GrantSolutions Grants Management Module
Grantee User Guide

April 2020

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Introduction

GRANTSOLUTIONS

GrantSolutions 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 GrantSolutions Grants Management Module (GMM) is a role-based comprehensive grants management system.

GRANTSOLUTIONS GMM

The GrantSolutions GMM is a web based system that provides a way for grant recipients to view/print their grant awards, submit post-award actions such as amendments, apply for non-competing continuations, directed supplements, submit reports, etc. Please contact the awarding agency for direction on the types of actions to perform in the system.

THE GRANTSOLUTIONS PUBLIC WEBSITE

To access the GrantSolutions GMM, connect to the Internet, open a web browser such as Internet Explorer, Chrome, or Mozilla Firefox, and go to http://www.grantsolutions.gov.

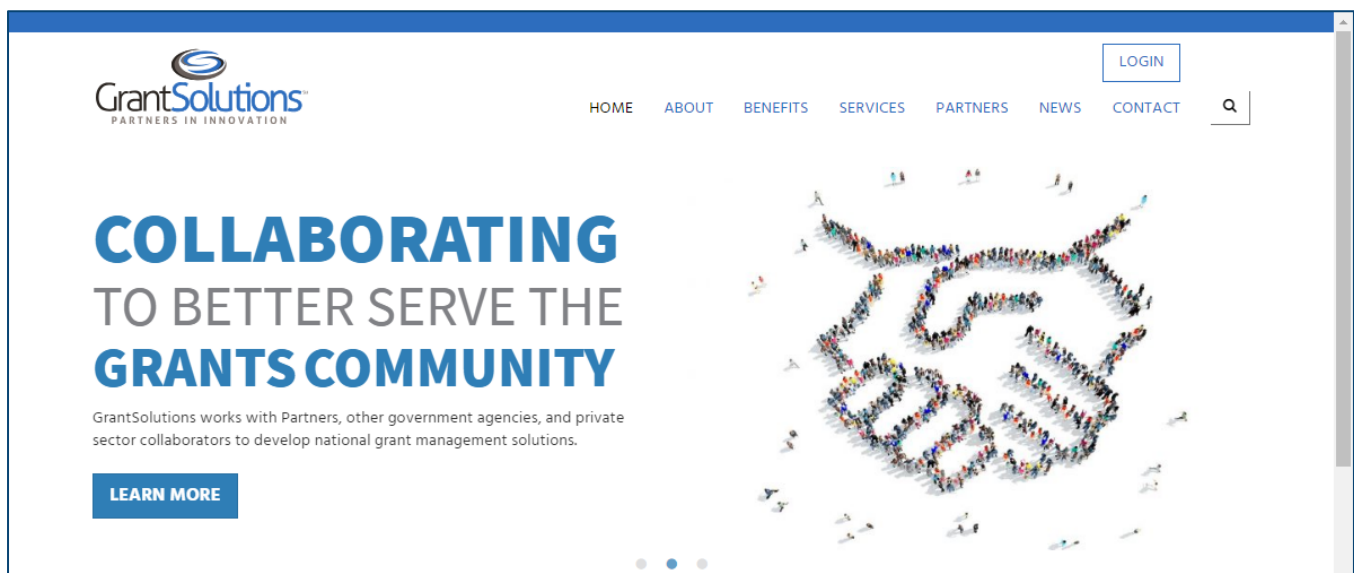The GrantSolutions public website appears.

Figure 1: GrantSolutions public website

This website contains useful information, including:

- Login button to GrantSolutions
- Help Desk contact information and hours
- Frequently Asked Questions
- GrantSolutions Grantee training videos
- User Account Request Forms

Getting Started – Request a User Account Form

The *Grantee User Account Request Form* must be completed and submitted for each user requiring a new GrantSolutions GMM account. Forms are also submitted for account changes, and to delete access to the system.

To access a copy of the form from the GrantSolutions website:

1. Scroll to the middle of the "Home" page (www.grantsolutions.gov) and click the link **Request a User Account**.
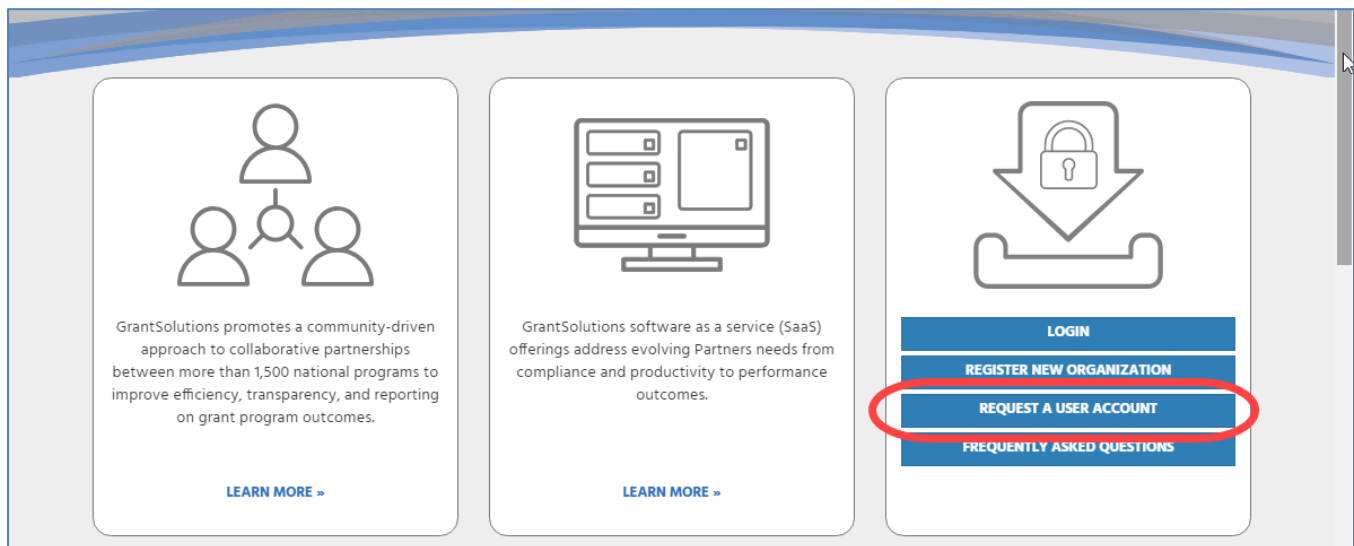

Figure 2: GrantSolutions Public Home Page– Request a User Account link

2. The "Getting Started – Request a User Account" screen displays. Under the heading *Recipient User*, click the link **Recipient User Account Request Form**.
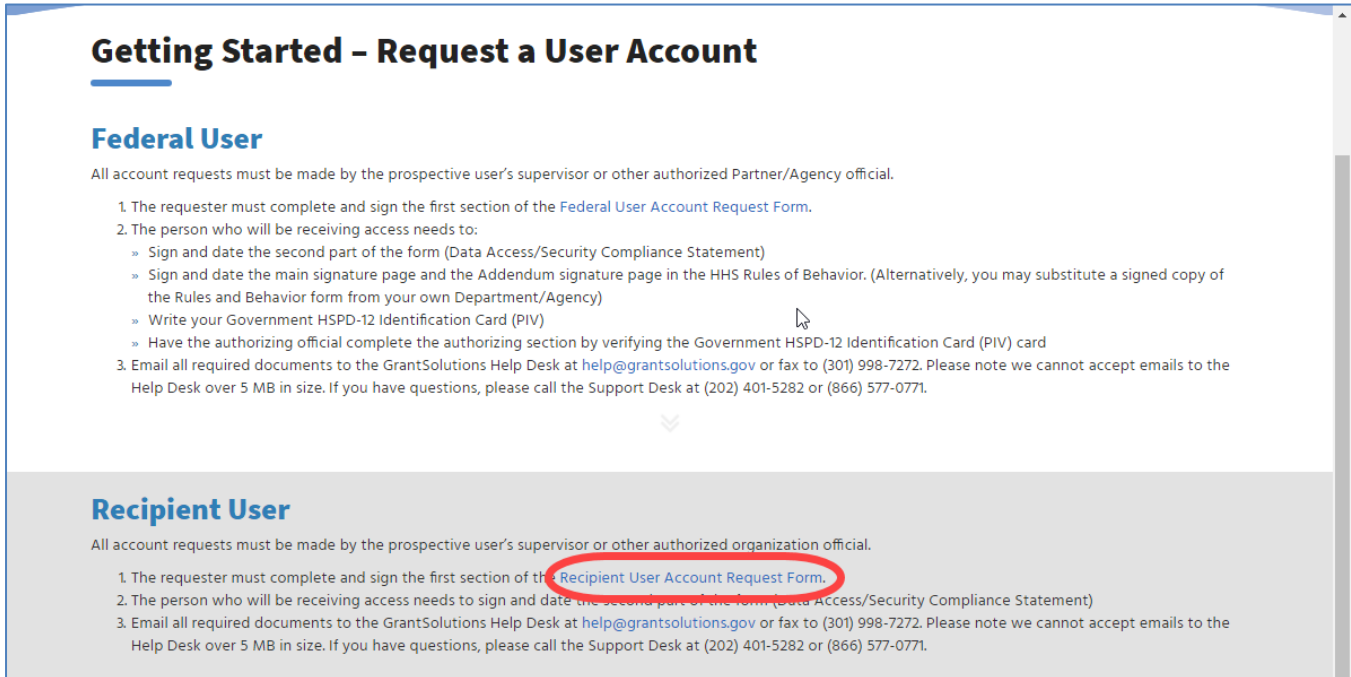

Getting Started – Request a User Account

Federal User

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 Federal User Account Request Form.
2. The person who will be receiving access needs to:
   » Sign and date the second part of the form (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)
   » Write your Government HSPD-12 Identification Card (PIV)
   » Have the authorizing official complete the authorizing section by verifying the Government HSPD-12 Identification Card (PIV) card
3. Email all required documents to the GrantSolutions Help Desk at help@grantsolutions.gov or fax to (301) 998-7272. Please note we cannot accept emails to the Help Desk over 5 MB in size. If you have questions, please call the Support Desk at (202) 401-5282 or (866) 577-0771.

Recipient User

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 Recipient User Account Request Form.
2. The person who will be receiving access needs to sign and date the second part of the form (Data Access/Security Compliance Statement)
3. Email all required documents to the GrantSolutions Help Desk at help@grantsolutions.gov or fax to (301) 998-7272. Please note we cannot accept emails to the Help Desk over 5 MB in size. If you have questions, please call the Support Desk at (202) 401-5282 or (866) 577-0771.

Figure 3: Getting Started – Request a User Account screen

3. Follow the instructions to complete and submit the form and adhere to any guidance provided by the awarding agency.

Please note that the GrantSolutions Help Desk cannot accept emails over 5 MB in size.

Once an account is created, the user receives two automatically generated emails from GrantSolutions. The first email contains a username and a link to GrantSolutions.gov. The second email contains a temporary password.

Tip: Usernames are NOT case sensitive. Password ARE case sensitive.

GrantSolutions Roles

GMM is a role-based system, which means users may only perform actions to which they have been given permission. By default, all Grantee roles can electronically submit applications by default. However, Grantors can restrict Grantee roles from submitting applications based on their grants policy.

The available Grantee roles are as follows:

Role	Actions
Grantee Administrative Official (ADO)	The Grantee Administrative Official (ADO) is responsible for the oversight of activities performed by the Grantee Security Monitor. • Accepts award on behalf of organization • Submit Applications/Amendments • Submit Federal Financial Reports • View Awards
Principal Investigator/Program Director (PI/PD)	The Principal Investigator/Program Director (PI/PD) is responsible for the oversight of activities performed by the Grantee Support Staff. • Submit Applications/Amendments • Submit Federal Financial Reports (FFR) • View Awards
Grantee Support Staff (GSS)	The Grantee Support Staff's role is to assist the Principal Investigator or Program Director in the Grantee organization. • View and submit Applications/Amendments • Enter FFR information but cannot submit • View Awards
Grantee Financial Official (FO)	The Grantee Financial Official (FO) is responsible for the oversight of activities performed by the Grantee Financial Support Staff. • Submit Applications/Amendments • Submit Federal Financial Reports • View Awards
Grantee Financial Support Staff (FSS)	The Grantee Financial Support Staff (FSS) role is to assist the Grantee Financial Official in the Grantee organization. • View and submit Applications/Amendments • Enter FFR information but cannot submit • View Awards

GrantSolutions Help Desk

The GrantSolutions Help Desk is available to assist Grantees with technical questions about the system.

Email: help@grantsolutions.gov
Phone: 202-401-5282 or 866-577-0771
Hours: Monday through Friday 7 a.m. to 8 p.m. ET excluding Federal holidays

Locate Help Desk contact information in a variety of ways:

- From the GrantSolutions "Contact" page
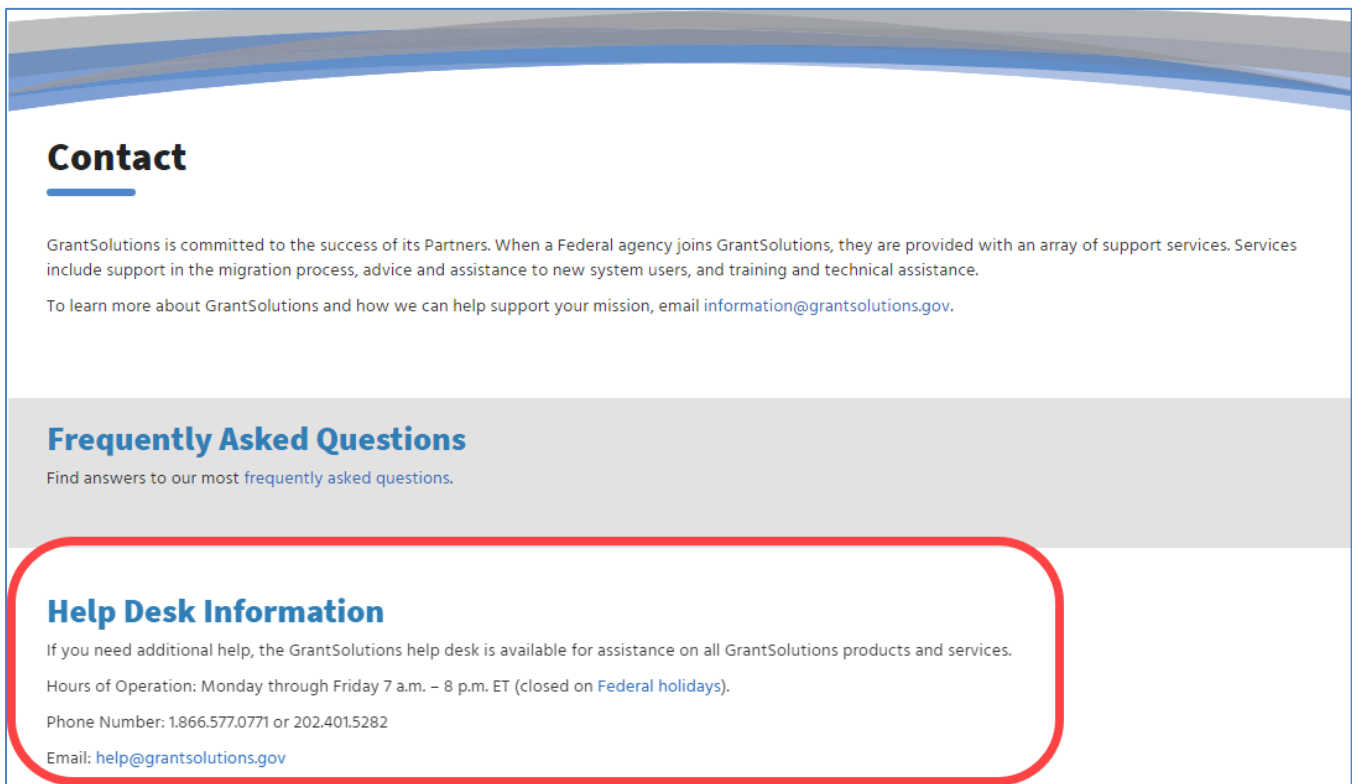
Figure 4: GrantSolutions Contact page – Help Desk Information

- At the bottom of every page when logged into the GrantSolutions GMM
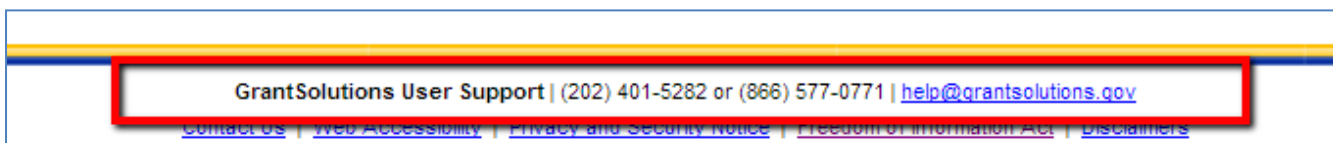
Figure 5: My Grants List screen - Footer

Frequently Asked Questions

The Frequently Asked Questions page was created in response to inquiries on support, services, training, and the GrantSolutions GMM.
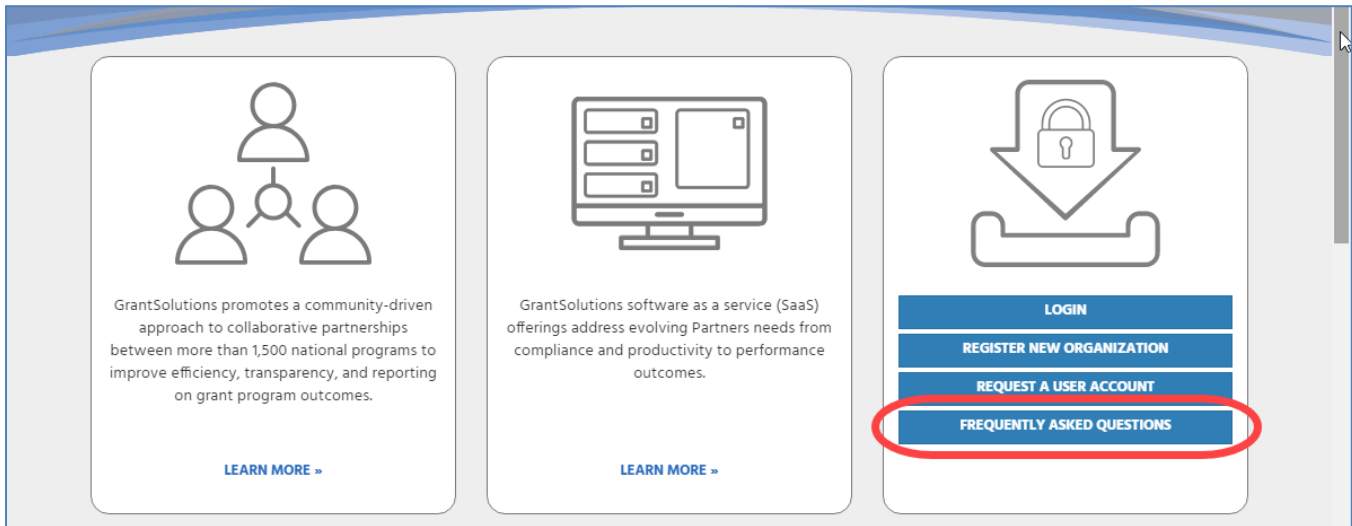
Figure 6: Home page - Frequently Asked Questions link

Search for questions and answers.
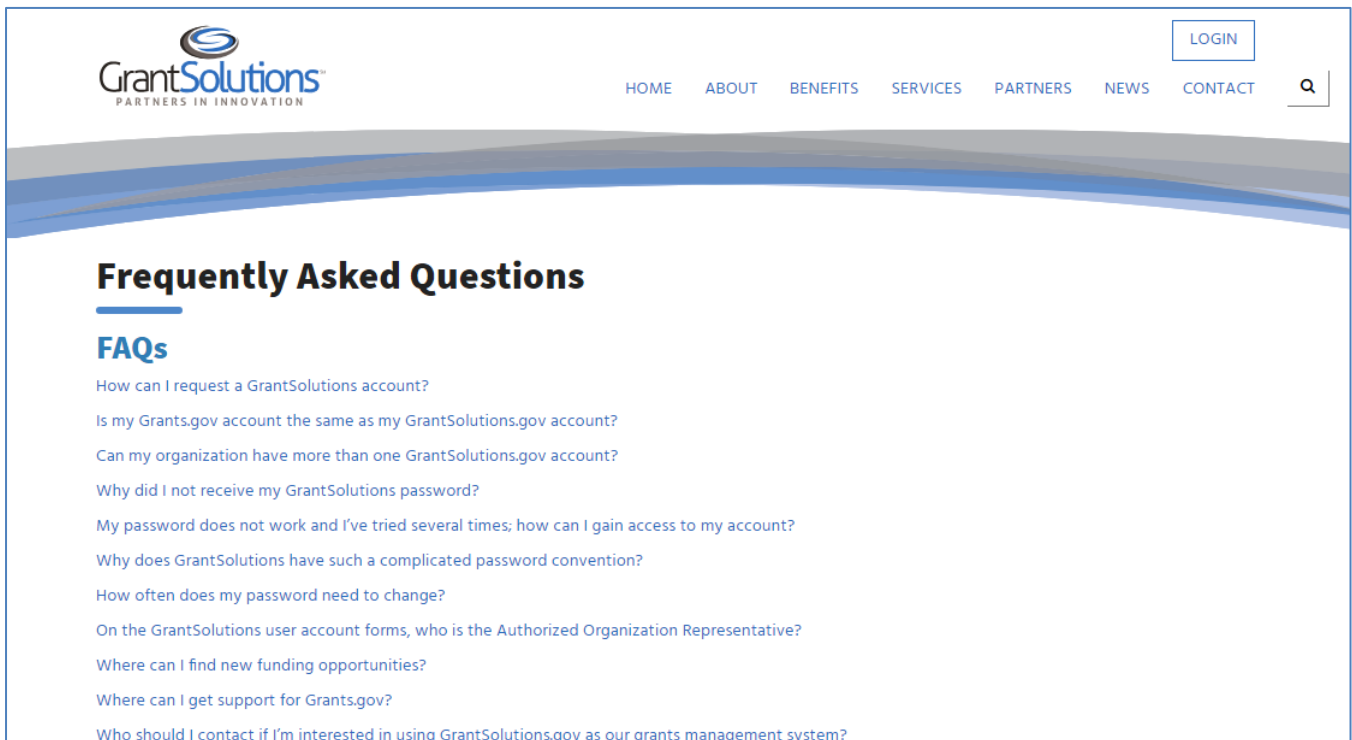
Figure 7: Frequently Asked Questions page

Grantee Training Videos

A series of three Grantee training videos is available from the GrantSolutions public site. View the training sessions anytime as a quick start to GrantSolutions or as a refresher.

To access the videos, scroll to the bottom of the public website and click the link **Recipient Training Videos**.
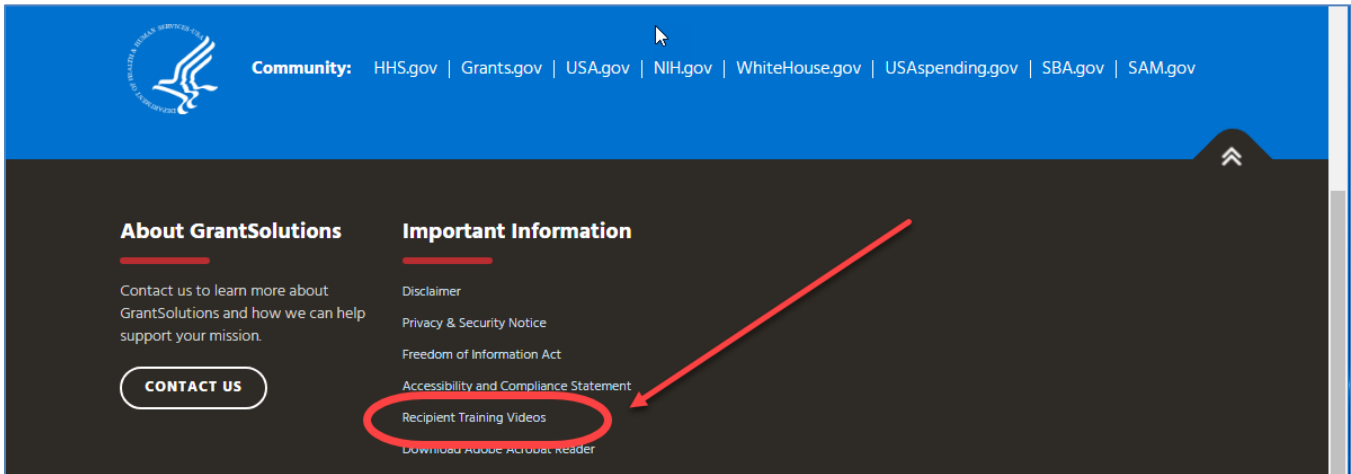
Figure 8: Grantee Training Videos

GrantSolutions Login

To begin working with GrantSolutions, navigate to the login screen.

1. From an Internet browser (such as Internet Explorer), go to www.grantsolutions.gov.

2. The "GrantSolutions" Home page appears. Click the **Login** button.

Figure 9: The GrantSolutions Home page – Login button

3. The "GrantSolutions" login screen displays.
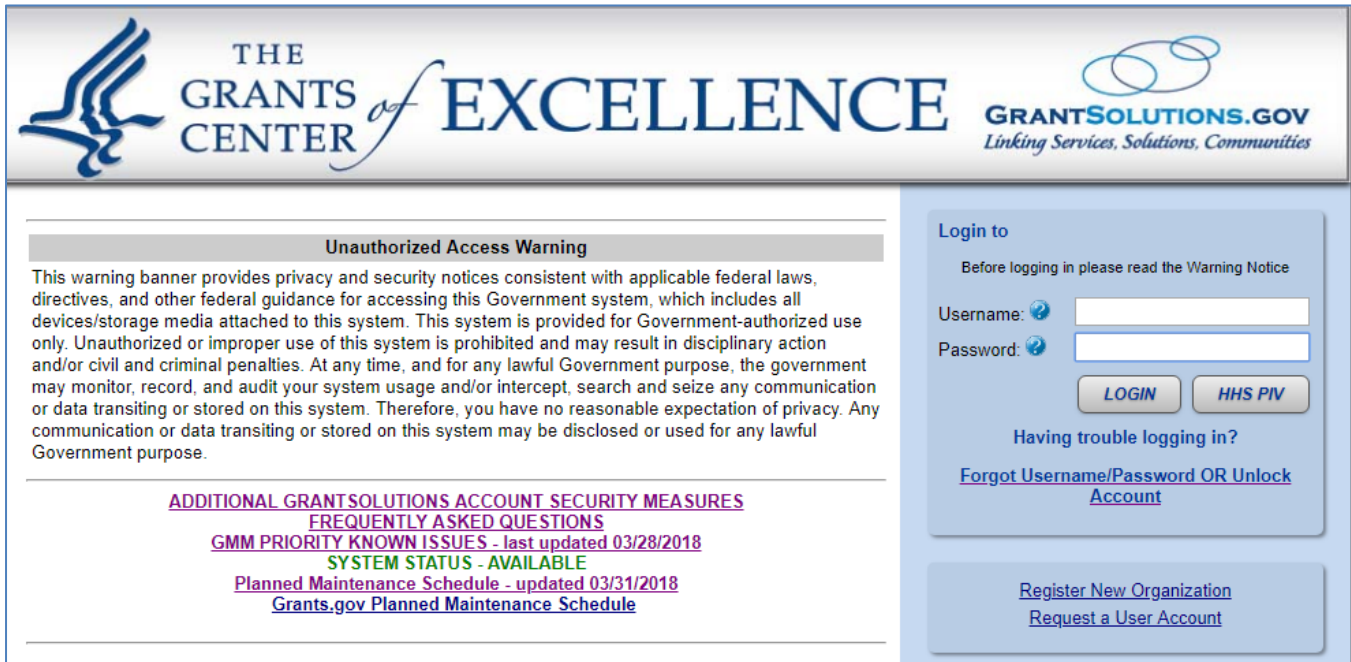
Figure 10: GrantSolutions login screen

GRANTSOLUTIONS LOGIN SCREEN

The GrantSolutions login screen contains useful information, including:

- Planned maintenance schedule

- GMM Priority Known Issues

- Announcements

- Login section

- Forgot Username/Password or Unlock Account link

To log into the GrantSolutions GMM:

1. Enter your username in the **Username** field and the password in the **Password** field.
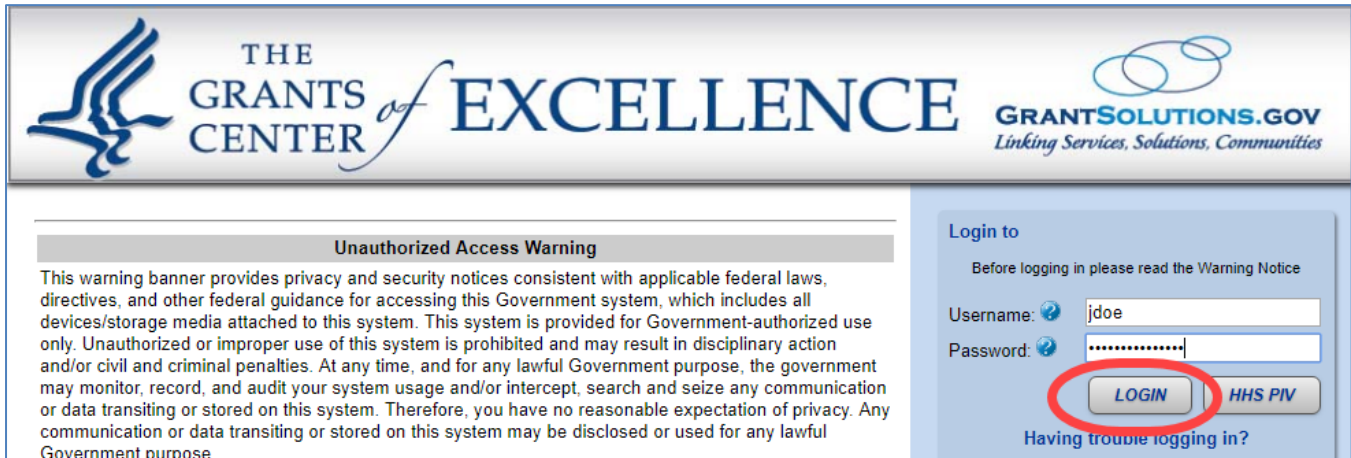
2. Click the **Login** button.

3. The first time a user logs into GrantSolutions, they are presented with the *GrantSolutions Enhanced Security Option* message. Click **Yes** to turn on two-factor authentication or click **No** to continue without enabling the feature.

For more information about two-factor authentication, go to Appendix A, Two-Factor Authentication.
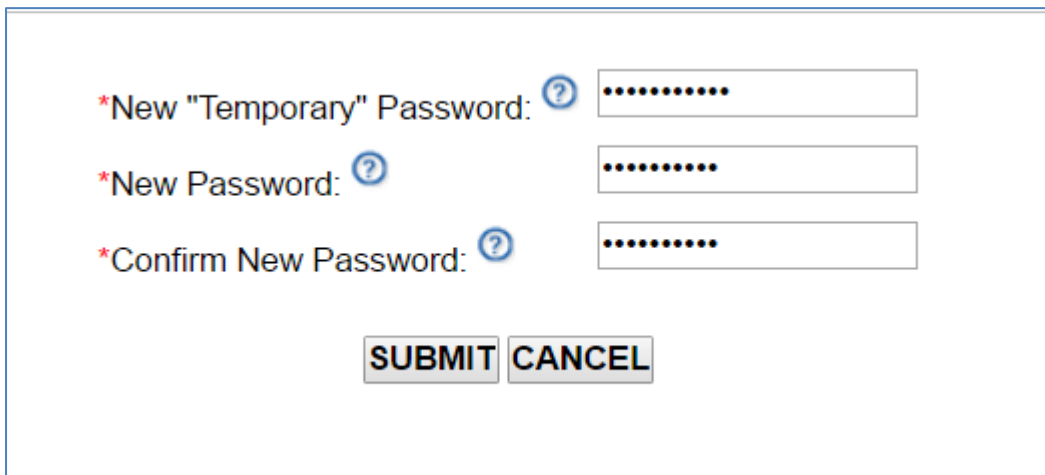
4. Additionally, first time users are required to change their password for security purposes.

Passwords must comply with the following policy requirements:

- The password must contain at least 8 characters

- At least one upper-case, one lower-case, one number, and one special character must be used. Special characters include: @ # $ % & * =? < >

- The password cannot be the same from your last 6 passwords, contain dictionary words, contain common names, contain all or part of your username, contain consecutive character strings (abcdefg, 12345678), contain simple keyboard(qwerty), or use special characters to replace letters to spell a word(P@ssword1)

Passwords remain valid for 60 days and users are prompted to change the password as the expiration date draws near.

5. When the "Change Password" screen appears, enter the **New "Temporary" Password**, a **New Password**, and **Confirm New Password**. Click the **Submit** button.

Figure 12: Change Password screen

6. The GrantSolutions "Login" screen reappears. Enter your **Username** and the newly changed **Password**, and then click the **Login** button.

7. The "My Grants List" screen displays.

PASSWORD/UNLOCK ACCOUNT

When an incorrect user name and password combination is entered, the system generates a login error. Upon three unsuccessful attempts, the account is locked.

To unlock an account, the user may perform one of the following actions:

- Click the **Forgot Username/Password OR Unlock Account** link from the "Login" screen to unlock their account and reset the password

- Contact the GrantSolutions Help Desk for assistance

To retrieve a username, reset a password, and unlock the account:

1. From the GrantSolutions "Login" screen, click the link **Forgot Username/Password OR Unlock Account**.

Figure 15: Forgot Username/Password OR Unlock Account

2. The "Reset or recover your login settings" screen appears.

   To reset the password and unlock the account from the *Forgot Password* section, enter your **Username,** registered **Email Address**, and click the **Reset Password** button.

   *Tip: To retrieve your username, enter the email address on file with GrantSolutions in the Forgot Username section, and click the **Send Usernames** button. Your username is then sent to your email address.*

Figure 16: Reset Password/Unlock Account screen

3. The screen refreshes with a message stating:

A link has been emailed to: (email address) to reset your password and/or unlock your account. If you do not receive an email notification, please check your Spam or Junk email folder.

Figure 17: Password reset message

4. Go to your email system and open the new **GrantSolutions Password Reset** message from noreply@grantsolutions.gov.

   Note: Ensure emails from @grantsolutions.gov are added to your email system's safe list so they do not get blocked or sent to the spam or junk folders.

5. Click the link **Reset Password/Unlock Account**.

   Important! Reset your password within 1 hour of receiving the password reset message, otherwise the link expires.
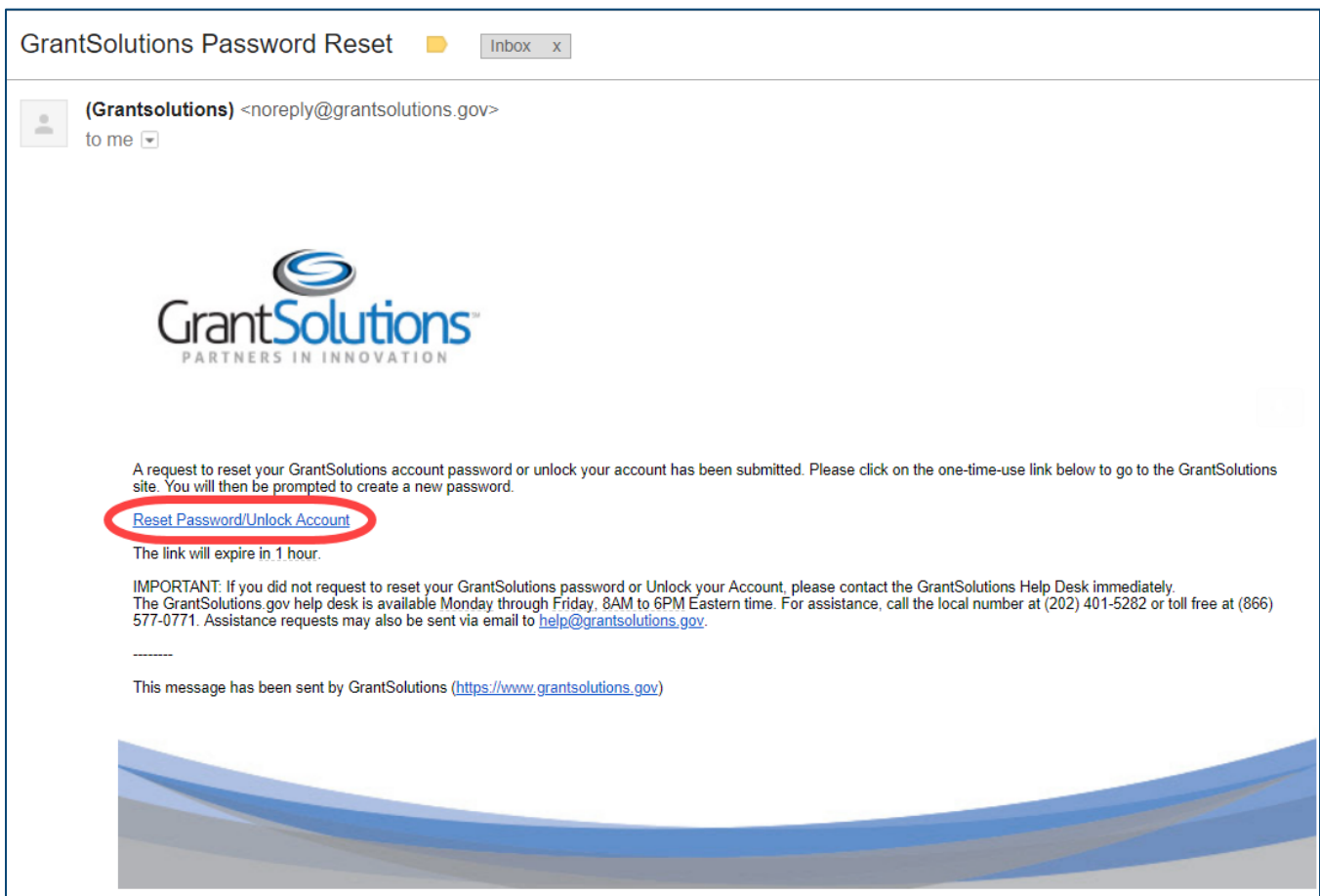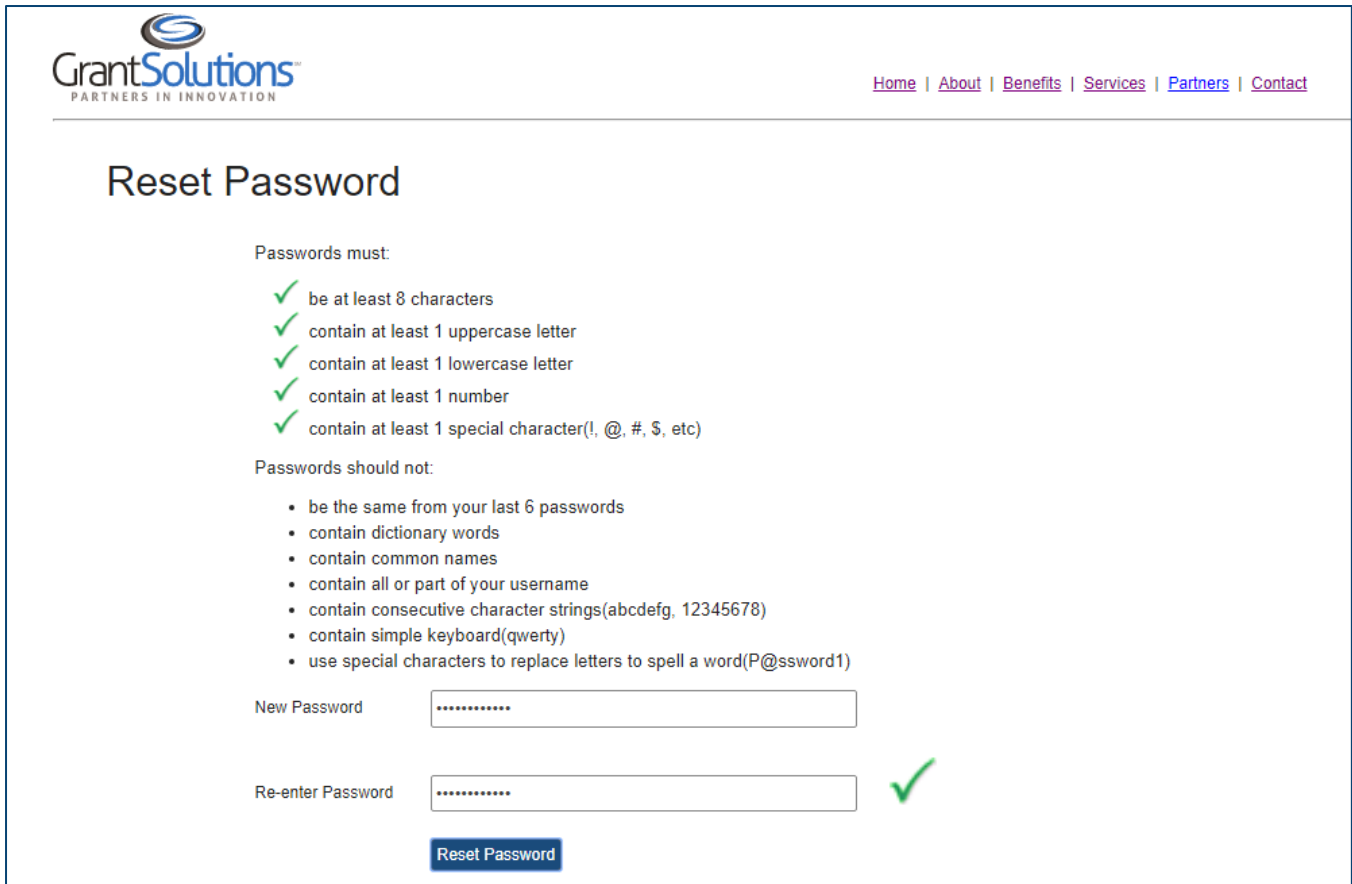
Figure 18: Password reset email message

6. The "Reset Password" screen appears. Enter a **new password**, and then **re-enter the new password**.

7. Click the **Reset Password** button.

Figure 19: Reset Password screen

8. The screen refreshes and the message "Your password has been changed successfully" appears. Click the **Back to Login Screen** link.

Figure 20: Back to Login Screen link

9. The "GrantSolutions Login" screen appears. Enter your **Username**, new **Password**, and click the **Login** button.
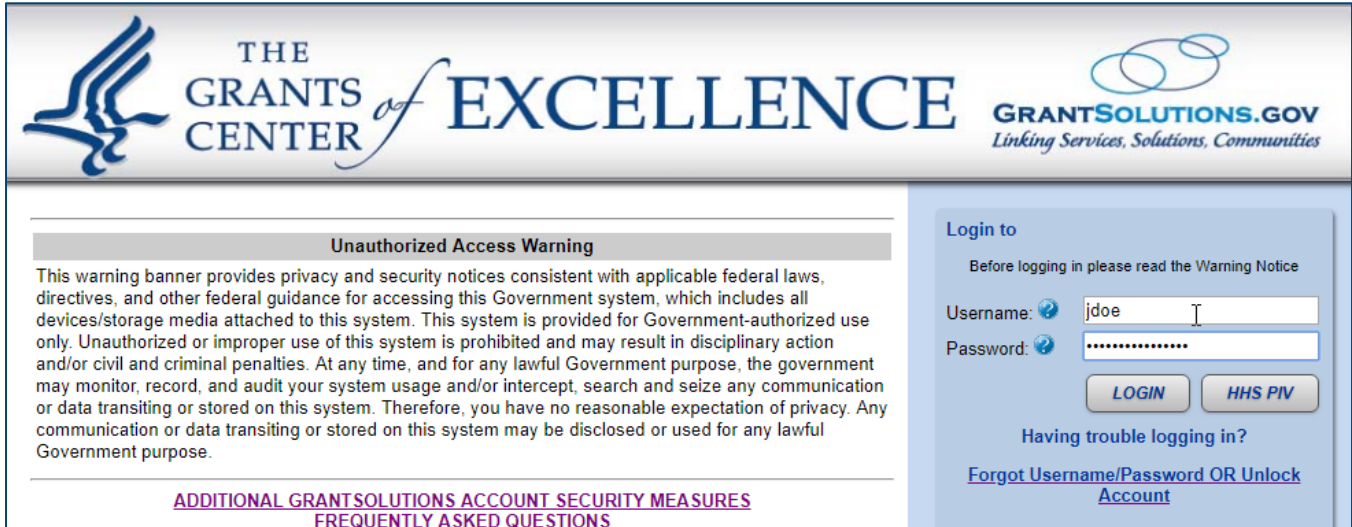
Figure 21: GrantSolutions Login screen

10. The "My Grants List" screen appears.
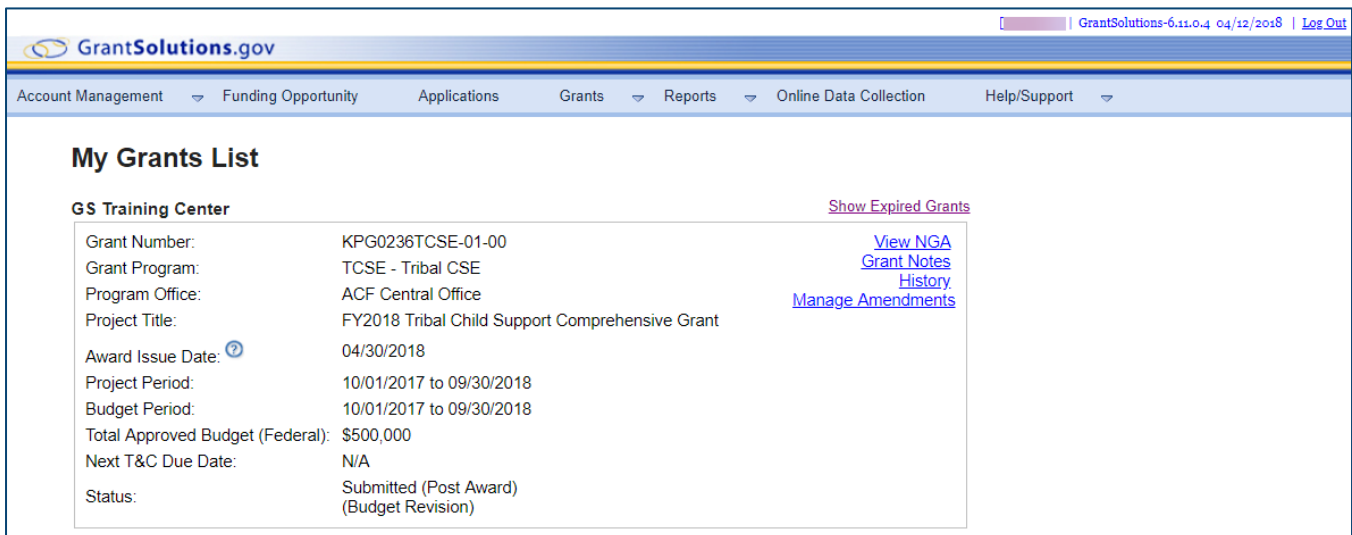
Figure 22: My Grants List screen

Password Expiration

Passwords expire every 60 days. When the time gets close to change a password, the following red countdown message appears at the top of every screen in GrantSolutions:

Your password will expire in xx day(s). <u>Please Change Now</u>

1. Click the link **Please Change Now** to set a new password.

Your password will expire in 13 day(s). <u>Please Change Now</u>

Figure 23: Password expiration prompt from within GrantSolutions

2. The "Change Password" screen appears. Enter the **Current Password**, **New Password**, and **Confirm New Password**. Click the **Submit** button.

Change Password

✱ **indicates a required field.**

GrantSolutions Password Policy
Passwords must:

✓ be at least 8 characters
✓ contain at least 1 uppercase letter
✓ contain at least 1 lowercase letter
✓ contain at least 1 number
✓ contain at least 1 special character(!, @, #, $, etc)

Passwords should not:

- be the same from your last 6 passwords
- contain dictionary words
- contain common names
- contain all or part of your username
- contain consecutive character strings(abcdefg, 12345678)
- contain simple keyboard(qwerty)
- use special characters to replace letters to spell a word(P@ssword1)

Current Password ✱ ●●●●●●●●●●●
New Password ✱ ●●●●●●●●●●●
Confirm New Password ✱ ●●●●●●●●●●● ✓

SUBMIT   CANCEL

Figure 24: Change Password screen

3. The "Confirmation of New Password" screen displays. Click the **Re-Login** button.
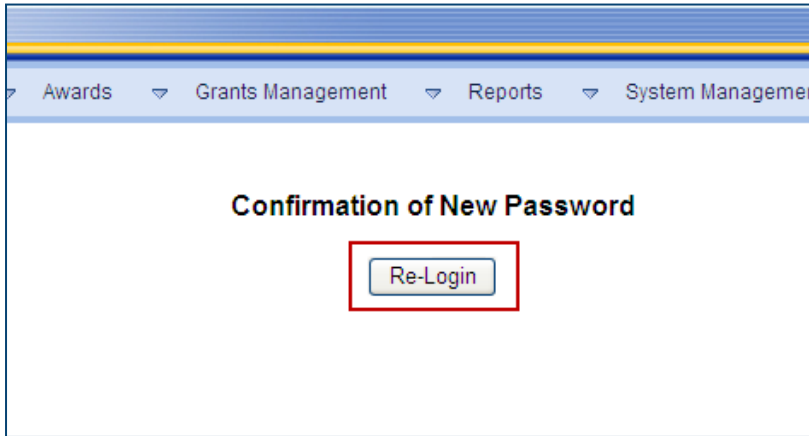
Figure 25: Confirmation of New Password screen

4. The GrantSolutions "Login" screen appears. Login using the newly reset password.

5. The "My Grants List" screen displays.

Figure 26: My Grants List screen

Navigation

After logging into the GrantSolutions GMM, the first screen that appears is "My Grants List". This page contains all active awards assigned to the Grantee organization.

Each screen in the GrantSolutions GMM contains the menu bar, the footer, and quick links to the user's profile and Log Out.

MENU BAR

The GrantSolutions GMM menu bar is located towards the top of each screen. Use the mouse or keyboard to expand each menu item.

Figure 27: Menu Bar

Account Management

The *Account Management* menu contains four sub-menus. They are as follows:

- **Update Profile**: Update personal phone numbers, address information, and turn two-factor authentication on or off

- **Change Password**: Change current password

- **User Roles**: View assigned GrantSolutions authorities

- **Notification Preferences**: Modify automatic notifications sent from GrantSolutions

- **CCR Validation**: View your organization's Central Contractor Registry (SAM.gov) information
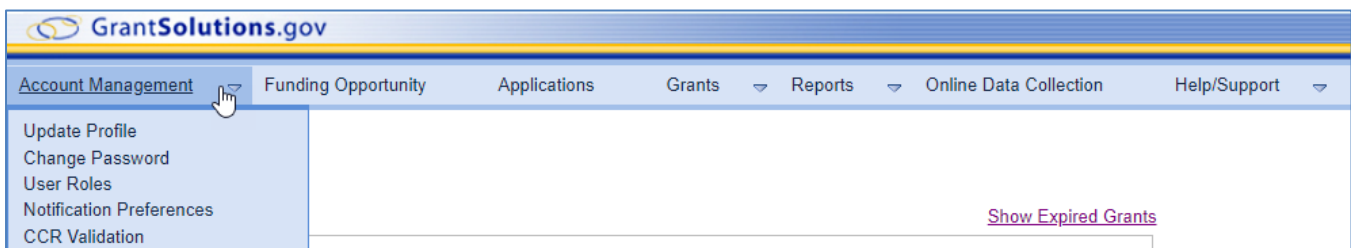
Figure 28: Account Management menu

Funding Opportunity

From the *Funding Opportunity* menu, Grantees can view and apply for available funding opportunities, including Non-Competing Continuations, Directed Supplements, Directed Announcements, and Competitive Announcements that may be applied for through the GrantSolutions GMM.

Figure 29: Funding Opportunity Menu

Applications

From the *Applications* menu, access the list of all started and submitted applications, except for Amendment applications.
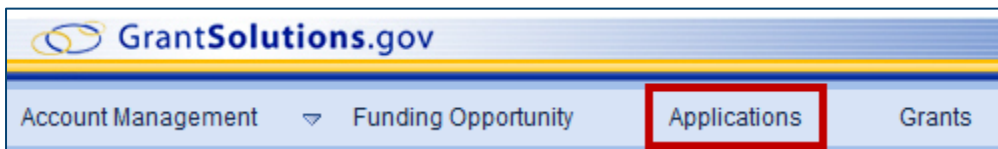
Figure 30: Applications Menu

Application statuses are listed along with possible actions. The *Action* column contains the following options:

- **Open**: View a submitted/awarded application

- **Notes**: Add an Application Note to the official application record

- **Remove**: Delete an application in progress (only for applications not yet submitted)

- **Send Message**: Grantees no longer use the Send Message option

Figure 31: My Applications List

*Note: Amendment applications are tracked via the **Manage Amendments** screen, not the My Applications List.*

Grants

Use the *Grants* menu to return to "My Grants List" screen, or to view/accept or decline "Pending Grants".
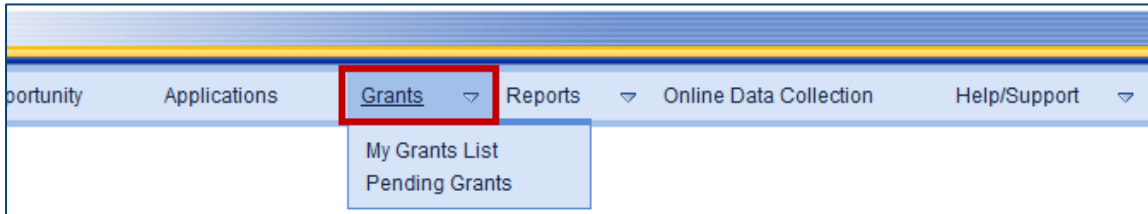
Figure 32: Grants Menu

Note: Not all agencies require Grantees to accept pending grants via GrantSolutions. Please contact the awarding agency for direction.

Pending Grants (Accept Grant)

When a grant is awarded, some Federal agencies may require the Grantee Authorizing Official (ADO role) to log into GrantSolutions to **View** and **Accept** or **Decline** the award on behalf of their organization.

To view the pending award:

1. Log into GrantSolutions (www.grantsolutions.gov)

2. The "My Grants List" screen displays. From the menu bar, select **Grants – Pending Grants**.
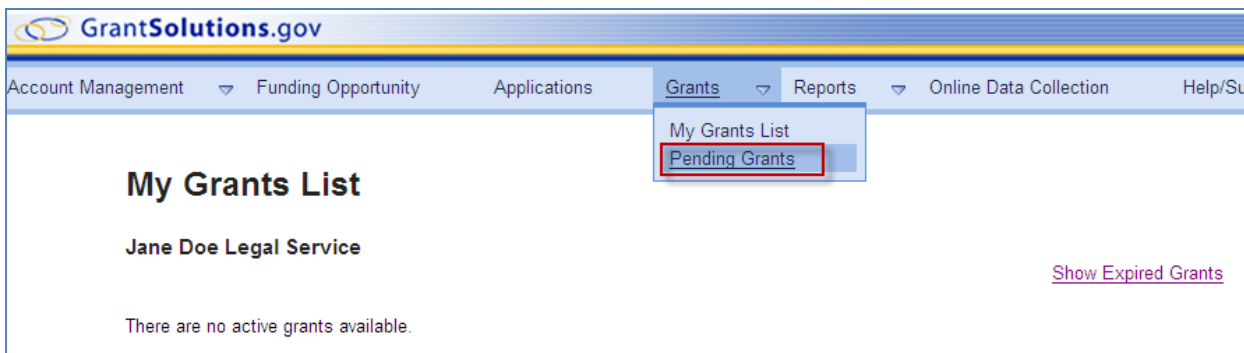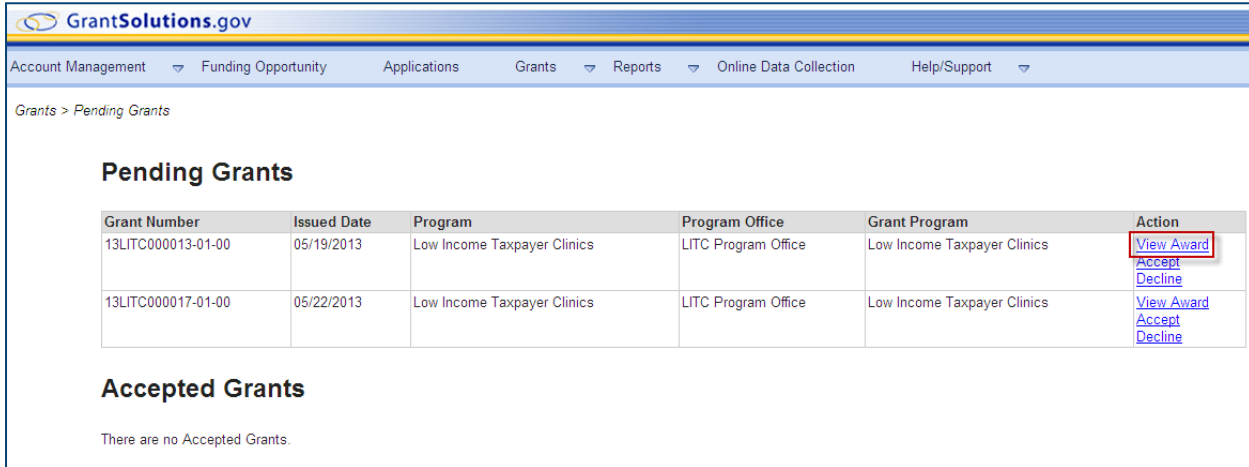
Figure 33: My Grants List screen - Grants: Pending Grants submenu

3. The "Pending Grants" screen appears. All grants awaiting acceptance are available from this screen. To view the Notice of Award (NOA), from the *Action* column, click the link **View Award**.
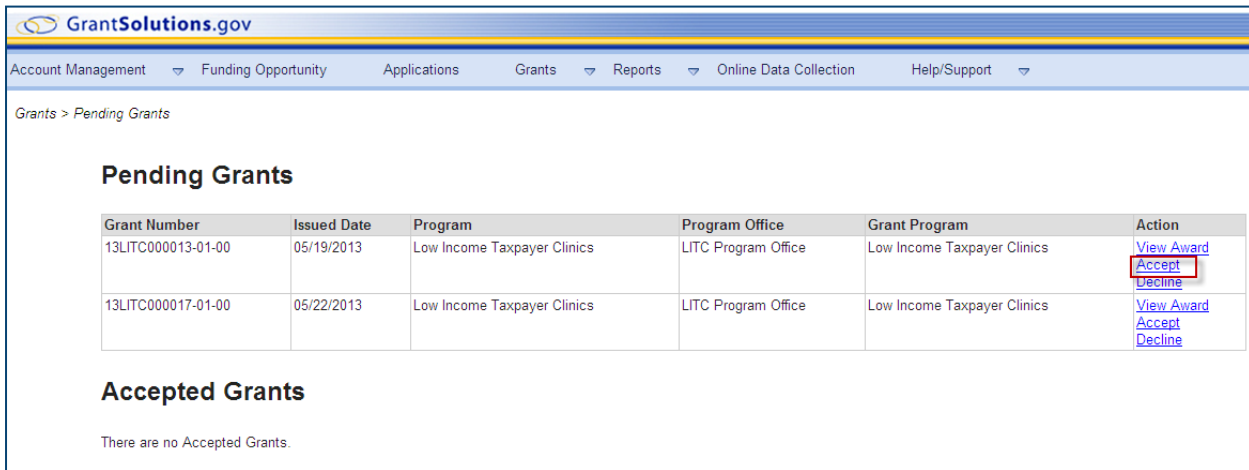
Figure 34: Pending Grants screen

4. The NOA opens as a PDF in a new window. The PDF may be saved or printed. When done viewing the award, click the **X** in the upper right corner of the PDF to close the window and return to the "Pending Grants" screen.

5. To accept the award, from the *Action* column, click the **Accept** link.
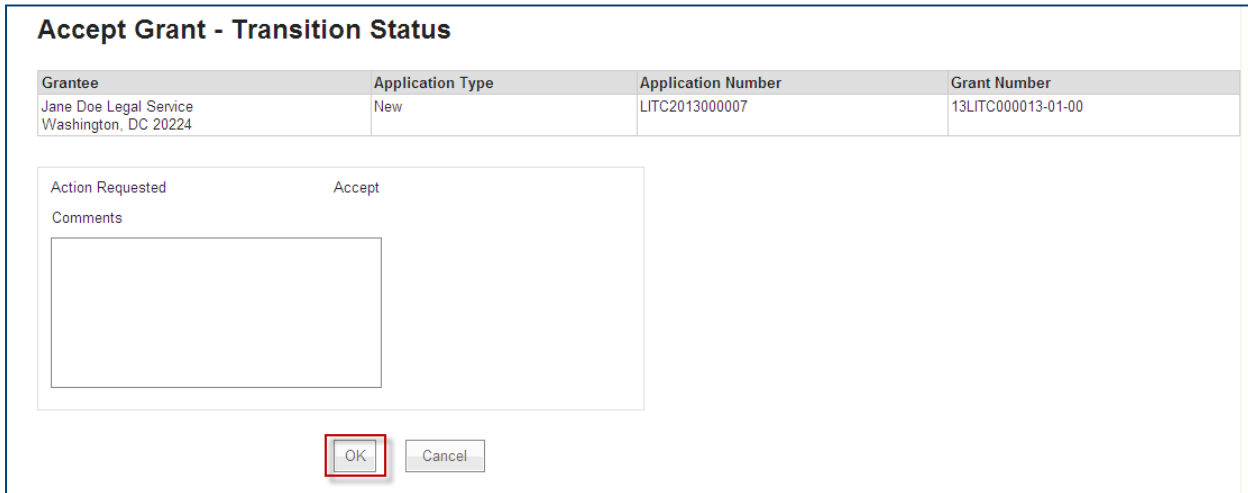
Figure 35: Pending Grants screen - Accept link

6. The "Accept Grant – Transition Status" screen opens in a new window. Click the **OK** button.
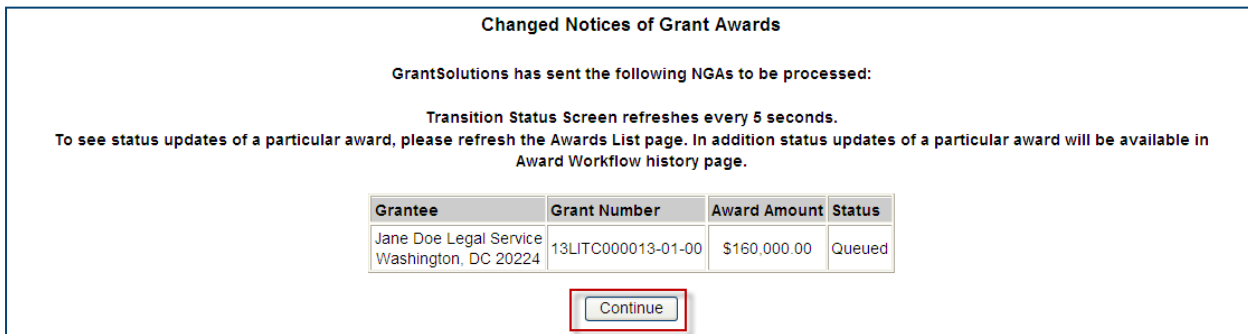
Figure 36: Accept Grant - Transition Status screen

7. The "Changed Notices of Grant Awards" screen appears. Click the **Continue** button.
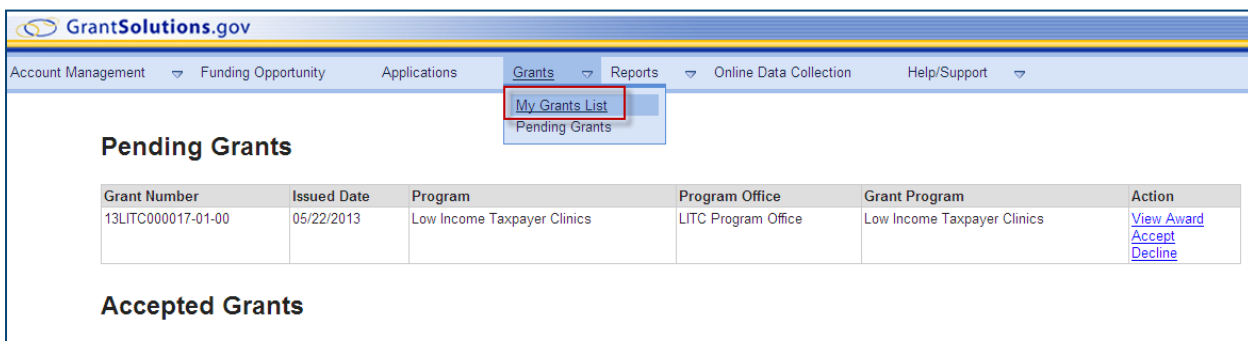
Figure 37: Changed Notices of Grant Awards screen

8. The "Pending Grants" screen opens, and the accepted grant is removed from the list. To return to the "My Grants List" screen, select **Grants – My Grants List** from the *menu bar*.

Figure 38: Pending Grants screen

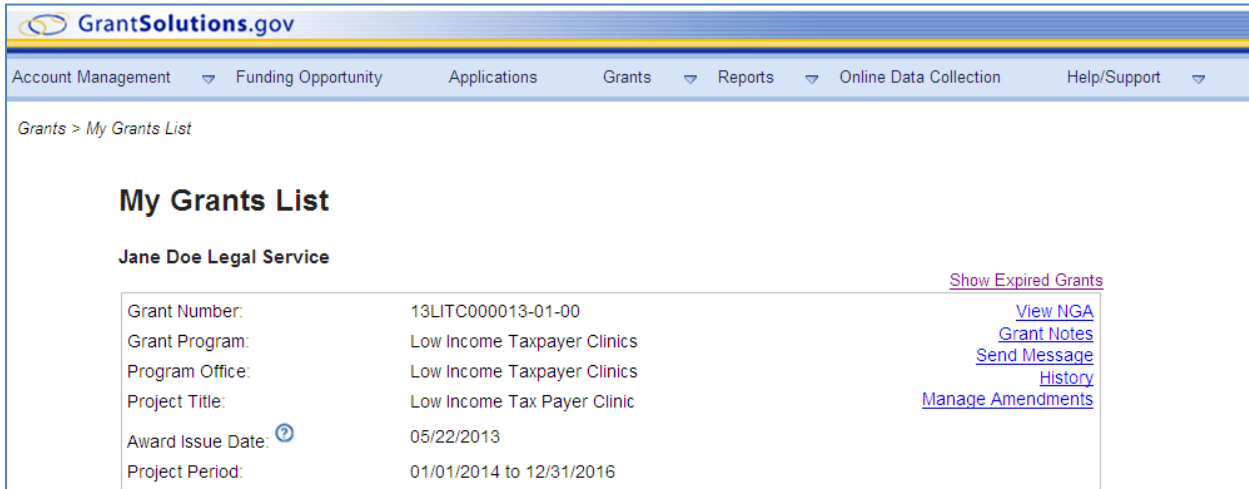9. The "My Grants List" screen appears, and the accepted grant is available.

Figure 39: My Grants List screen

Reports

The *Reports* menu provides access to the Federal Financial Reports (FFR) screen. Only access this screen if directed by the awarding agency's Grants Office. For more in-depth information about the FFR, please refer to the guide "Grantee Reporting Process: Federal Financial Report (FFR)" and the training videos available from the Grantee Support and Reference site.
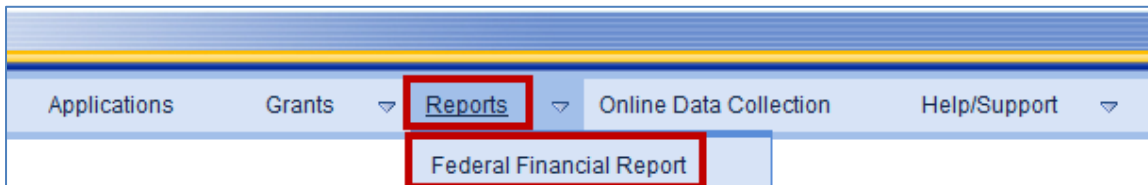

Figure 40: Reports Menu - Federal Financial Report

Online Data Collection

The Online Data Collection menu is a link that when clicked, opens the Online Data Collection (OLDC) system. Only access this screen if directed by the awarding agency.
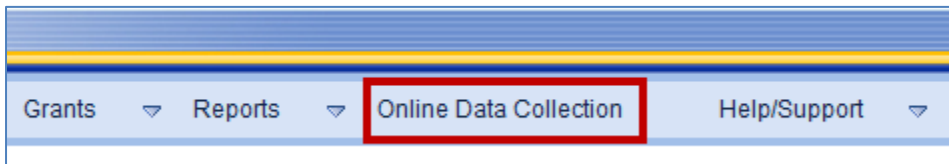

Figure 41: Online Data Collection menu

Help/Support

Use the *Help/Support – Documentation* menu to access the "Grantee Support and Reference" site.
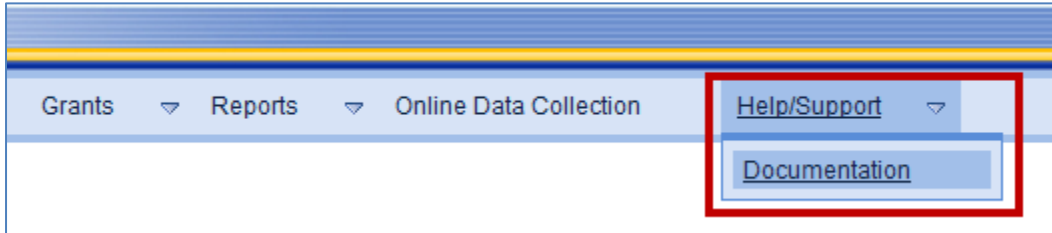

Figure 42: Help/Support – Documentation menu

The "Grantee Support and Reference" site contains Guides, Quick Sheets, Training Videos, and Grantee Registration information.
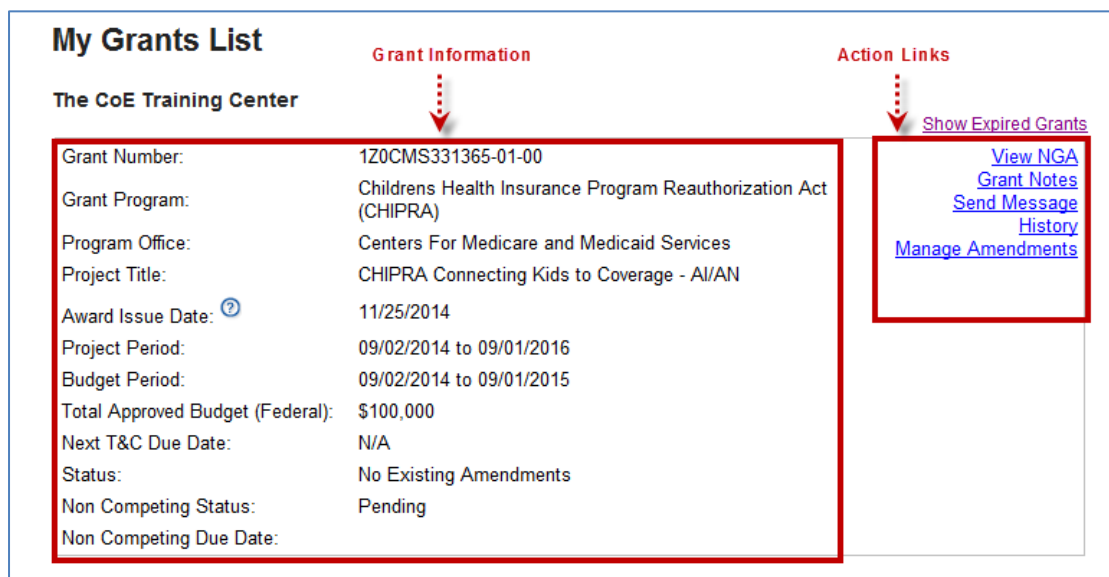

Figure 43: Grantee Support and Reference site

My Grants List

"My Grants List" is the main screen for viewing and managing existing grants. Each awarded grant is listed in its own note card. "My Grants List" may contain one or more note cards depending on the number of awarded grants available. To view expired grants (grants where the project period end date is passed), click the **Show Expired Grants** link towards the top left of the first note card.

Each award contains the following read-only grant information:

- Grant Number
- Grant Program
- Program Office
- Project Title
- Award Issue Date
- Project Period dates

- Budget Period dates
- Total Approved Budget (Federal)
- Next Terms and Conditions Due Date (if applicable)
- Amendment Status (if applicable)
- Non Competing Status (if applicable)
- Non Competing Due Date (if applicable)

Each award also contains several action links. These include *View NGA, Grant Notes, History*, and *Amendments*. Other action links such as *Apply for Non Competing Continuation, FFR,* and *Progress Reporting* may also be visible on the screen.

Figure 44: My Grants List screen

VIEW NGA

Click the **View NGA** link to open the most recent issued Notice of Award as a PDF in a new window. To close the award, click the **X** in the upper left corner of the PDF window.
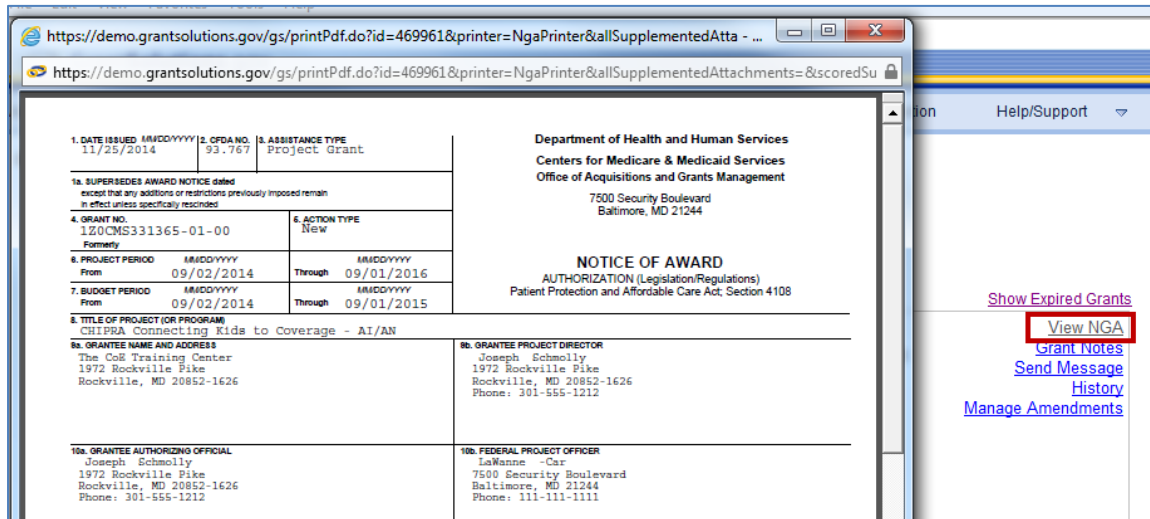
Figure 45: View NGA link and Notice of Award PDF

GRANT NOTES

Grant Notes are used to add correspondence comments and to attach necessary documents to a grant record in the GrantSolutions GMM. Notes are saved with the grant record for historical and tracking purposes.

To view or add a Grant Note:

1. Log into GrantSolutions (www.grantsolutions.gov).

2. The "My Grants List" screen appears. Locate the desired grant, and click the **Grant Notes** link.

Figure 46: My Grants List - Grant Notes link

3. The "Grant Notes" screen appears in a new window.

   The top portion of the screen contains the Grant information.

   The middle section contains search fields that may be used to locate specific Grant Notes. The search fields are populated from the previously added notes. The search fields are:

   - **Grant Note Create Date**: From and to dates

   - **Grant Note Type**: Correspondence

   - **Grant Note Category**: Pre-defined categories

   - **Author**: Name of user that created the Grant Note

   - **Subject**: Grant Note subject

Figure 47: Grant Notes screen

4. To add a new note, scroll towards the bottom of the window and click the **Add** button.

Grant Notes

Grant Number	1Z0CMS331365
Grantee Name	The CoE Training Center
Project Start Date	09/02/2014
Project End Date	09/01/2016

Grant Note Create Date	From [ ]	To [ ]
Grant Note Type	--All--	
Grant Note Category	--All--	
Author	--All--	
Subject	[ ]	
Hide Automatic Notes	☐	

Add   Search

Total 0 notes

5. The "Grant Note-Add" screen displays. Enter information in the required fields (indicated by a red asterisks).

- **Subject**: Enter the subject of the note. Conform to any organization's naming conventions

- **Note Type**: Correspondence is the only option and is automatically selected

- **Category Type**: Select from the pre-set list of categories

- **Notes**: Enter the note text (limit of 2000 characters)

- **Note Attachments** (Optional): Attach one or more files by entering a file description and uploading desired attachments

6. When done, click the **Submit** button.

Grant Notes - Add

Author	Anna-Lisa Walters-grantee
Subject ★	Training Note
Note Type ★ ⓘ	⦿ Correspondence
Category Type ★	Other ▼
Notes ★ ⓘ (Limit to 2000 characters)	Please see attachment

Note Attachments

Author	Anna-Lisa Walters-grantee
Description	
File to Upload:	Choose File No file chosen
	Upload

Description	Source Attachments	Status	Actions
Training Note	Budget.docx	SUCCESSFUL	📝 🗑 🔍

* Status updates every 10 seconds

Submit   Cancel

Figure 49: Grant Notes - Add screen

7. The "Grant Notes" screen reappears. Once a note is submitted, it is available for viewing in the GrantSolutions GMM.

8. Additionally, an automatically generated email notification is sent to the assigned Principal Investigator/Program Director and Grantee Authorizing Official alerting them that the Grant Note is added. However, the note is not contained in the body of the email. The user must log into the GrantSolutions GMM to view the Grant Note.

9. Only the author of the note can Edit or Delete the note. All other users with access to the grant have view-only access

Figure 50: Grant Notes table - Action column

10. Click the **Cancel** button to close the window and return to the "My Grants List" screen.

Figure 51: Grant Notes table - Cancel button

HISTORY

To view the entire history of the awarded grant, including all submitted and awarded applications, click the **History** link.

Figure 52: History link and Grant History screen

Manage Amendments

An amendment is a post-award change to a grant. Grantees may initiate certain types of amendments in the GrantSolutions GMM from the "My Grants List" screen. Amendment types may include, but are not limited to supplements, change in staff, budget revisions, carryover requests, change in Grantee address, and more.

Note: Contact the awarding agency for the types of amendments that can be created by a grant recipient.

To view amendments in progress or to initiate a new amendment, follow the below steps:

1. From the "My Grants List" screen, click the link **Manage Amendments**.

Figure 53: Manage Amendments link

Note: If more than one grant is available from the My Grants List screen, scroll through the page until the desired grant is located.

2. The "Manage Amendments" screen appears. All amendments are initiated and tracked from this screen. To begin a new amendment action, click the **New** button.

Manage Amendments

Grant Number	1Z0CMS331365
Grantee Name	The CoE Training Center
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN
Project Start Date	09/02/2014
Project End Date	09/01/2016
Last Issued NGA	11/25/2014 (View NGA)

Amendment #	Status	Submitted Date	Type	Budget Period	Action
		(There are no Amendments found for this Grant.)			

New   Close

Figure 54: Manage Amendments screen - New button

3. The "Select Amendment Type" screen appears. Click the radio button to the left of the desired amendment type, and then click the **Create Amendment** button.

Important! *The amendment types available to Grantees vary by the awarding agency. As a result, the amendment types on your screen may not match the image below.*

Figure 55: Select Amendment Type screen

4. The "GrantSolutions Amendment Application Control Checklist" screen appears. The checklist screen contains the following information:

- **Amendment Type**: The type selected from the "Select Amendment Type" screen

- **Status**: The stage of the Amendment application. Statuses include Work in Progress and Submitted

- **Print Application - Original Submission**: Click the *Original Submission* link to view, print, or save a PDF of the entire application package (completed forms, attachments, etc.)

- **Applicant, grant, and project information:** Read-only information about the award

- **Application Kit**: The application package that includes online forms, enclosures, attachments, and form status

- **Verify Submission**: Submit application

- **Close**: Return to the Mange Amendment screen

GrantSolutions Amendment Application Control Checklist

Post Award Action: Revision (Budget)

Work In Progress (Post Award)

This is your GrantSolutions Application Control Checklist (EACC). You will use the EACC 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 image. If an enclosure has not been verified, a red 'X' image is displayed.

Print Application:

Original Submission

Applicant	The CoE Training Center
Grant Number	1Z0CMS331365
Application Number	(To be assigned)
Action	Revision (Budget)
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN

Online Forms	Enclosure(s)	Attachment(s)	Status
SF-424 Application for Federal Assistance Version 2	Enter Online Enter Comments	N/A	☐
SF-424A Budget Information - Non-Construction	Enter Online Enter Comments	N/A	⚠
Information for the Applicant	**Enclosure(s)**	**Attachment(s)**	**Status**
CMS Amendment Types & Guidance for Submission	View PDF View Original Version	N/A	☐
Program Narrative	**Enclosure(s)**	**Attachment(s)**	**Status**
Budget Narrative		0 Uploaded Files 0 Mail-in Items	⚠
Additional Information to be Submitted	**Enclosure(s)**	**Attachment(s)**	**Status**
Cover Letter		0 Uploaded Files 0 Mail-in Items	☐

Amendment Package Status: Work In Progress (Post Award)

[Verify Submission]   [Close]

Figure 56: GrantSolutions Application Control Checklist screen

5. Once an amendment is created, the status is *Work in Progress*. If an amendment type is selected in error, click the **Close** button from the bottom of the screen to return to the "Manage Amendments" screen.

Figure 57: Close button

Optional: The "Manage Amendment" screen appears. Click the Delete Amendment link from the Action column to remove the amendment action.

Note: The Delete Amendment link is only active when the status is Work in Progress.

6. From the "Manage Amendments" screen, click the **Edit Amendment** link to continue working on the amendment action.

Manage Amendments

Grant Number	1Z0CMS331365
Grantee Name	The CoE Training Center
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN
Project Start Date	09/02/2014
Project End Date	09/01/2016
Last Issued NGA	11/25/2014 (View NGA)

Amendment #	Status	Submitted Date	Type	Budget Period	Action
(To be assigned)	Work In Progress (Post Award)		Revision (Budget)	1 09/02/2014 - 09/01/2015	Edit Amendment Delete Amendment Grant Notes History Send Message Set Budget Period

Figure 58: Manage Amendments screen - Edit Amendment and Delete Amendments links

7. The "GrantSolutions Amendment Application Control Checklist" screen appears. Scroll to the application kit (application package) section and enter the online forms. The forms in the kit vary depending on the Amendment type.

8. To electronically complete a form in the GrantSolutions GMM, click the **Enter Online** link for the desired form (i.e. SF-424A).

Online Forms	Enclosure(s)	Attachment(s)	Status
SF-424 Application for Federal Assistance Version 2	Enter Online Enter Comments	N/A	⊔
SF-424A Budget Information - Non-Construction	Enter Online Enter Comments	N/A	⚠
Information for the Applicant	**Enclosure(s)**	**Attachment(s)**	**Status**
CMS Amendment Types & Guidance for Submission	View PDF View Original Version	N/A	⊔
Program Narrative	**Enclosure(s)**	**Attachment(s)**	**Status**
Budget Narrative		0 Uploaded Files 0 Mail-in Items	⚠
Additional Information to be Submitted	**Enclosure(s)**	**Attachment(s)**	**Status**
Cover Letter		0 Uploaded Files 0 Mail-in Items	⊔

Figure 59: Application Control Checklist - Application Kit (Package) section

Note: Forms vary depending on the Amendment type.

9. The online form opens. Enter all data. When entering dollar amounts, do <u>not</u> use the dollar sign ($) or commas.

Figure 60: SF-424A Online Form

10. When done, scroll to the bottom of the screen and click the **Save** button.

Figure 61: SF-424A - Save button

11. (SF-424A only) – The "Would you like to transfer your budget totals information to the SF-424 form" message appears. Click **Yes**.

Figure 62: Would you like to transfer your budget totals information to the SF-424 form message

12. If there are no errors, the *Save Successful* message appears at the bottom of the screen.

Note: If there are problems, an error icon (red circle with white exclamation point) 🛈 *appears next to the cells that need corrections. To view the error text, point to the error icon with the mouse. Make change and then click the Save button again.*

13. Click the **Close** button.

Figure 63: Close button

14. The "GrantSolutions Amendment Application Control Checklist" screen opens. A *Print Completed* link appears below the *Enter Online* link for the form that was just saved. The *Print Completed* link allows the user to open or save that form as a PDF. Additionally, the status column contains a green checkmark, indicating the form was successfully saved.

Figure 64: Application Kit

Status Icons

Status Icon	Description
✓	In progress or completed. Unless otherwise directed, each item in the kit should have a green check mark before submitting the Amendment. Please note that a green check mark does not mean the information is correct, just that data is entered or attached.
⚠	It is recommended that you complete this item.
⌴	Not started (optional).
✗	The enclosure is not validated (Incomplete).

15. Complete additional forms and attach any necessary files. To attach a file, located the desired row and click the **Uploaded Files** link from the *Attachments* column.

Figure 65: Attachments column - Uploaded Files link

16. The "Attachments" screen appears. Click the **Upload Attachment** button.

Attachments

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

Organization Name: The CoE Training Center
Application Number: (To be assigned)
Project Title: CHIPRA Connecting Kids to Coverage - AI/AN
Project Period: 09/02/2014 to 09/01/2016

Enclosure: Budget Narrative
Number of Attachments: 0

Item Description	Type	Review	Action
(Empty)			

[Upload Attachment]   [Add Mail-in Item]   [Close]

Figure 66: Attachments screen

17. The "Attachment – Upload" screen appears in a new window. Enter a file description in the **Description** field, **choose a file** to attach, and click the **Attach** button.

Attachment - Upload

Organization Name: The CoE Training Center
Application Number: (To be assigned)
Project Title: CHIPRA Connecting Kids to Coverage - AI/AN
Project Period: 09/02/2014 to 09/01/2016

*Description: [   ]

Select a file
*Step 1:   [Choose File] No file chosen

Step 2:   Press the attach button to have GrantSolutions upload the file. Please allow sufficient time for the file upload to complete. This will vary based upon your connection speed and the size of your file. If the file is successfully uploaded, you will be returned to the attachment list.

[Attach] [Cancel]

Figure 67: Attachment - Upload window

18. The "Attachments" screen appears, and the attachment is visible. Click the **Close** button.
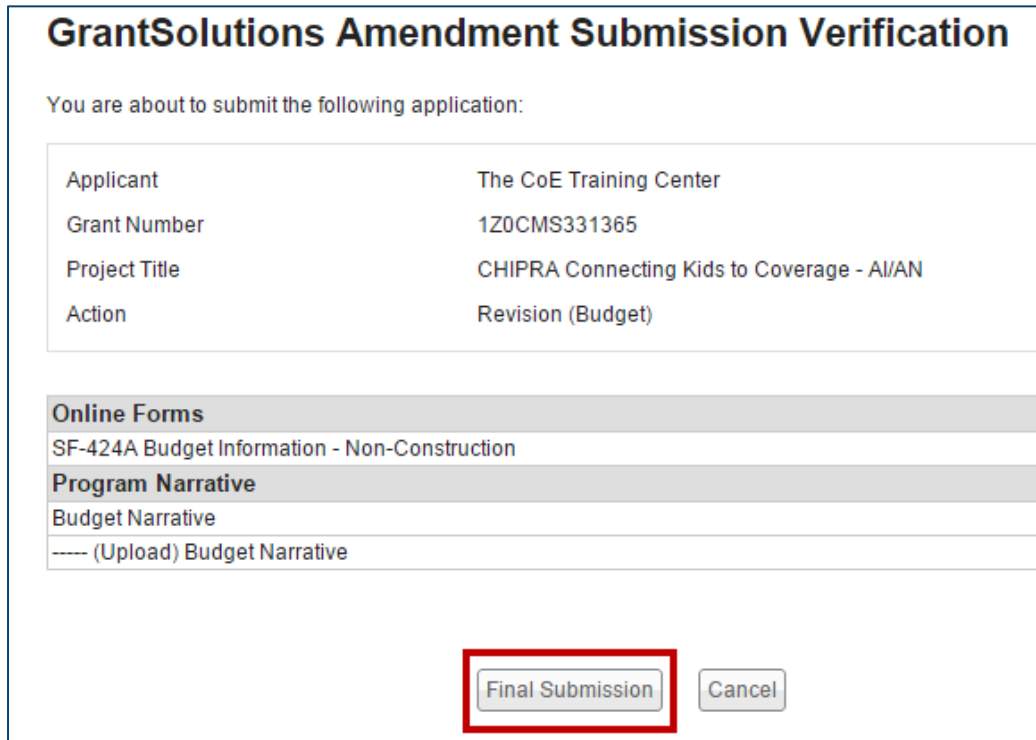

Figure 68: Attachments screen

19. The "GrantSolutions Amendment Application Control Checklist" screen appears. Once all necessary forms are completed, attachments are uploaded, and there is one or more check mark in the *Status* column, click the **Verify Submission** button.
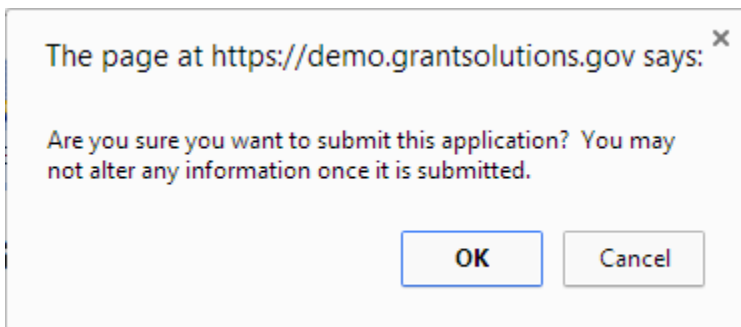

Figure 69: Verify Submission button

20. The "GrantSolutions Amendment Submission Verification" screen appears. Review the page to ensure all online forms are listed. Click **Final Submission**.

21. The "Are you sure you want to submit this application? You may not alter any information once it is submitted." message displays. Click Cancel to return to the previous screen or click **OK** to continue.

22. The "Amendment Status Confirmation" screen appears, and the Grantor receives email notification that the amendment application is submitted. Click the **Application Control Checklist** button to return to the now submitted application kit.

Amendment Status Confirmation

Grants has marked the following application as submitted:

* Please submit signed copies of forms if you have been instructed by your program or grant office.

Office of Acquisitions and Grants Management
7500 Security Boulevard
Baltimore, MD 21244

Applicant	The CoE Training Center
Grant Number	1Z0CMS331365
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN
Action	Revision (Budget)
Submitted Date	12/01/2014 09:49 AM Eastern Time

Application Details

Items	Item Attachments		
	Type	Date Expected	Date Received
SF-424A Budget Information - Non-Construction			
Budget Narrative			
Budget Narrative	Upload	N/A	12/01/2014

Application Control Checklist

Figure 72: Amendment Status Confirmation screen

23. The "GrantSolutions Amendment Application Control Checklist screen appears". Confirm that the status is *Submitted (Post Award).* Click the **Close** button at the bottom of the screen to return to Manage Amendments page.

Amendment Package Status: Submitted (Post Award)

Mail-In Package Information: Office of Acquisitions and Grants Management is

Close

Figure 73: Checklist screen Close button

24. The "Manage Amendments" screen appears. At this point, the Grantee may view the amendment application but cannot perform any actions. As the amendment progresses through the review and approval process, the status updates.

Figure 74: Manage Amendments screen

25. If the Grantor needs the Grantee to make changes to the application, the Grantor can *Return* the amendment for edits.

Assigned users with the roles Grantee Authorizing Official (ADO) and Principle Investigator/Program Director (PI/PD) for the latest issued Notice of Award and for the active budget period receive email notification when an application is returned.

The application status changes to *Work in Progress* and the **Edit Amendment** link is available.

Figure 75: Manage Amendments screen

26. Make any changes and re-submit the amendment application.

Non-Competing Continuations

Non-Competing Continuations can be viewed and processed in the GrantSolutions GMM. If the Grantee organization qualifies for more than one period of support, the application process can be performed in the system. Typically, a non-compete condition exists where the current budget period end date is before the project period end date and requires a new budget period for an existing project. If the Grantee qualifies for a non-compete application, the "My Grants List" visibly displays the *status* and *apply* links.

Once the awarding agency posts the non-competing continuation kit (application package), the Grantee may select the **Apply For Non Competing Award** link to begin the application process.

Note: Once started, Non-Competing applications may be accessed via the Applications menu or from the "My Grants List" screen.

To apply for a Non-Competing Continuation in the GrantSolutions GMM:

1. From the "My Grants List" screen, locate the grant and click the link **Apply For Non Competing Award**.

		View NGA
Grant Number:	1 HBEIE130131-01-00	Grant Notes
Grant Program:	State Exchange Planning and Implementation	Send Message
Program Office:	OCIIO/OHIE	History
Project Title:	State Exchange Test	Manage Amendments
Award Issue Date: ⑦	06/25/2013	
Project Period:	09/25/2013 to 11/12/2014	
Budget Period:	09/25/2013 to 09/24/2014	
Total Approved Budget (Federal):	$100,000	
Next T&C Due Date:	N/A	
Status:	Work In Progress (Post Award) (Budget Revision)	
Non Competing Status:	LATE	Apply For Non Competing Award
Non Competing Due Date:	08/15/2013	

Figure 76: My Grants List - Apply for Non Completing Award link

2. The "GrantSolutions Non-Competing Continuation Application Control Checklist" screen appears with the status *Work in Progress*.

Figure 77: GrantSolutions Non-Competing Continuation Application Control Checklist screen

3. The checklist screen contains the following information:

- **Status**: The status of the application. Statuses include Work in Progress and Submitted

- **Print Application – Original Submission**: Click the *Original Submission* link to view, print, or save a PDF of the entire application package (completed forms, attachments, etc.)

- **Grantee, grant, and project information:** Read-only information about the award

Figure 78: GrantSolutions Non-Competing Continuation Application Control Checklist - General Instructions and Information

- **Application Kit**: Includes online forms, enclosures, attachments, and form status

Figure 79: GrantSolutions Non-Competing Continuation Application Control Checklist - Application Kit

- **Verify Submission**: Submit application

- **Close**: Return to the "My Grants List" screen

4. To enter an online form, select the **Enter Online** link to the right of the form name.

    Note: Required forms vary by program and awarding agency.

Figure 80: GrantSolutions Non-Competing Continuation Application Control Checklist screen - Enter Online link

5. The selected online form displays. Enter all necessary information.

    Note: When entering dollar amounts, do not use the dollar sign ($) or commas.

6. Upon completing the form, click the **Save** button.

Figure 81: Online form - Save button

Tip: On the 424A only, the message "Would you like to transfer your budget totals information to the SF-424 form" appears. Click Yes.

7. If there are no errors, the *Save Successful* message appears at the bottom of the screen.

    Note: If there are problems, an error icon (red circle with white exclamation point) appears next to the cells that need corrections. To view the error text, point to the error icon with the mouse. Make change and then click the Save button again.

8. Click the **Close** button.
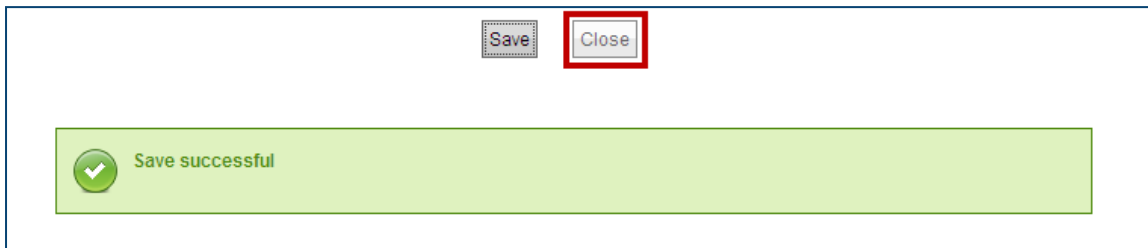
Figure 82: Online form - Close button

9. The "GrantSolutions Non-Competing Continuation Application Control Checklist" screen appears. Complete additional forms and attach any necessary files. To attach a file, located the desired row and click the **Uploaded Files** link from the *Attachments* column.

Figure 83: Attachments column - Uploaded Files link

10. The "Attachments" screen appears. Click the **Upload Attachment** button.

Figure 84: Attachments screen

11. The "Attachment – Upload" screen appears in a new window. Enter a file description in the **Description** field, **choose a file to** attach, and click the **Attach** button.

Figure 85: Attachment - Upload window

12. The "Attachments" screen appears, and the attachment is visible. Click the **Close** button.

Figure 86: Attachments screen

13. The "Application Control Checklist" screen reappears. Once all data is entered, saved, and any documents uploaded, click the **Verify Submission** button located towards the bottom of the screen.

Figure 87: Verify Submission and Close buttons

14. The "GrantSolutions Non Competing Application Submission Verification" screen appears. Click the **Final Submission** button to submit the application. Once submitted, the Grantee may not alter any information.

GrantSolutions Non Competing Application Submission Verification

You are about to submit the following application:

Grantee	The Swivel Chair Center
Grant Number	HBEIE130131
Project Title	State Exchange Test
Due Date	08/15/2013 12:00 AM(GMT - 05:00) Eastern Time (US & Canada)

Online Forms

SF-424A Budget Information - Non-Construction

*** SF-LLL Disclosure of Lobbying Activities

----- (Mail-in Signature Page) Required Signature Page - Please sign & mail in.

*** It appears from what you have entered that your application is not complete. To correct, press the "Cancel" button to return to the Application Control Checklist.

* Prior to submitting your application, it is recommended that you complete the Central Contractor Registration validation process. To continue with the application submission process without validating your Organization, click "Final Submission" Otherwise, click "Cancel" and perform the Central Contractor Registration validation process within your Organization record.

★ Enter the date Office of Acquisitions and Grants Management will receive your package of mail-in attachments: [   ] (MM/DD/YYYY)

[Final Submission] [Cancel]

Figure 88: GrantSolutions Non Competing Application Submission Verification screen

15. The "Non Competing Application Status Confirmation" screen displays. Click the **Application Control Checklist** button to view the read-only checklist screen and verify the status.

Non Competing Application Status Confirmation

Grants has marked the following application as submitted:

* Please submit signed copies of forms if you have been instructed by your program or grant office.

Office of Acquisitions and Grants Management
7500 Security Boulevard
Baltimore, MD 21244-1850-1850

Grantee:	The Swivel Chair Center
Grant Number:	HBEIE130131
Project Title:	State Exchange Test
Due Date:	08/15/2013 12:00 AM(GMT - 05:00) Eastern Time (US & Canada)
Submitted Date:	05/20/2014 04:36 PM Eastern Time

Application Details

Items
SF-424A Budget Information - Non-Construction

[Application Control Checklist]

Figure 89: Non Competing Application Status Confirmation

16. Click the **Close** button to access the "My Applications List" screen or select **Grants → My Grants** to return to the "My Grants List" screen.

Note: The "My Applications List" screen may also be accessed by selecting Applications from the menu bar.