

Filling out the GrantSolutions Grantee User Account Request Form

Thank you for taking the time to set up your GrantSolutions user account. This instruction sheet will help you fill it out completely and correctly, minimizing the processing time and getting you into GrantSolutions as quickly as possible. Please ignore page 1 of the form, as some instructions are incorrect for IHS.

Each user who will be working with your grant in GrantSolutions will need their own account, so each will have to fill out a copy of the form. The user will have to fill out most of page 2, then print/type their name and the date, and sign page 3.

Page 2 has several questions and options that should be filled in a certain way, which we outline here.

Request Type

- Unless you already have a GrantSolutions account, the Request Type is “New Account.”
- If you have an account, but it needs to be updated or corrected, select “Account Change.”
- If a user leaves your organization, or does not need to access GrantSolutions anymore, click “Account Closure.”
- For Account Changes or Closures, please write the login (username) on the form.
- For Account Changes or Closures, page 3 does not need to be submitted. This is only needed for new accounts.

Partner Agency

- Please select “Department of Health and Human Services” and leave all other selections and boxes for this question blank.

Role Authority

This is where you indicate what access the user will need.

- Authorizing Official gives the user complete access to all data and Grantee functions within GrantSolutions. It is recommended that only one person have this role for your organization.
 - **** Authorizing Official in GrantSolutions is NOT the same as a Grants.gov AOR ****
- Program Director/Principal Investigator gives the user the ability to start an application or amendment, fill it out completely, and submit it.
- Support Staff gives the user access to all Notes and other documents for all grants the organization has been awarded. It also allows the user to work on applications, but not start or submit them.
- Financial Officer gives the user access to all financial data and the ability to submit financial reports through GrantSolutions (this function is not currently configured for IHS in GrantSolutions).

- Financial Officer Support lets the user work with Financial Reports, but not submit them.
- Reporting Only is a role we don't use at this time.

Organization Name – The name of the organization, preferably how it appears on the Notice of Grant Award.

Address 1, Address 2, City, State, Zip – This is the address information for the main location of your organization.

Grant Number(s) – This is the list of grant numbers you want the user to be able to access. If we don't have this on the form, the user won't be assigned to the grant and may not be able to work with it. This also helps the technician be sure the account is linked to the correct organization.

First Name, Last Name, Title – This is the user who will be using the account. Each user should have their own account (sharing of accounts is not permitted).

Phone, Fax – This is not required, but we request that they be provided. They will be entered into the user's record in GrantSolutions, and will be available to Grants staff. This helps us have correct contact information.

Email Address – This is the e-mail address of the user, is **absolutely essential** and is required. Notifications sent by the system, including the user's login and password, will go to this e-mail account. The user will not receive these if the e-mail address is incorrect or belongs to someone else.

Person Address 1, 2, City, State, Zip – This is the address where the user works, if it is different than the main location. If the user works in the main location, these fields can be left blank.

Authorized Official Name, Title, Signature – These should be filled in by the person at your organization who has authority to grant permission to your grant data. It is helpful if it is someone we can easily verify, but does not need to be the tribal chairman. It is **very** helpful if this person has a user account in GrantSolutions, and is assigned the Authorized Official role – this makes verification very quick.

Page 3 shows guidelines and rules the user must agree to follow in order to receive an account in GrantSolutions. The user should read them, then fill out the name, signature and date on page 3.

All signatures should be actual signatures. Forms with signatures typed into the spaces will be returned.

Once the form has been filled out, please send it to the IHS Division of Grants Management. You can scan the form and e-mail it to Paul.Gettys@ihs.gov, GrantsPolicy@ihs.gov. Having recently moved, our office does not currently have a fax machine.