEP SPSTG | Hazardous Materials Safety | Hazardous Materials Safety Program Office | Hazardous Materials International Association of Firefighters | 20.703 | 06/01/2011 05:00 PM EST |
| 2012 PHMSA HMEP States & Territories | Hazardous Materials Safety | Hazardous Materials Safety Program Office | Hazardous Materials Emergency Preparedness | 20.703 | 06/01/2011 05:00 PM EST |
| 2012 PHMSA HMIT | Hazardous Materials Safety | Hazardous Materials Safety Program Office | Hazardous Materials Instructor Training | 20.703 | 06/01/2011 05:00 PM EST |
| 2011 Announcement of Availability of Funds for One Cooperative Agreement to Publish Public Health Reports | General | OPHS/OSG - Central Office | Public Health Reports | 93.879 | 06/01/2011 06:00 PM EST |
| Grants to Support the Historically Black Colleges and Universities Health Services | Centers For Medicare & Medicaid Services | COA/Office of Research, Development & Information - Program Office | Historically Black College & Universities(HBCU) | 93.779 | 06/21/2011 05:00 PM EST |
| Grants to Support the Hispanic Health Services Research Grant Program | Centers For Medicare & Medicaid Services | COA/Office of Research, Development & Information - Program Office | Hispanic Health Services(HHS) | 93.779 | 06/23/2011 05:00 PM EST |
| FY11 Announcement of Anticipated Availability of Funds for Family Planning Services Grants (Florida, Greater Miami area). | Family Planning | OPHS/OPA/OFP Region IV - Atlanta, GA | Family Planning Services | 93.217 | 06/29/2011 08:00 PM EST |
| FY11 Announcement of Anticipated Availability of Funds for Family Planning Services Grants (Illinois, Chicago Area). | Family Planning | OPHS/OPA/OFP Region V - Chicago, IL | Family Planning Services | 93.217 | 06/29/2011 08:00 PM EST |
| Announcement Title | Program | Program Office | Grant Program | CFDA | Due Date |

DISCLAIMER:
The official source for announcements of grants and cooperative agreement opportunities is the Federal Register. The electronic version of these announcements is provided as a convenience. In the event of any conflict between the content of the electronic version and the Federal Register version, you should rely on the information in the Federal Register.

Figure 1-5 Select specific announcement on summary list page

- Click the **Announcement Title** link of the desired Announcement. A synopsis (summary of the announcement will appear.

GrantSolutions.gov

GrantSolutions.gov

2011 Announcement of Availability of Funds for One Cooperative Agreement to Publish Public Health Reports

Disclaimer:

Notes:

Announcement: 2011 Announcement of Availability of Funds for One Cooperative Agreement to Publish Public Health Reports
Program Office: OPHS/OSG - Central Office
Grant Program: Public Health Reports
CFDA: 93.879
Due Date: 06/01/2011 06:00 PM (GMT - 05:00) Eastern Time (US & Canada)

To apply for this announcement, you may:

- Submit an electronic application:**
 In order to apply for new funding opportunities which are open to the public for competition, you may access the Grants.gov website portal. All funding opportunities and application kits are made available on Grants.gov. If your organization has/had a grantee business relationship with a grant program serviced by the Office of Grants Management, and you are applying as part of ongoing grantee related activities, please access GrantSolutions.gov. In order to apply electronically you must first have a GrantSolutions user account. If you are already an existing grantee, please login to GrantSolutions using your existing grantee username and password. If you do not remember your account information or have not been assigned a grantee account, please contact the GrantSolutions Help Desk at (866)577-0771 or by email at help@grantsolutions.gov. GrantSolutions provides you the ability for existing grantee organizations to submit their entire application online. However, please note that all required signatures must still be "original hardcopy signatures" and must be received by the Grants Servicing Office by the due date requirements as specified in the grant announcement.
- Submit a paper application:**
 Please print, complete, and mail the required application kit enclosures to the Grants Servicing Office by the due date requirements as specified in the grant announcement.

Agency Contacts:
 Administrative and budgetary requirements:
 OASH Grants Management Office
 240-453-8822

Program Requirements or Technical Assistance:
 CAPT Janice Huy, Acting Editor, Public Health Reports
 613-533-8642
Jhuy@cdc.gov

| | |
|--|---|
| Grant Announcement | |
| 2011 PHR Announcement | View PDF Version View Original Version |
| Information for the Applicant | |
| Executive Order 12372 - Intergovernmental Review (SPOC List) | View Web Page |
| Project Abstract Summary | View PDF Version View Original Version |
| SF 424 Budget Form Download for Printing | View PDF Version View Original Version |
| SF424A Form Download for Printing | View PDF Version View Original Version |
| SF424B Download for Printing | View PDF Version View Original Version |

Close

Figure 1-6 View sample PDF document from synopsis page

Note: The Synopsis may include a link for downloading a full version of the announcement. By downloading the full version of the announcement, users can read eligibility requirements and criteria that should be considered before applying for the grant.

5. Scroll down the Synopsis to find the Grant Announcement section, click on the **View PDF Version** link to the right of the Announcement title and the file will begin to download in the Adobe reader. The Adobe reader is required for downloading the full Funding Opportunity/Announcement.

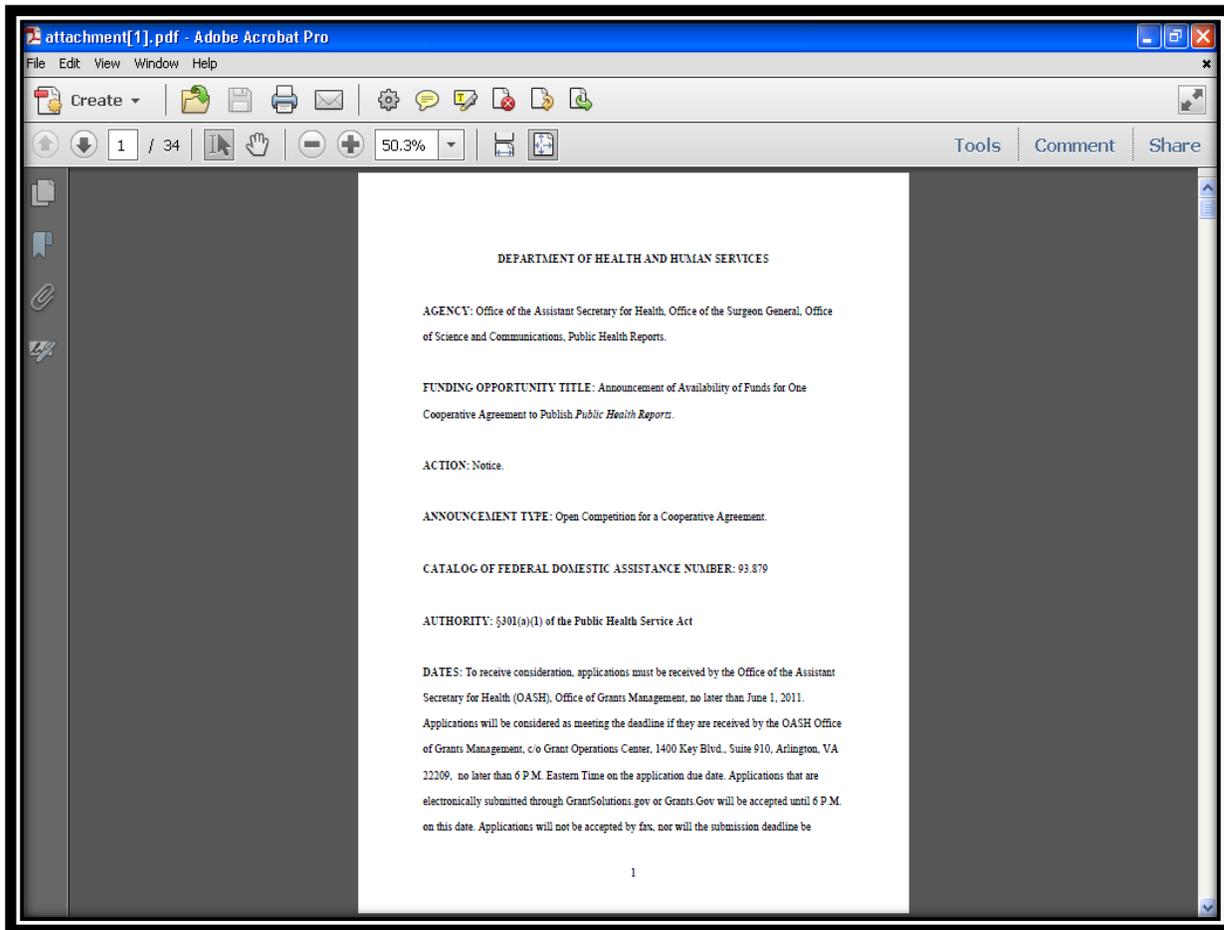


Figure 1-7 Typical PDF Document viewed from announcement page

Note: Clicking on the **View Original Version** link to the right of the Announcement title will direct you to the login page of GrantSolutions. You must have a Username/Password to utilize this feature.

Applying for a Funding Opportunity

Has your organization ever received a grant that was processed in the GrantSolutions system? If not, you can self-register to receive an account (username and password) needed to apply for a grant. If so, you should have the helpdesk create your account so that it is associated with your organization and thus ensure that the process of accepting a grant proceeds smoothly if you receive a grant. You will need to download the appropriate forms, fill them out, scan them, and then email those forms back to the helpdesk to get an account (username and password).

Self-Register

Menu Navigation

Self-Register only if you know that your organization **has never processed** an application in GrantSolutions before:

1. Visit <http://grantsolutions.gov/>.
2. Click **REGISTER** link. The Welcome to the GrantSolutions New Organization Registration Page will appear.

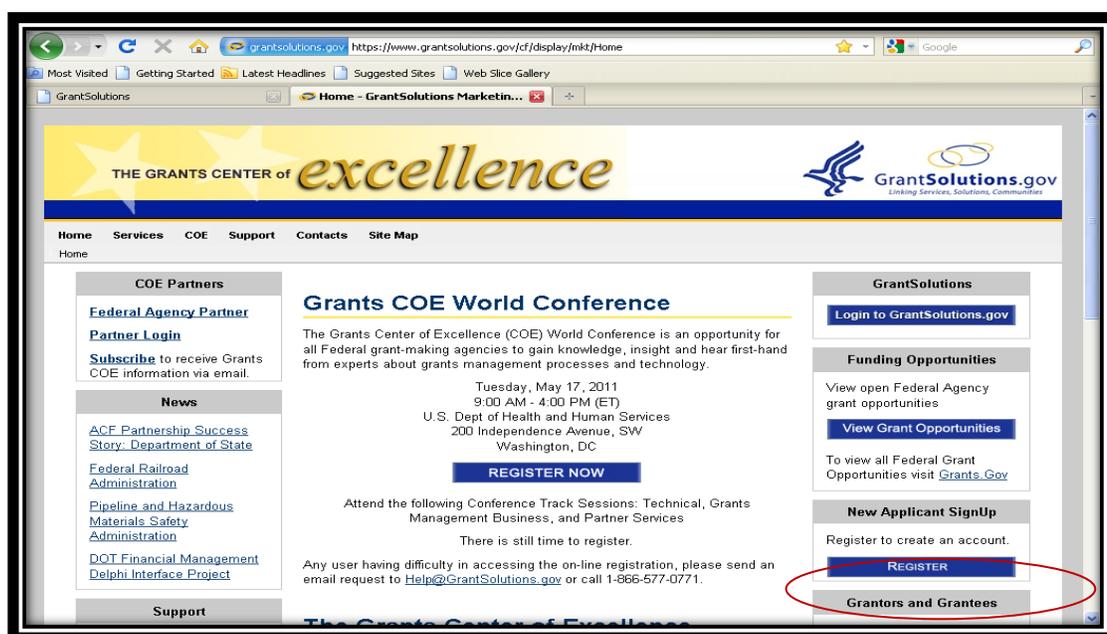
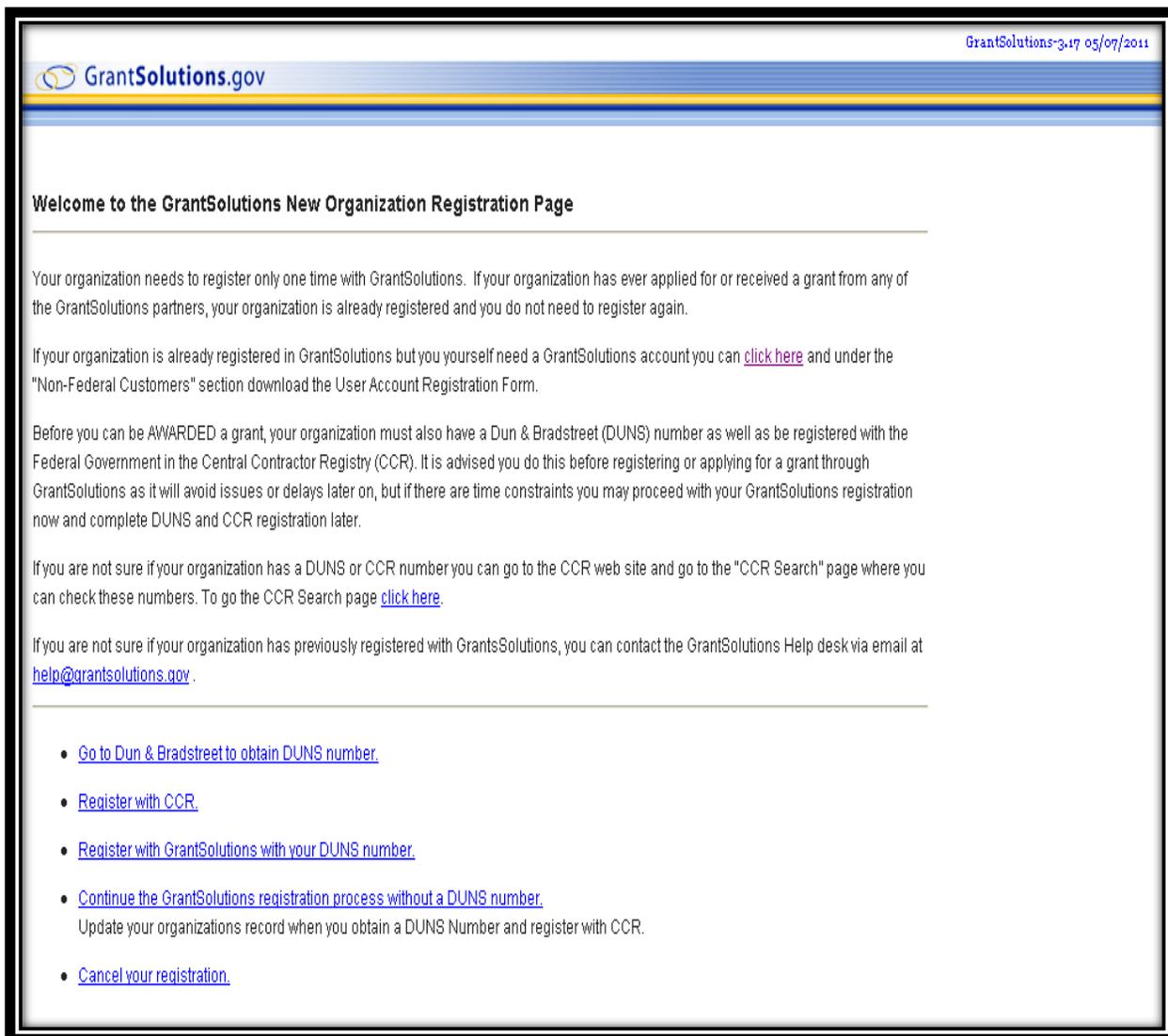


Figure 1-8 Self Registration Link on home page



The screenshot shows the GrantSolutions.gov website interface. At the top right, it says 'GrantSolutions-3.17 05/07/2011'. The main heading is 'Welcome to the GrantSolutions New Organization Registration Page'. Below this, there are several paragraphs of text providing instructions on registration, including requirements for DUNS and CCR numbers, and links for further assistance. A bulleted list at the bottom provides specific steps for registration and account management.

Welcome to the GrantSolutions New Organization Registration Page

Your organization needs to register only one time with GrantSolutions. If your organization has ever applied for or received a grant from any of the GrantSolutions partners, your organization is already registered and you do not need to register again.

If your organization is already registered in GrantSolutions but you yourself need a GrantSolutions account you can [click here](#) and under the "Non-Federal Customers" section download the User Account Registration Form.

Before you can be AWARDED a grant, your organization must also have a Dun & Bradstreet (DUNS) number as well as be registered with the Federal Government in the Central Contractor Registry (CCR). It is advised you do this before registering or applying for a grant through GrantSolutions as it will avoid issues or delays later on, but if there are time constraints you may proceed with your GrantSolutions registration now and complete DUNS and CCR registration later.

If you are not sure if your organization has a DUNS or CCR number you can go to the CCR web site and go to the "CCR Search" page where you can check these numbers. To go the CCR Search page [click here](#).

If you are not sure if your organization has previously registered with Grantsolutions, you can contact the GrantSolutions Help desk via email at help@grantsolutions.gov.

- [Go to Dun & Bradstreet to obtain DUNS number.](#)
- [Register with CCR.](#)
- [Register with GrantSolutions with your DUNS number.](#)
- [Continue the GrantSolutions registration process without a DUNS number.](#)
Update your organizations record when you obtain a DUNS Number and register with CCR.
- [Cancel your registration.](#)

Figure 1-9 Self Registration instruction page

Request an Account from the Help Desk

Existing Grantee Organizations or users who have previously applied on GrantSolutions should always request a new account from the GrantSolutions Help Desk. This process is necessary so that the correct Organization is mapped to the new account user.

Menu Navigation

To Request an Account from the Help Desk:

1. Visit <http://grantsolutions.gov/>.
2. Click **Getting Started** link. The Getting Started screen will appear.

THE GRANTS CENTER of *excellence*

GrantSolutions.gov
Linking Services, Solutions, Communities

Home Services COE Support Contacts Site Map

Home

COE Partners

[Federal Agency Partner](#)
[Partner Login](#)
[Subscribe](#) to receive Grants COE information via email.

News

[ACF Partnership Success Story: Department of State](#)
[Federal Railroad Administration](#)
[Pipeline and Hazardous Materials Safety Administration](#)
[DOT Financial Management](#)
[Delphi Interface Project](#)

Support

8AM - 6PM EST
Monday - Friday
help@grantsolutions.gov
1-866-577-0771 and 202-401-5282

Grants COE World Conference

The Grants Center of Excellence (COE) World Conference is an opportunity for all Federal grant-making agencies to gain knowledge, insight and hear first-hand from experts about grants management processes and technology.

Tuesday, May 17, 2011
9:00 AM - 4:00 PM (ET)
U.S. Dept of Health and Human Services
200 Independence Avenue, SW
Washington, DC

The conference capacity has been exceeded. No further registrations are being taken. Conference information will be posted shortly after the conference.

The Grants Center of Excellence

The Grants Center of Excellence (COE) serves as one of three consortia leads under the Grants Management Line of Business (GMLoB) E-Gov initiative offering government-wide grants management system support services. The COE is managed by the Administration for Children and Families (ACF) within the Department of Health and Human Services in partnership with 17 agencies as of September 2008.

To learn more, you may go to the following:

- [GrantSolutions.gov Overview \(ppt - 3.82 MB \)](#)
- [GrantSolutions.gov Overview \(txt - 8 kb \)](#)
- [COE Brochure \(2006-2007\) \(pdf - 397 kb \)](#)
- [COE Brochure \(2006-2007\) \(txt - 4 kb \)](#)

GrantSolutions

[Login to GrantSolutions.gov](#)

Funding Opportunities

View open Federal Agency grant opportunities

[View Grant Opportunities](#)

To view all Federal Grant Opportunities visit [Grants.Gov](#)

New Applicant SignUp

Register to create an account.

[REGISTER](#)

Grantors and Grantees

[Getting Started](#) information on how to register to obtain a new grantor or grantee account.

[Grantee/Applicant User Manual](#) (pdf, 6.49mb)

Get ADOBE® READER®

Office of Management and Budget

Figure 1-10 Getting started link on the home page

The screenshot shows the GrantSolutions.gov website. At the top, there is a navigation bar with links for Home, Services, COE, Support, Contacts, and Site Map. Below this is a sub-navigation bar with links for Home, Customer Support, and Getting Started. The main content area is titled 'Getting Started' and contains three sections: 'Obtain a User Account', 'Federal Staff', and 'Grantees'. Each section provides instructions on how to obtain a user account, including a list of required documents and contact information for the Help Desk. The 'New Applicants' section provides a link to the web form for creating a new account. The 'Grant Opportunities' section provides a link to Grants.gov. The 'Login' section provides a link to the login page.

THE GRANTS CENTER of excellence

GrantSolutions.gov
Linking Services, Solutions, Communities

[Home](#) [Services](#) [COE](#) [Support](#) [Contacts](#) [Site Map](#)

[Home](#) [Customer Support](#) [Getting Started](#)

Getting Started

Obtain a User Account

Federal Staff

All account requests must be made by the prospective user's supervisor or other authorized partner/agency official.

1. The requester must complete and sign the first section of the Account Request Form.
2. The person who will be receiving access needs to:
 - Sign and date the second part of the forms (Data Access/Security Compliance Statement)
 - Sign and date the main signature page and the Addendum signature page in the HHS Rules of Behavior. (Alternatively, you may substitute a signed copy of the Rules and Behavior form from your own Department/Agency)
 - Attach a copy of their Government HSPD-12 Identification Card (PIV)
3. Submit all required documents to the GrantSolutions Help Desk via email at help@grantsolutions.gov or fax the documents to the Help Desk at (301) 231-7223.

If you have any questions, you may call the Help Desk at (202) 401-5282 or (866) 577-0771.

- GrantSolutions Federal User Account Request Form ([pdf - 197 kb](#))

Grantees

All account requests must be made by the prospective user's supervisor or other authorized organization official

1. The requester must complete and sign the first section of the Account Request Form.
2. The person who will be receiving access needs to:
 - Sign and date the second part of the forms (Data Access/Security Compliance Statement)
 - Sign and date the main signature page in the HHS Rules of Behavior.
3. Submit all required documents to the GrantSolutions Help Desk via email at help@grantsolutions.gov or fax the documents to the Help Desk at (301) 231-7223.

If you have any questions, you may call the Help Desk at (202) 401-5282 or (866) 577-0771.

- GrantSolutions Grantee User Account Request Form ([pdf - 192kb](#))

New Applicants

If your organization has never applied or had a grant with any of our Partners, go to the [web form](#) on the GrantSolutions.gov site to create a new Applicant account.

Grant Opportunities

[Grants.gov](#) [GrantSolutions.gov](#)

Login

[Login to GrantSolutions.gov](#)

Figure 1-11 Screen for getting started on obtaining an account

3. Scroll down to the section labeled Non- Federal Customers (Existing Grantees and Prior Applicants). Click on the link for GrantSolutions Applicant/Grantee User Account Registration Form.

Basic Screen Navigation

The basic Menu items are clustered at the very top of the Home page or My Grants List. A brief description of these menu items is listed below:



Figure 1-12 Basic Menu Banner Links

| Menu Item | Description |
|----------------------------|--|
| Account Management | If you need to edit any of your user information you will go to Account Management. Under update profile you |
| Funding Opportunity | You will go to Funding Opportunity to see all grants that you are eligible to apply for. Once you review the Grant Announcement, you can apply from this screen. You will access your non-competing continuation application from this menu option. After you have submitted your non-competing application, you will access it from the Applications menu. |
| Applications | Once you have started to fill in an application online, you can access the application and any previously entered applications from this menu item. |
| Grants | The Grants link on the menu contains My Grants List (MGL), which is a central point of management for all grants assigned to a user. Most grant information may be obtained, and Post Award actions may be controlled, from this location. The MGL lists all awarded grants. |
| Reports | The Reports section allows you to fill out the Federal Financial Report, the Financial Status Report, and the FPAR When the time comes. Additional training material on the FSR module is available under the Help section of GrantSolutions. |
| Help/Support | The Help/Support link will give you the contact information for the GrantSolutions Helpdesk, as well as user manuals, and release notes. |

My Grants List (MGL)

The My Grants List is a central point of management for all grants assigned to a user. Most grant information may be obtained, and Post Award actions may be controlled, from this location. The MGL lists all awarded grants. By default the MGL displays all “Live Grants.”

Menu Navigation

To explore the My Grants list screen:

1. Visit <http://grantsolutions.gov/>.
2. Click **Login to GrantSolutions.gov** link. The GrantSolutions Login page will appear.
3. Enter **Username** and **Password**. After **LOG IN**, The My Grants List screen will appear.
4. Click the **Show Expired Grants** link to view grants that have expired. To return, select the Show Live Grants link.



Figure 1-13 My Grants List

In addition to providing detailed summary info for each grant, the MGL far right corner provides key action links for additional information and tools for managing existing grants and amendments. Information for each grant: These basic actions include View NGA, Grant Notes, Send Message, History and Management Amendments. These actions are briefly described below:

Viewing a Notice of Grant Award (NGA)

Menu Navigation

To view a Notice of Grant Award (NGA):

1. Visit <http://grantsolutions.gov/>.
2. Click **Login to GrantSolutions.gov** link. The GrantSolutions Login page will appear.
3. Enter **Username** and **Password**. Click **LOG IN** button. The My Grants List screen will appear.

The NGA is a legally binding document that notifies a grantee and others that a grant has been funded. It contains or references all terms and conditions of an award and documents the obligation of federal funds.

The screenshot displays the 'My Grants List' interface on GrantSolutions.gov. A PDF document is open in a browser window, showing the following details:

| 1. AWARDCING OFFICE: | | 2. ASSISTANCE TYPE: | | 3. AWARD NO.: | | 4. AMEND. NO.: | |
|--|----|----------------------------|---|---|---------|----------------|--|
| Administration for Native Americans | | Discretionary Grant | | 59L0511-02-01 | | 1 | |
| 5. TYPE OF AWARD: | | 6. TYPE OF ACTION: | | 7. AWARD AUTHORITY: | | | |
| Grant | | Supplement | | FA-105477 | | | |
| 8. BUDGET PERIOD: | | 9. PROJECT PERIOD: | | 10. CAT NO.: | | | |
| 09/30/2011 THRU 09/30/2012 | | 09/30/2010 THRU 09/30/2013 | | 03.587 | | | |
| 11. RECIPIENT ORGANIZATION: | | | | 12. PROJECT / PROGRAM TITLE: | | | |
| State Child Care 234 Upper Box Elder Rd Box 606, MT 2921-4723 Grantee Authority Office: Maeddy Henry, President | | | | Rocky Boy Child Language Nest Project | | | |
| 13. COUNTY: | | 14. CONGR. DIST.: | | 15. PRINCIPAL INVESTIGATOR OR PROGRAM DIRECTOR: | | | |
| FBI | | 00 | | Edward Z. Stanger Director of Foundations and Research | | | |
| 16. APPROVED BUDGET: | | | | 17. AWARD COMPUTATION: | | | |
| Personnel..... | \$ | 178,919 | A. NON-FEDERAL SHARE..... | \$ | 84,454 | 20% | |
| Fringe Benefits..... | \$ | 84,120 | B. FEDERAL SHARE..... | \$ | 337,932 | 80% | |
| Travel..... | \$ | 4,250 | A. TOTAL FEDERAL SHARE..... | | | | |
| Equipment..... | \$ | 0 | \$ 337,932 | | | | |
| Supplies..... | \$ | 2,900 | B. UNOBLIGATED BALANCE FEDERAL SHARE..... | | | | |
| Contractual..... | \$ | 0 | \$ 287,932 | | | | |
| Facilities/Construction..... | \$ | 0 | C. FPO. SHARE AWARDED THIS BUDGET PERIOD..... | | | | |
| Other..... | \$ | 0 | \$ 60,000 | | | | |
| Direct Costs..... | \$ | 120,943 | 18. AMOUNT AWARDED THIS ACTION..... | | | | |
| Indirect Costs..... | \$ | 44,176 | \$ 60,000 | | | | |
| Total..... | | \$ 307,039 | 19. AUTHORIZED TREATMENT OF PROGRAM INCOME..... | | | | |
| | | | Additional Costs Additional Costs | | | | |

Below the PDF, the status is shown as (Supplement) with a link to 'Apply For Non Competing Award'. The non-competing status is 'LATE' and the non-competing due date is '05/11/2012'.

Figure 1-14 PDF View of NGA

Grant Notes

Similar to the Application Notes feature in GrantSolutions Pre-Award Module, Grant Notes allow users to add a “Correspondence” note that is attached to an application.

Menu Navigation

To add a grant note:

1. Visit <http://grantsolutions.gov/>.
2. Click **Login to GrantSolutions.gov** link. The GrantSolutions Login page will appear.
3. Enter **Username** and **Password**. Click **LOG IN** button. The My Grants List screen will appear.
4. Click the **Grant Notes** link adjacent to the grant you wish to view. Grant Notes opens in a separate browser window and displays a comprehensive list of all Grant Notes that exist over the entire Project Period. For each note, the date, grant number, subject, and author are displayed.

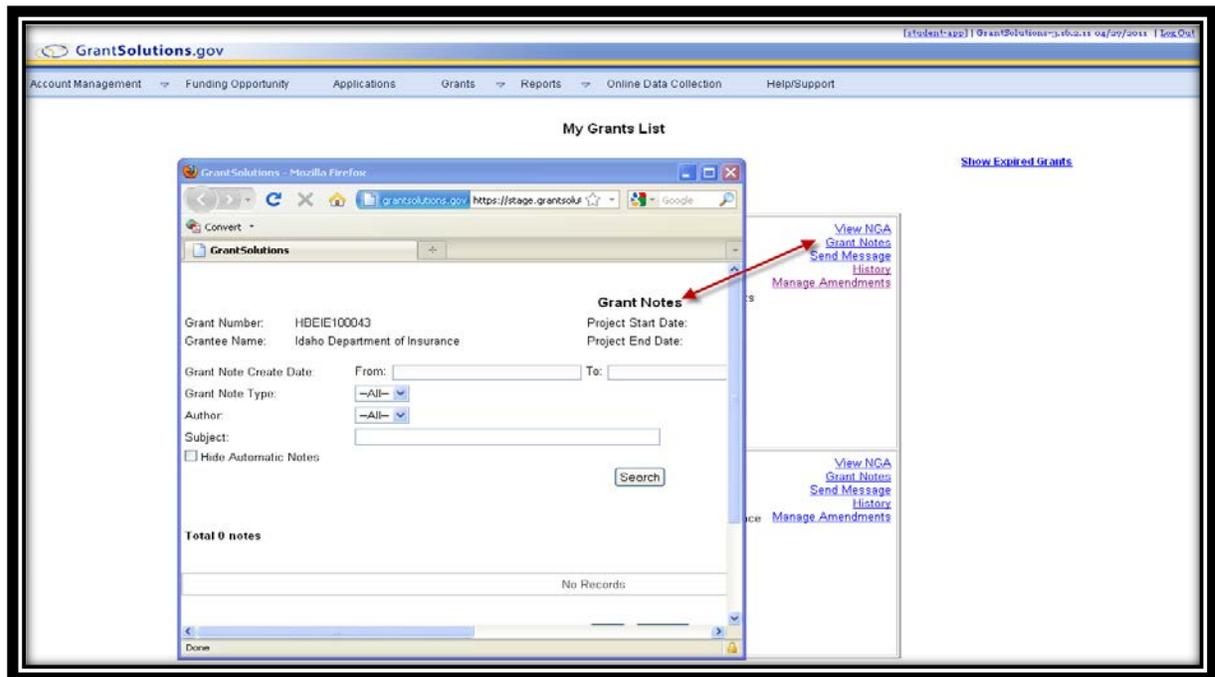


Figure 1-15 Grant notes popup from My Grants List

5. Click the **View** link in the Action column to view the full text.
6. Click the **Cancel** button to return to the My Grants List page.

Grant Notes

Grant Number: HBEIE100043 Project Start Date: 09/30/2010
Grantee Name: Idaho Department of Insurance Project End Date: 09/29/2011

Grant Note Create Date: From: To:

Grant Note Type:

Author:

Subject:

Hide Automatic Notes

Search Filters for existing Grant Notes

Total 0 notes

No Records

Figure 1-16 Grant notes search screen

7. Click the **Add** button.
8. Enter the required information and include a file attachment (if desired) using the **Browse** button.

Grant Notes - Add

Author: Rick RouseApp

*Subject:

*Note Type:

*Category Type:

*Notes: (Limit to 2000 characters)

Note Text

↔

Note Attachments

Description:

File to Upload:

Completed Attachment

↖

| Description | Source Attachments | Status | Actions |
|-------------|-------------------------|------------|---------|
| Market Plan | ACME Marketing Plan.doc | SUCCESSFUL | |

* Status updates every 10 seconds

Figure 1-17 Grant notes add/edit page

9. Click the **Add** button to save the new note. If the note contains a file upload, then that file will be scanned for viruses and converted to Adobe PDF format.
10. Click the **Add** button to save the new note. If the note contains a file upload, then that file will be scanned for viruses and converted to Adobe PDF format.

Note: Grant Notes are permanent. Once a note is added, it may not be removed. Additionally, the grants note file includes all Application Notes that are associated with specific applications under the grant.

History

The Grant History page tracks all applications or grant actions throughout the grant's entire project period. It allows the grantee to access all applications that have been submitted (e.g., Non-Competing Continuation, Competing Continuation, New, Post Award Amendments), and the NGA associated with the application, if an award was made.

Menu Navigation

To view a past application or a PDF version of your NGA:

1. Visit <http://grantsolutions.gov/>.
2. Click **Login to GrantSolutions.gov** link. The GrantSolutions Login page will appear.
3. Enter **Username** and **Password**. Click **LOG IN** button. The My Grants List screen will appear.
4. Click the **History** link. The Grant History screen will appear.

| Application Number | Grant Number | Action Date | Project Period | Budget Period | Award Amount | Application Type | Status | Action |
|--------------------|--------------------|-------------|--------------------------|--------------------------|--------------|---|---------|--|
| IX02010000018 | IXOCMS030390-01-02 | 06/16/2010 | 06/01/2009 to 05/31/2011 | 06/01/2009 to 05/31/2011 | \$59,382 | Post Award Amendment (Supplement) | Awarded | View NGA |
| IX02010000017 | IXOCMS030390-01-01 | 04/02/2010 | 06/01/2009 to 05/31/2011 | 06/01/2009 to 05/31/2011 | (\$59,382) | Post Award Amendment (Grant Closeout) | Amended | View NGA |
| IXMPPA243235 | IXOCMS030390-01-00 | 05/29/2009 | 06/01/2009 to 05/31/2011 | 06/01/2009 to 05/31/2011 | \$59,382 | New | Amended | View Application View NGA |

Figure 1-18 Grant history summary screen

The Grant History page provides the following information for each application: Assigned Application number, Grant number, Action date (approval/disapproval action date), Application Type, and the Award amount (if applicable).

Post Award Management

The Post Award Module is one of the more powerful tools or subsystems within GrantSolutions. This module allows Grantees the ability to electronically submit, track and manage applications; process amendments types; and communicate with the Federal Staff.

To illustrate some of these features, the following guide introduces the reader to the amendment processing which is one of the more common post award activities in GrantSolutions.

Amendment Processing

The GrantSolutions Post Award Module provides the user the ability to create and manage amendments for previously awarded grants. The amendment process is both intuitive and simple for both the Grantee and Grantor communities.

| Type | Description |
|-------------------|--|
| Grantee Initiated | Grantees login to GrantSolutions, select an option to view/manage amendments, and fill out all online forms. |
| Federal Initiated | Fed Staff manage the entry of data and fill out any online forms. |

Figure 1-19 Amendment Initiation

For each type of amendment chosen (i.e., *budget revision, expansion, change PI/PD*), there is an associated default application kit which contains online on line forms, enclosures and basic information pertaining to that type of amendment.

The amendment process is structured on several factors which would include: 1) who can initiate and edit an amendment 2) and who has authority to verify and submit the final application. Thus, amendment processing can vary depending on the program submission protocol for both the Grantee Organization and Program/Grants Office.

This job-aid will primarily instruct a Grantee on how to initiate an amendment. For more detailed information on specific functions in GrantSolutions the user is directed to the detailed Grantee Guide posted under the help link on the Grantee's Log in Screen. This guide covers more comprehensive topics including user accounts, login in, basic screen navigation, My Grants list, Application Control Checklist and applying for funding opportunities.

Amendment Creation (Grantee)

Menu Navigation

1. Log into GrantSolutions and access the **MY GRANTS LIST** screen.

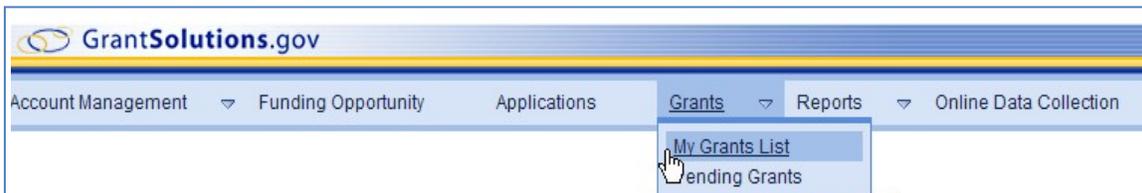


Figure 1-20 GrantSolutions Banner Link to My Grants List

2. Scroll down the grants lists summary to locate the applicable grant requiring post administration.

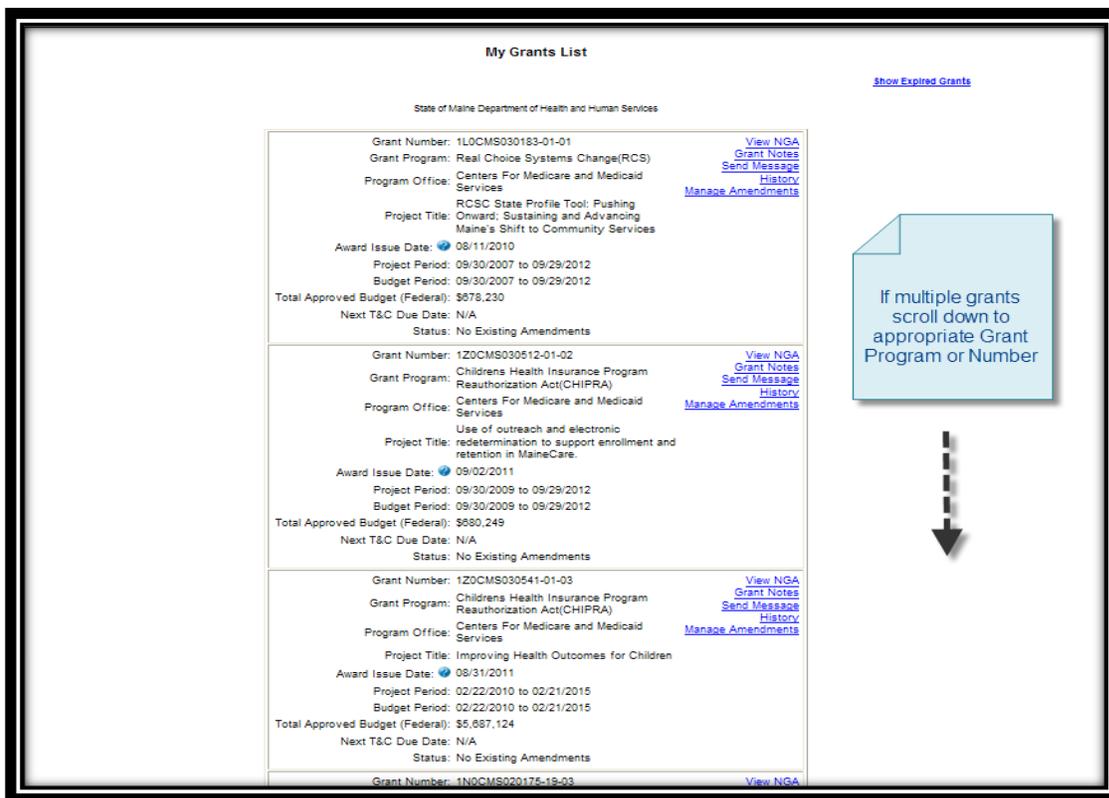


Figure 1-21 My Grant List Summary Screen

3. Click the **MANAGE AMENDMENTS** link.



Figure 1-22 Manage Amendment Link

4. The Manage Amendments screen will appear. Select **NEW** to begin the amendment process.

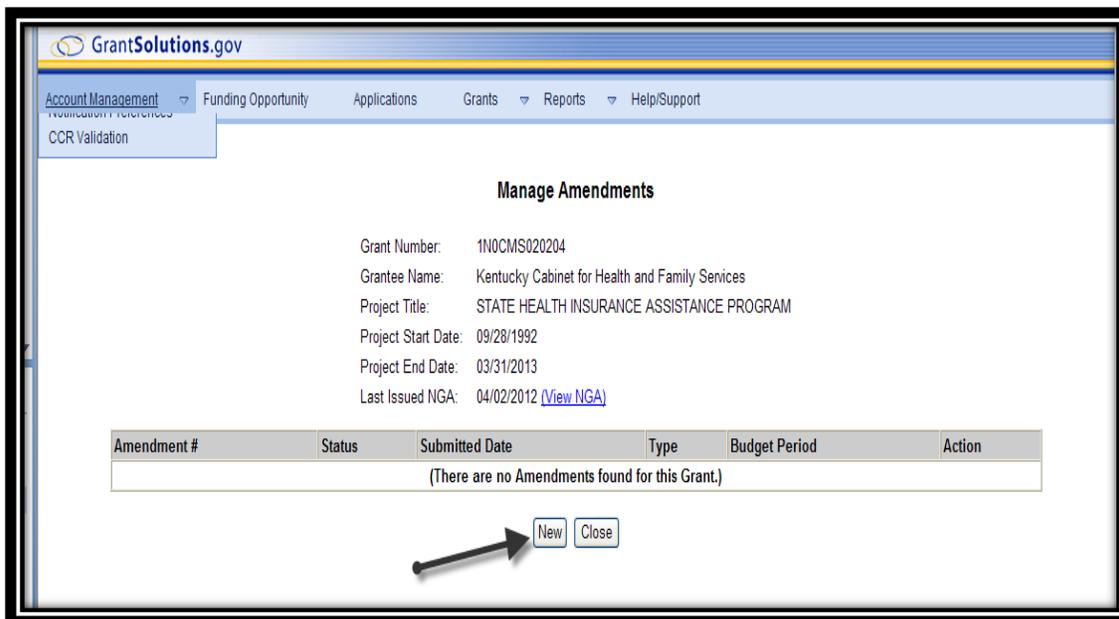


Figure 1-23 Create New Amendment

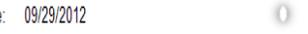
Note: If amendments were previously submitted, a record of each amendment would be visible on this screen, as seen in the below sample image.

[rrouseapp] | GrantSolutions-3.22.4.4 04/18/2012 | [Log Out](#)

GrantSolutions.gov

Account Management ▾ Funding Opportunity Applications Grants ▾ Reports ▾ Online Data Collection Help/Support

Manage Amendments

Grant Number: 
 Grantee Name: 
 Project Title: 
 Project Start Date: 09/30/2007
 Project End Date: 09/29/2012
 Last Issued NGA: 08/11/2010 ([View NGA](#))

Amendment History for selected Grant

| Amendment # | Status | Submitted Date | Type | Budget Period | Action |
|---|------------------------|------------------------|----------------------|------------------------------|--|
| 1L02012000031  | Submitted (Post Award) | 04/23/2012 11:09:47 AM | Revision (Carryover) | 1 09/30/2007 - 09/29/2012 | View Amendment Grant Notes History Send Message |

Figure 1-24 Amendment History

After selecting New, the Amendment Type screen will appear. This is an important step as it determines the appropriate application kit required by the sponsoring agency. Each application type represents a preconfigured kit developed for a specific post amendment action. These post amendment actions could range from a simple address change to a more complex scope and budget revision. **If the user is not sure about the appropriate application kit, the Grantee should contact their appropriate Program or Grants office for proper instructions.**

1. The Select Amendment Type screen will appear. Click on the radio button for the amendment type you are creating. *In this example we are selecting the Revision Carryover as the appropriate amendment type.*
2. Click the **CREATE AMENDMENT** button at the bottom of the screen

GrantSolutions.gov

Account Management ▾ Funding Opportunity Applications Grants ▾ Reports ▾ Help/Support

Select Amendment Type

Grant Number: 1N0CMS020204-14
Project Period: 09/28/1992 to 03/31/2013
Budget Period: 04/01/2006 to 03/31/2007

Amendment Type

- Extension (Type 4)
- Extension and Revision (Type 4)
- Grant Closeout (Type 6)
- Revision (Budget) (Type 6)
- Revision (Carryover) (Type 6)
- Revision (Change of Address) (Type 6)
- Revision (Change of PI/PI) (Type 6)
- Revision (EIN) (Type 6)
- Supplement (Type 3)
- Supplement and Extension (Type 3)
- Supplement and Revision (Type 3)

Figure 1-25 Select Amendment Type

3. Upon the selection of the Create Amendment Link, the system will generate the applicable GrantSolutions Application Amendment Control Checklist (GAACC) for the specific application type selected.

The GAACC is a universal file cabinet or depository which is accessible to all authorized users. This page not only provides a summary checklist of all required and accessory information; it further provides real time information and application status.

The amendment kit will contain both required and optional forms for successful completion of the specific amendment type. Depending on the Amendment Type the contents of the GAACC can vary according to program policy or ongoing changes. As a grantee or applicant, application control checklist is where you will complete all on line forms, download and upload documents and instructions, and submit the final amendment application.

Once an applicant has fully completed the GAACC, The appropriate Federal Staff will be able to electronically access this checklist and review the entire or individual components of the application kit as required.

- To begin entering or uploading the requested data into each section, select the **Upload, Enter Online, or Enter Comments** links (i.e., online forms, program narrative, etc.).

GrantSolutions Amendment Application Control Checklist

Post Award Action: Revision (Carryover)

Work In Progress (Post Award)

This is your GrantSolutions Application Control Checklist (GAACC). You will use the GAACC to track the status of your application.

To complete your application electronically, enter information by using the online forms and/or adding attachments (upload/mail-in). Required items are noted by the exclamation point (page). If an enclosure has not been verified, a red 'X' (page) is displayed.

Print Application: [Original Submission](#)

Applicant: Kentucky Cabinet for Health and Family Services
 Grant Number: 1NOCMS020204
 Application Number: (To be assigned)
 Action: Revision (Carryover)
 Project Title: STATE HEALTH INSURANCE ASSISTANCE PROGRAM

| Online Forms | | |
|--|--|--|
| SF-424A Budget Information - Non-Construction Programs | Enter Online Enter Comments | Attachment(s) 0 Uploaded Files 0 Mail-in Items |
| Program Narrative | | |
| Budget Narrative | Enter Comments | Attachment(s) 0 Uploaded Files 0 Mail-in Items |
| Additional Information to be Submitted | | |
| Recipient Request Letter | Enter Comments | Attachment(s) 0 Uploaded Files 0 Mail-in Items |
| Financial Status Report (Upload) | Enter Comments | Attachment(s) 0 Uploaded Files 0 Mail-in Items |
| Miscellaneous Information | Enter Comments | Attachment(s) 0 Uploaded Files 0 Mail-in Items |

Amendment Package Status: Work In Progress (Post Award)

Submission Notice

Figure 1-26 Data Entry on the GAACC

Instructions for completing on-line forms are available by clicking the link at the top of each form. Certain online forms such as the SF-424 V2 and the SF-424 A will have a new error checking mechanism to assist the user in entering data. If the user enters a required value incorrectly, the system will provide additional error prompting for proper completion. An example of this real time error checking is illustrated below.

Section A Budget Summary

| Grant Program Function or Activity (a) | Catalog of Federal Domestic Assistance Number (b) | Estimated Unobligated Funds | | New or Revised Budget | | Total (g) |
|--|---|-----------------------------|-----------------|-----------------------|-----------------|--------------|
| | | Federal (c) | Non Federal (d) | Federal (e) | Non Federal (f) | |
| 1. Grant Languages Program (NL) | 93.582 - Mitigation of Environn | \$ 0.00 | \$ 0.00 | \$ 100000.00 | \$ 0.00 | \$100,000.00 |
| 2. Grant Languages Program (NL) | Please select | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$0.00 |
| 3. Grant Languages Program (NL) | Plea | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$0.00 |
| 4. Grant Languages Program (NL) | Plea | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$0.00 |
| 5. TOTALS (sum of lines 1-4) | | \$0.00 | \$0.00 | \$100,000.00 | \$0.00 | \$100,000.00 |

Section B Budget Categories

6. Object Class Categories

| | GRANT PROGRAM, FUNCTION OR ACTIVITY | | | | Total (5) |
|---------------------|-------------------------------------|----------------------------------|----------------------------------|----------------------------------|-----------|
| | (1) Grant Languages Program (NL) | (2) Grant Languages Program (NL) | (3) Grant Languages Program (NL) | (4) Grant Languages Program (NL) | |
| (a) Personnel | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$0.00 |
| (b) Fringe Benefits | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$0.00 |
| (c) Travel | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$0.00 |
| (d) Equipment | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$0.00 |
| (e) Supplies | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$0.00 |

New Error Checking on SF 424A.
Error icons are visible when required totals do not match. Example below: 5e not equals 6(f).

Figure 1-27 Error checking on the new SF424A online form

- After completing the specific on line form, scroll to the bottom for options to **SAVE, SHOW ERRORS, OR CLOSE**.
- Select **“SAVE”** and the page will update & return, then select **“Close”**.

After saving a form or uploading a file, the system will return to the default Amendment checklist page. At this point the system will clearly inform the user of any data entry problems by way of messages illustrated below:

| Online Forms | | | |
|---|---|--|---|
| SF-424 Application for Federal Assistance (Version 2.0) | Enter Online Print Completed Enter Comments | Attachment(s)  0 Uploaded Files 0 Mail-in Items | ✓ |
| SF-424A Budget Information - Non-Construction Programs | Enter Online Print Completed Enter Comments | Attachment(s)  0 Uploaded Files 0 Mail-in Items | ✓ |
| Program Narrative | | | |
| Budget Narrative | Enter Comments | Attachment(s)  0 Uploaded Files 0 Mail-in Items | ⚠ |
| Additional Information to be Submitted | | | |
| Miscellaneous Information | Enter Comments | Attachment(s)  0 Uploaded Files 0 Mail-in Items | ⚠ |

Figure 1-28 GAACC with incomplete entries



A green check mark indicates a form/selection was completed successfully



A red x marks means the data/form use not entered or uploaded successfully. This would indicate an error in the application and will require additional attention.



A red triangle is a warning that data has not been entered or uploaded. This warning suggests that the data in the specific section is incomplete.

- Continue entering data in each section until all required forms are completed

Helpful Hints:

- Have a specific question about a required form with your amendment application? Consult with your Grant Official, as in some instances, completing a form/section may not be required.
- For assistance with “*how to*” upload a document to your application or other system technical issues, please contact the COE Support Center.

Uploading Attachments

In many instances the appropriate Grant’s office will require additional forms, narratives and miscellaneous information. The GAACC has been designed to easily accommodate the uploading of critical attachments to the GrantSolutions file cabinet.

Menu Navigation

1. On the Amendment Application Control Checklist, click the **UPLOAD ATTACHMENT** link. The Attachments screen will appear.

Attachments

You may upload file attachments or specify mail-in items for the enclosure below:

Organization Name: NATIONAL HISPANIC MEDICAL ASSOCIATION
Application Number: (To be assigned)
Project Title: Hispanic Physicians' Leadership Development Initiative
Project Period: 09/01/2009 to 08/31/2014

Enclosure: Budget Narrative
Number of Attachments: 0

| Item Description | Type | Review | Action |
|------------------|------|--------|--------|
| (Empty) | | | |

Attachment Notice:
This is a Test message to verify that this pages loads correctly. 😊

Figure 1-29 Upload Attachment

2. Enter a description of the document, followed by checking **BROWSE** to search and select a file to upload from your local computer's document library.

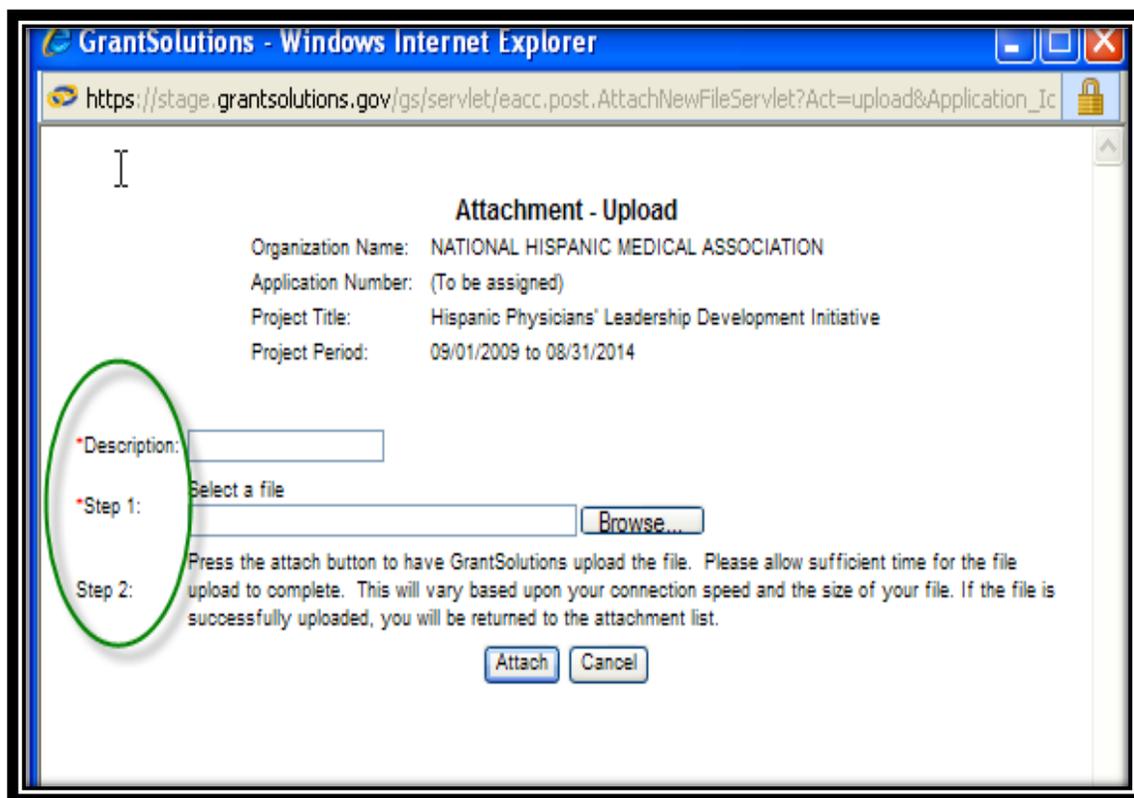


Figure 1-30 Browse and Title Attachment

Helpful Hint:

- It is recommended you upload files from your local computer rather than from an external network or web site so as to avoid upload delays or errors.
3. Click the **ATTACH LINK**. System will return to Amendment list.
 4. Repeat steps to upload more attachments. Or, select **CLOSE** and return to the GAACC Default Screen.

Attachments

You may upload file attachments or specify mail-in items for the enclosure below:

Organization Name: NATIONAL HISPANIC MEDICAL ASSOCIATION
 Application Number: (To be assigned)
 Project Title: Hispanic Physicians' Leadership Development Initiative
 Project Period: 09/01/2009 to 08/31/2014

Enclosure: Budget Narrative
 Number of Attachments: 1

| Item Description | Type | Review | Action |
|------------------|--------|---------|------------------------|
| Budg Rev | Upload | Pending | Remove |

Attachment Notice:

This is a Test message to verify that this pages loads correctly. 😊

Figure 1-31 Close Attachment and return to GAACC

Verification and Completion

When all required sections of the GAACC have been completed successfully, the Grantee will need to perform verification and final submission for the processed amendment. This is a two step process and may require another user other than the one who created the amendment.

Note: The authority to complete the submission process will depend on a Users' role in GrantSolutions; and who was granted the appropriate Authorizing Official status by the program or grants office. If not sure please confirm with your respective program official.

Menu Navigation

1. Scroll to bottom of the Amendment Application Control Checklist page and select the **VERIFY SUBMISSION** button.

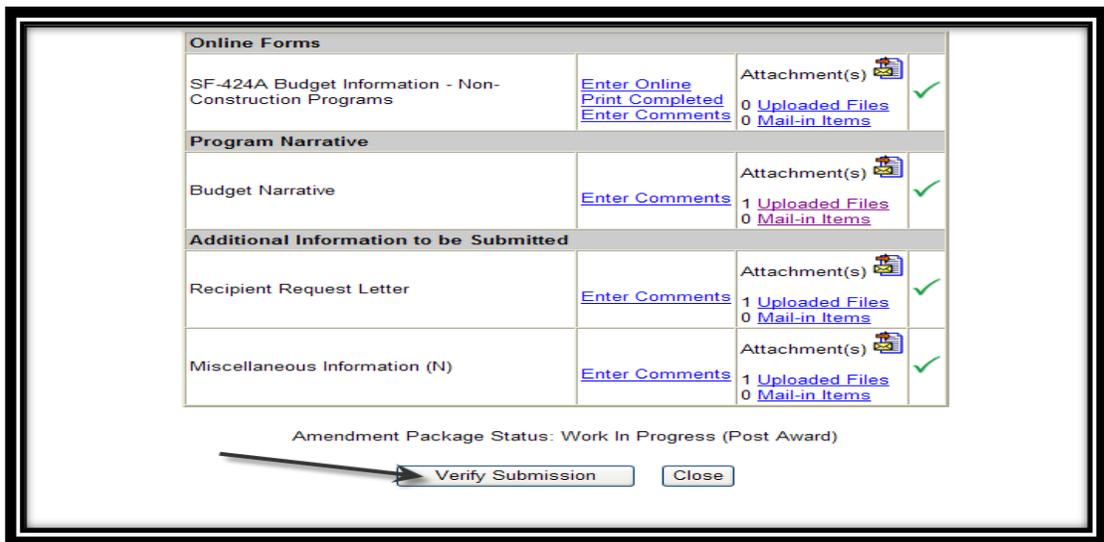


Figure 1-32 Verify Submission

2. The Amendment Submission Verification page will appear. Select the **FINAL SUBMISSION** button; and then confirm the final verification warning by selecting **OK**.

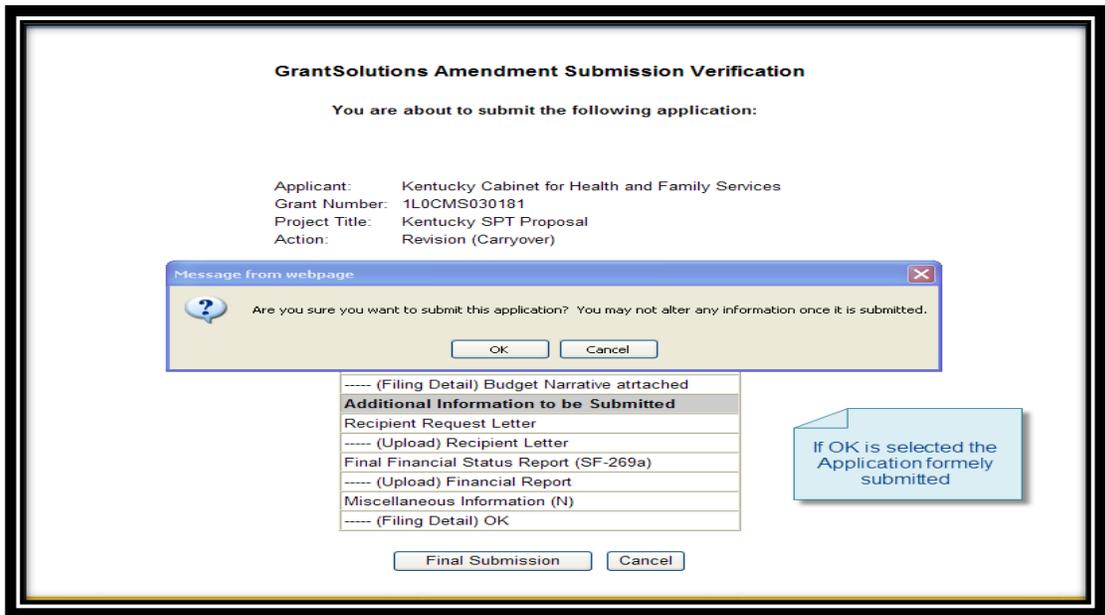


Figure 1-33 Final submission and confirmation

Note: Once the appropriate Grantee executes the OK link, the amendment application becomes an official legal application. At this point the application cannot be edited, withdrawn or corrected. Should you need to make changes select CANCEL to return to the edit mode?

3. The system will return to the Amendment Status Confirmation page.
4. After reviewing the confirmation screen re select the **APPLICATION CONTROL CHECKLIST** button and select Close at the bottom of the GACC to complete the application process.

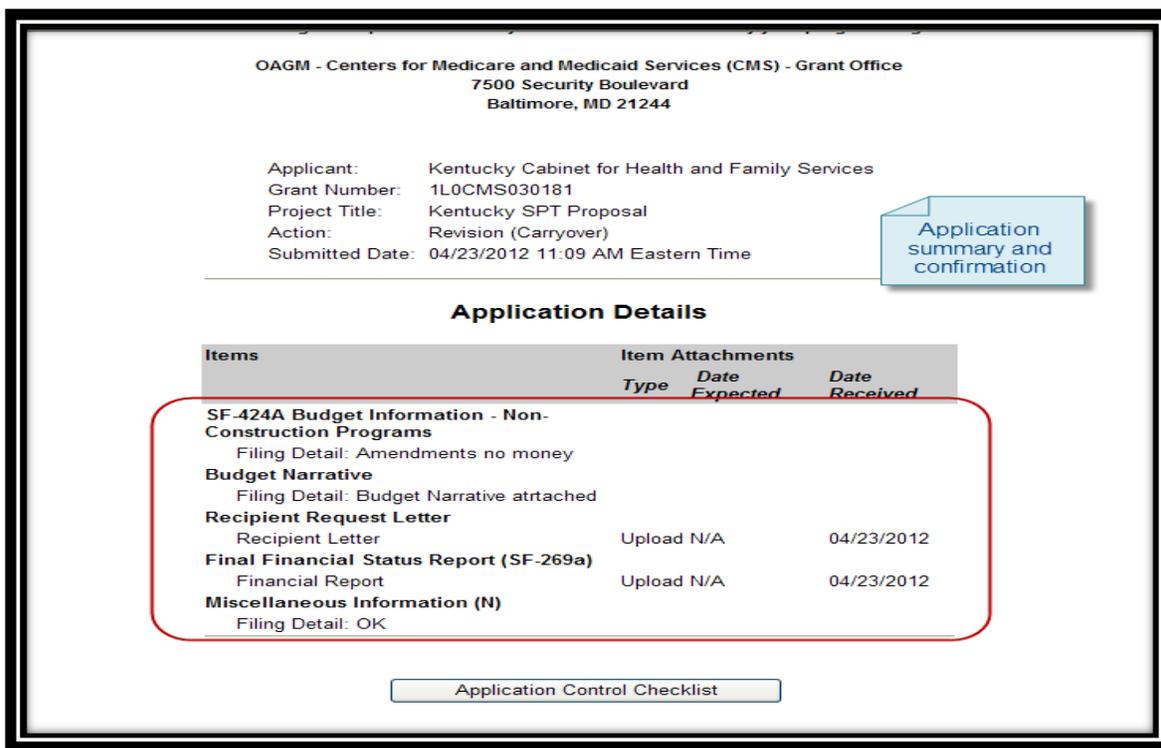


Figure 1-34 Confirmation Page

Amendment Review and Printing

1. From the **MY GRANTS LIST** screen, select **MANAGE AMENDMENTS** link to view the status/history of amendment applications.

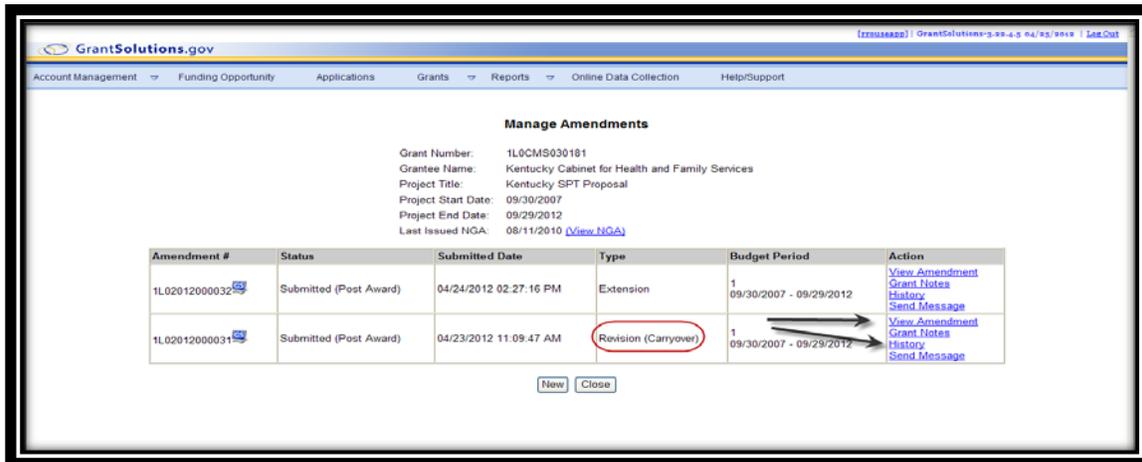


Figure 1-35 Amendment History Link

2. Reopen the GACC and select the Original Submission link to generate a PDF copy of the application and with print capability.



Figure 1-36 View and Print Application

Helpful Hint: You can review or print the amendment application and see the status of the amendment submission from the Control Checklist or Manage Amendment screen.

Training and Support

The COE Partner Education Services provides Training and Mentoring with and ongoing Help Desk Support for GrantSolutions. Support team personnel are available at (help@grantsolutions.gov) Monday through Friday 8 a.m. to 6 p.m. EST to assist in support issues.

COE provides formal, hands GrantSolutions Suite training on a periodic basis. Students are encouraged to participate and inquire of scheduled classes and registration via the help desk contact above.

COE further provides specialized functional training such as budget worksheet and other new features depending upon product development cycles. In addition, the group provides specific partner training negotiated through the Education Group. Information on either of these training opportunities can be accessed via the help line above

NOTES



*The Grants Center
of Excellence*

Contact us:

www.grantsolutions.gov

1.866.577.0771

202.401.5282