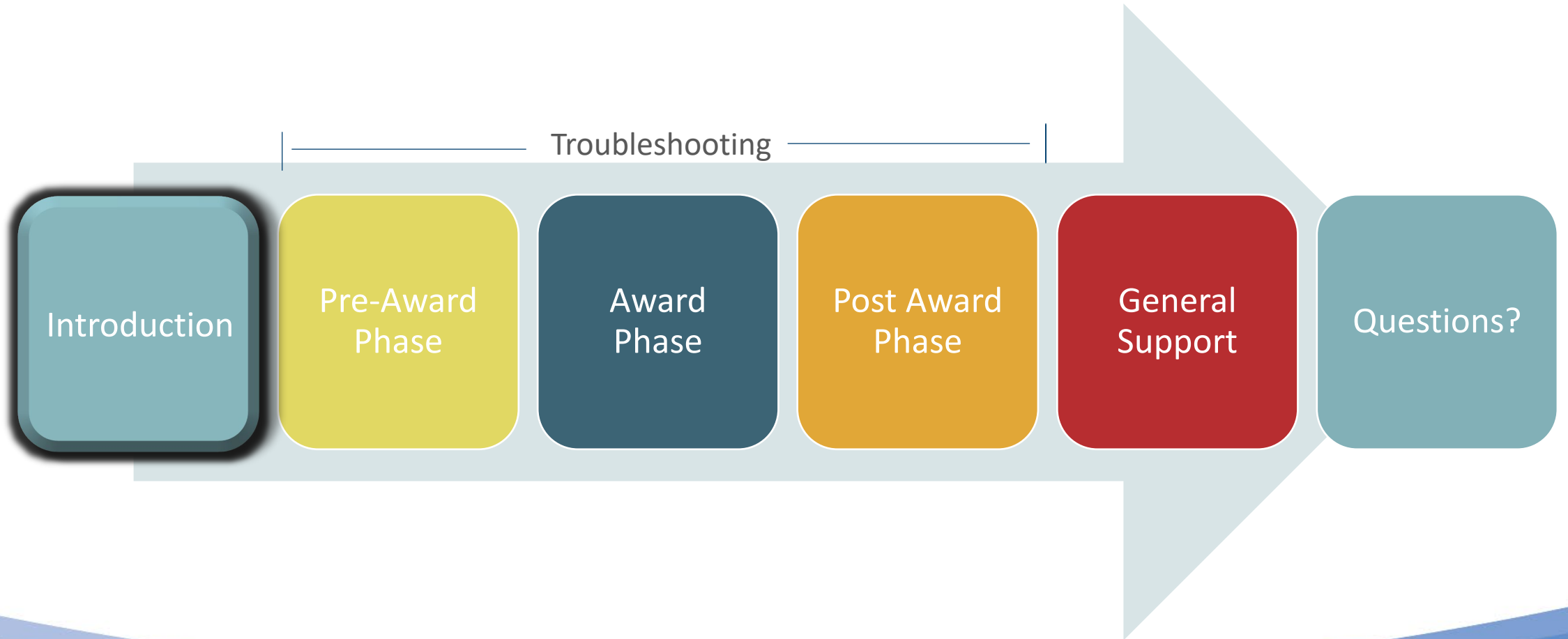


# What to Do When Things Don't Go as Expected

## Program Office

Fall User Group  
Presenters: Justin Maxwell, Samantha Steinman,  
Gina Campanile  
October 27, 2022

# Agenda



# Introduction



## Disclaimer:

*This Presentation is intended to answer some common  
Program Office Questions.*

*Please note that we are attempting to answer questions generically.*

*Each partner may have unique workflow customizations.*

*Please contact your Partner Services team for questions regarding your organization's  
specific processes.*

# Introduction



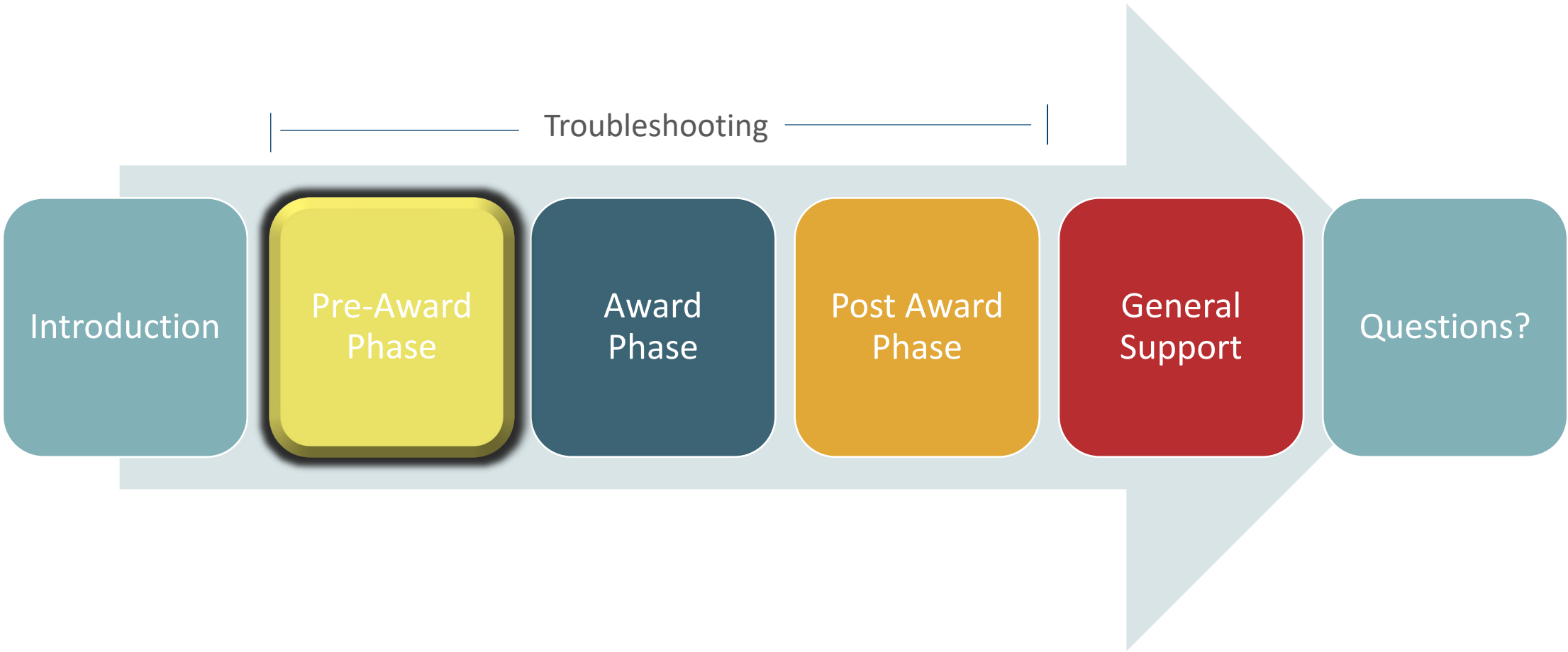
**Justin Maxwell**  
Partner Success Analyst  
ACF



**Samantha Steinman**  
Partner Success Analyst  
DHS,OASH,ASPR



**Gina Campanile**  
Partner Success Analyst  
CMS & IHS





# Question 1

I need to create a Funding Memo, but the application does not appear on the Funding Memo screen. What do I do?



**Funding Memo**

Application Type

Announcement

Funding Opportunity #

Grant Program

Application Number

Grant Number

Assignment Options  Only Display Memos for Primary Assignments

Display Options  Only Display Memos for Projects Assigned to Me


Workflow States  All Status  Not Started  Complete


<input checked="" type="checkbox"/> Administrative Review	<input checked="" type="checkbox"/> Approved	<input checked="" type="checkbox"/> Budget Review
<input checked="" type="checkbox"/> Coordinator Review	<input checked="" type="checkbox"/> Deputy Review	<input checked="" type="checkbox"/> Director Review
<input checked="" type="checkbox"/> Disapprove Review	<input checked="" type="checkbox"/> Disapproved	<input checked="" type="checkbox"/> Draft
<input checked="" type="checkbox"/> Exception	<input checked="" type="checkbox"/> Financial Review	<input checked="" type="checkbox"/> Funds Not Certified
<input checked="" type="checkbox"/> Grants Review	<input checked="" type="checkbox"/> Ready For Approval Override	<input checked="" type="checkbox"/> Ready To Approve
<input checked="" type="checkbox"/> Research Review	<input checked="" type="checkbox"/> Staff Review	

[\(Search filter: Disabled\)](#)


**No results found for the search criteria.**


## Funding Memo


Application Type 

Announcement 

Funding Opportunity #


Grant Program 

Application Number 

Grant Number 

Assignment Options  
 Only Display Memos for Primary Assignments

Display Options  
 Only Display Memos for Projects Assigned to Me

WorkFlow States   
 All Status  Not Started  Complete

<input checked="" type="checkbox"/> Administrative Review	<input checked="" type="checkbox"/> Approved	<input checked="" type="checkbox"/> Budget Review
<input checked="" type="checkbox"/> Coordinator Review	<input checked="" type="checkbox"/> Deputy Review	<input checked="" type="checkbox"/> Director Review
<input checked="" type="checkbox"/> Disapprove Review	<input checked="" type="checkbox"/> Disapproved	<input checked="" type="checkbox"/> Draft
<input checked="" type="checkbox"/> Exception	<input checked="" type="checkbox"/> Financial Review	<input checked="" type="checkbox"/> Funds Not Certified
<input checked="" type="checkbox"/> Grants Review	<input checked="" type="checkbox"/> Ready For Approval Override	<input checked="" type="checkbox"/> Ready To Approve
<input checked="" type="checkbox"/> Research Review	<input checked="" type="checkbox"/> Staff Review	

[\(Search filter Disabled\)](#)

No results found for the search criteria.

1- Ensure you have the correct application/grant number entered in the appropriate field.

2 - Ensure the "All Statuses" check box is selected.

3 - Ensure the correct criteria is selected.

4 - Ensure you have a Program Office role. If you are unsure about your role contact the help desk.

5 - If New or Non-Competing Continuation, the application must be approved and saved on the Application Recommendation screen before it is available on the Funding Memo screen.

6 - If an Amendment Application, the amendment application must be in the "Complete" status before it is available on the Funding Memo screen.



I need to change the amount on the Application Recommendation screen, but the Funding Memo is already in the approval process. Who do I need to contact?



**Application Recommendation**

Requested Non Federal Amount	Recommended Non Federal Amount	Requested Federal Amount	Recommended Federal Amount	Recommended Total

To make changes to the Application Recommendation screen, the Funding Memo must first be deleted.

If the Funding Memo is already in the approval process, contact the Program Authorizing Official (PAO) to have them reject and delete the Funding Memo.

Use the “Next Workflow Actions” link from the Funding Memo screen to determine which official can send it back in the process.

<a href="#">Application Number / Application Type</a>	<a href="#">CMS Project Number / Grant Number</a>	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
New				Federal: \$120,000.00 Non-Federal: \$0.00	Grants Review Federal: \$120,000.00 Non-Federal: \$0.00	<a href="#">Project Locale :</a>	<a href="#">History View</a> <a href="#">View Full Review</a> <a href="#">Application Notes</a> <a href="#">Manage Project Abstract</a> <a href="#">Project Assignments</a> <a href="#">Budget Worksheet</a> <a href="#">Business Review</a>  <a href="#">Concur</a> <a href="#">Non-Concur</a> <a href="#">Reject</a>

Next Workflow Actions for Application Number: 1A12011000037

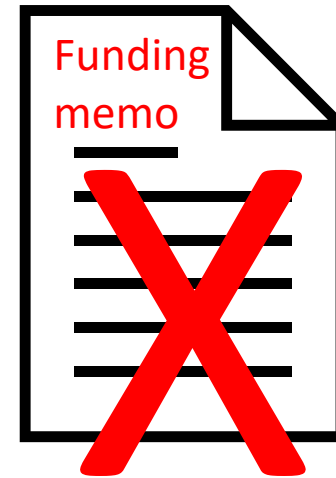
Possible workflow transitions include: Reject, Generate, Disapprove

Reject can be performed by the following Authorizing Official:

[F...](#) [...](#)

Generate can be performed by the following Grants Management Officer:

What happens when a Funding Memo is rejected?  
What do I do?



**REJECT**

Funding Memo for

) has been rejected and requires your review.

Announcement: N/A

Organization:

Grant#:

Application#:

Application Type: Non-Competing Continuation

Amendment Type:

To review this action in GrantSolutions, please click the application number above or use the following URL.

<https://www.grantsolutions.gov/gs/ws/process/memo>

-----

This message has been sent by GrantSolutions (<https://www.grantsolutions.gov>)

When the Funding Memo is rejected, if you are assigned to the project, you will receive email notification.



### Funding Memo

Application Type <sup>?</sup>

Announcement <sup>?</sup>

Funding Opportunity #

Grant Program <sup>?</sup>

Application Number <sup>?</sup>

Grant Number <sup>?</sup>

Assignment Options  Only Display Memos for Primary Assignments

Display Options  Only Display Memos for Projects Assigned to Me

WorkFlow States <sup>?</sup>  All Status  Not Started  Complete

Administrative Review     Approved     Budget Review  
 Coordinator Review     Deputy Review     Director Review  
 Disapprove Review     Disapproved     Draft  
 Exception     Financial Review     Funds Not Certified  
 Grants Review     Ready For Approval Override     Ready To Approve  
 Research Review     Staff Review

(Search filter: Disabled)

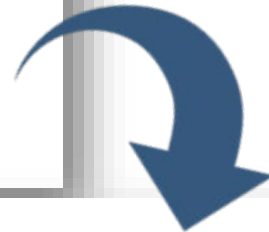
Search Close

Prev 1 2 3 4 5 ... 13 14 Next

Total Records Count: 20

<a href="#">Application Number / Application Type</a>	<a href="#">Grant Number / Budget Period</a>	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
	Budget Period: 1			Federal: \$33,020,706.00 Non-Federal: \$8,255,178.00	Draft Federal: \$33,020,706.00 Non-Federal: \$8,255,178.00	<a href="#">Project Locale :</a>	<a href="#">History</a> <a href="#">View</a> <a href="#">View Full Review</a> <a href="#">Application Notes</a> <a href="#">Manage Project Abstract</a> <a href="#">Project Assignments</a> <a href="#">Budget Worksheet</a> <a href="#">Business Review</a> <a href="#">Recommend</a>

The Funding Memo is then in the Draft status. The comments section of the Funding Memo will tell you why it was rejected.



Approval History				
User	Action	Task	Completed Date	Action Comments
	Recommend	Draft	05/20/2015 12:02 PM EDT	
	Approve	Ready To Approve	05/20/2015 01:51 PM EDT	
	Disapprove	Approved	06/29/2015 11:28 PM EDT	Duplicate - Grant was issued in June 2015
		Disapproved		



Applications > Application Recommendation

**Application Recommendation**

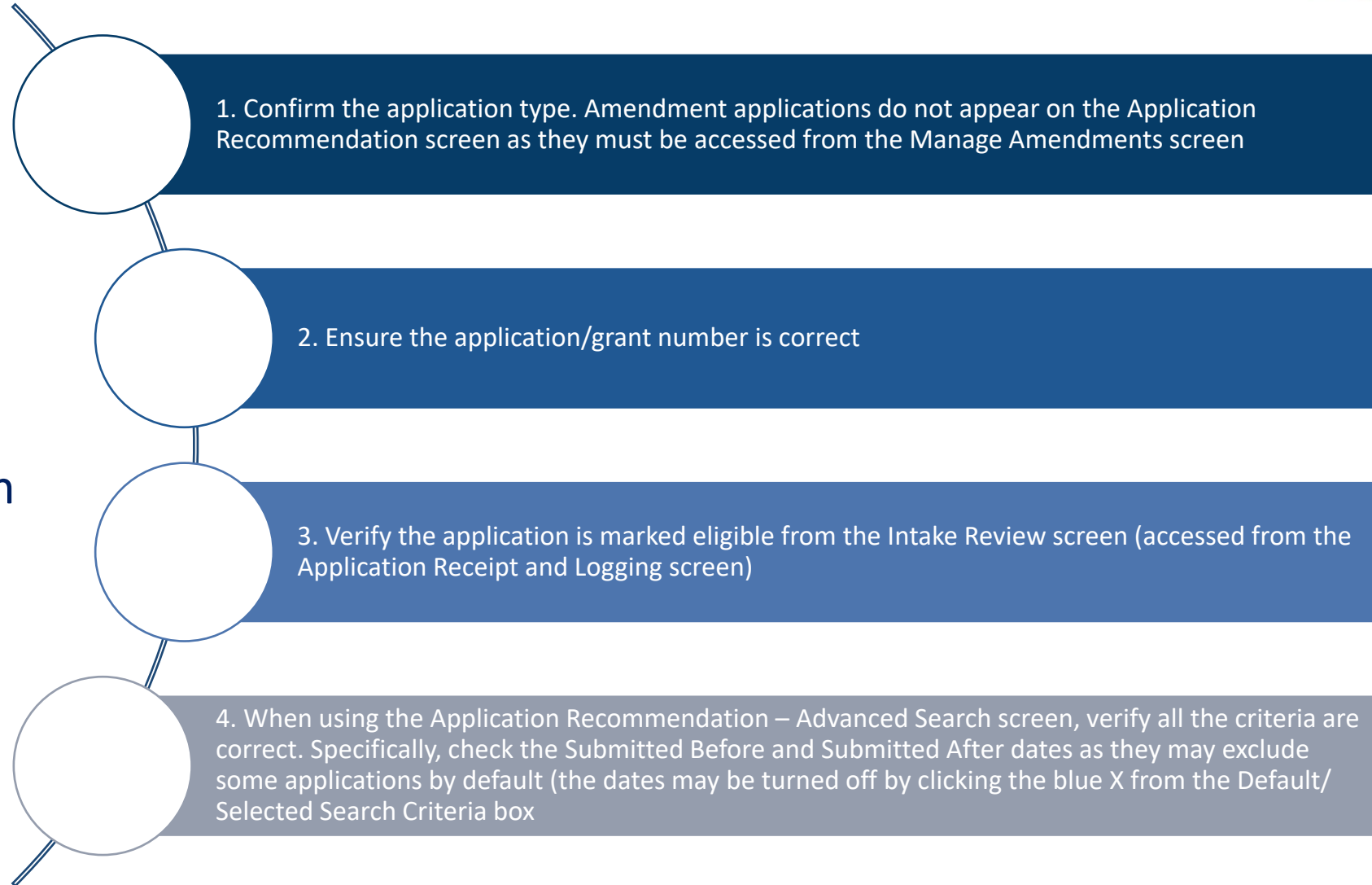
Application Number	<input type="text"/>
Grant Number or FAIN	<input type="text"/>
Organization	<input type="text"/>

**No matching records found**



I am unable to locate my application on the Application Recommendation screen. What do I do?

Check the following to try and locate applications on the Application Recommendation screen







**1. Confirm the application type. Amendment applications do not appear on the Application Recommendation screen as they must be accessed from the Manage Amendments screen**

[Page Help](#)


**Grants List**

[Advanced Search](#)

Grant Number or FAIN    
Organization    


Search within results  Search Export Results Hide Columns

1 - 1 of 1 item 50 | 100 | 150 | 200 | 1000

<input type="checkbox"/>	Program Office	Grant Program	1 ▲	Grant Number	2 ▲	Organization	Project Period Start Date 3 ▼	Project Period End Date	Project Status	Actions
<input type="checkbox"/>	+						02/01/2015	07/31/2019	Multiple Amendments In-Progress	

Add Bulk Note Manage Assignments

50 | 100 | 150 | 200 | 1000

Grant Number	2 ▲	Organization	Project Period Start3 ▼	Project Period End Date	Project Status	Actions
			09/30/2016	09/29/2021	No Amendments In-Progress	

### Manage Amendments

Grant Number  
Grantee Name  
Project Title  
Project Start Date 02/01/2015  
Project End Date 07/31/2019  
Last Issued NGA 09/14/2022 [\(View NGA\)](#)

Amendment #	Status	Submitted Date	Type	Budget Period	Funds Requested	Funds Approved	Funding Memo Required	Action
							Funding Memo Status	
	(Amendment) Approved (Processing)	09/16/2022 01:40:53 PM	Closeout by Budget Period	2 08/01/2016 - 07/31/2017	\$0.00	\$0.00	No Approved	<a href="#">View Amendment</a> <a href="#">Funding Memo</a> <a href="#">Budget Worksheet</a> <a href="#">Grant Notes</a> <a href="#">History</a> <a href="#">Send Message</a>
	(Amendment) Approved (Processing)	08/02/2022 04:02:17 PM	Closeout by Budget Period	3 08/01/2017 - 07/31/2018	\$0.00	\$0.00	No Approved	<a href="#">View Amendment</a> <a href="#">Funding Memo</a> <a href="#">Budget Worksheet</a> <a href="#">Grant Notes</a> <a href="#">History</a> <a href="#">Send Message</a>

### 3. Verify the application is marked eligible from the Intake Review screen (accessed from the Application Receipt and Logging screen)

#### Intake Review (Read Only)

\* indicates a required field.

[Application Notes](#)

Program Office

Program Name

Grant Program

Grants Servicing Office

Applicant/Grantee Name

City

State

Type of Application

Application Number

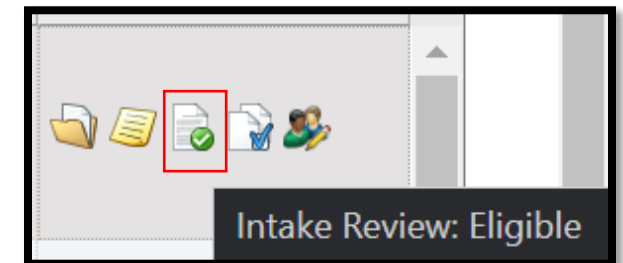
Grant Number

Year of Support

Eligibility

Is the application Eligible? \* ⓘ Yes ▾

- \* If Yes, application will continue to Program Review
- \* If No, application will continue to GMO for ineligibility signoff
- \* If In Review, application is being reviewed





# Question 5

After searching for my application on the Application Recommendation screen, I do not see where I can enter the approval (disposition) status and the approved federal/non-federal amounts. What do I do?



**Application Recommendation**

[Simple Search](#)

Submitted After

▼ Default / Selected Search Criteria

✖ Assignment Type: All Applications ✖ Intake Review Status: Eligible ✖ Submitted After: 09/12/2022 ✖ Submitted Before: 10/12/2022

Search within results     ▼

1 - 15 of 15 items 50 | 100 | 150 | 200 | 1000

<input type="checkbox"/>	Application Number	Organization	Grant Number	Announcement	Application Type	Application Status	Grant Program	Score	Recommended Decision	Close Application	Requested Non Federal Amount	Recommended Non Federal Amount	Requested Federal Amount
<input type="checkbox"/>	+			N/A	Non-Competing Continuation	Review in Progress	CI - Head Start Indian Grants	0	N/A	<input type="checkbox"/>	\$210,371.00	\$0.00	\$1,857,562

The Application Recommendation Results table is very wide. Scroll horizontally to locate the Recommended Decision, Recommended Non-Federal, and Recommended Federal columns.

### Application Recommendation

[Simple Search](#)

Submitted After

▼ Default / Selected Search Criteria

\* Assignment Type: All Applications
  Intake Review Status: Eligible
  Submitted After: 09/12/2022
  Submitted Before: 10/12/2022

Search within results     ▼

Objective Review Planning

1 - 15 of 15 items 50 | 100 | 150 | 200 | 1000 ◀ 1 ▶

<input type="checkbox"/>	Application Number	Organization	Location	Application Status	Grant Program	Score	Recommended Decision	Close Application	Requested Non Federal Amount	Recommended Non Federal Amount	Requested Federal Amount	Recommended Federal Amount	Recommended Total
<input type="checkbox"/>			Competing inuation	Review in Progress		0	N/A	<input type="checkbox"/>	\$210,371.00	\$0.00	\$1,857,562.00	\$0.00	\$0.00
<input type="checkbox"/>			Competing inuation	Review in Progress		0	N/A	<input type="checkbox"/>	\$0.00	\$0.00	\$720,034.00	\$0.00	\$0.00
<input type="checkbox"/>			Competing inuation	Review in Progress		0	N/A	<input type="checkbox"/>	\$342,131.00	\$0.00	\$1,368,522.00	\$0.00	\$0.00
<input type="checkbox"/>				Awarded		98.00	Approved	<input type="checkbox"/>	\$0.00	\$0.00	\$1,999,999.00	\$1,999,999.00	\$1,999,999.00
<input type="checkbox"/>			Competing inuation	Awarded		0	Approved	<input type="checkbox"/>	\$0.00	\$95,889.00	\$0.00	\$383,556.00	\$479,445.00
<input type="checkbox"/>				Awarded		0	Approved	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$200,000.00	\$200,000.00
<input type="checkbox"/>				Awarded		0	Approved	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$195,137.00	\$195,137.00



## Application Recommendation

[Advanced Search](#)



100 | 150 | 200 | 1000

Requested Non Federal Amount	Recommended Non Federal Amount	Requested Federal Amount	Recommended Federal Amount	Recommended Total
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

I do not see where I can type in the approved federal/non- federal amounts on the Application Recommendation screen. What do I do?



**Important:** The **Recommended Decision** must be “**Approved**” on the Application Recommendation screen in order to add amounts to the Recommended Federal and Non-Federal fields.

Application Number	Organization	Recommended Decision	Close Application	Requested Non Federal Amount	Recommended Non Federal Amount	Requested Federal Amount	Recommended Federal Amount	Recommended Total
		0 Approved	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$

If you are unable to select or save the Recommended Decision, check the following:

- Verify that you have a Program Office role in the GMM



GrantSolutions.gov ShowMe >

Grants List Funding Opportunities Applications Awards Grants Management Insight **1** System Management Online Data Collection Help/Sup

System Management > Account Management > User Roles and Assignments

Your Roles and Assignments in Grants Management

- Office Director +
- Program Authorizing Official +
- Program Authorizing Official +
- Program Office Director +
- Program Officer +

**2** Account Management

- Update Profile
- Change Password
- 3** User Roles and Assignments
- Notification Preferences



If you are unable to select or save the Recommended Decision, check the following:

- Make sure the Funding Memo is not yet created
  - To check from the Application Recommendation screen, click the blue plus sign in the first column to expand the section. Then view the Funding Memo status (it should say "N/A" to make changes to the Application Recommendation screen)

<input type="checkbox"/>	Application Number	Organization	Grant Number	Announcement	Application Type	Grant Program	Score	Recommended Decision	Close Application	Request Federal A
<input type="checkbox"/>		<a href="#">Baltimore Medical System, Inc.</a>		N/A	Non-Competing Continuation		0	Please select	<input type="checkbox"/>	

1 - 1 of 1 item 50 | 100 | 150 | 200 | 1000

<input type="checkbox"/>	Application Number	Organization	Grant Number	Announcement	Application Type	Grant Program	Score	Recommended Decision	Close Application	Request Federal A
<input type="checkbox"/>		<a href="#">Baltimore Medical System, Inc.</a>		N/A	Non-Competing Continuation		0	Please select	<input type="checkbox"/>	
			<b>Intake Review:</b> <a href="#">Eligible</a> <b>Business Review Complete:</b> <a href="#">No</a> <b>Funding Memo Status:</b> <a href="#">N/A</a> <b>Scoring Methodology:</b> N/A <a href="#">Application Notes</a> <a href="#">Project Assignments</a> <b>NGA Status:</b> N/A		<b>FAIN:</b> <a href="#">[redacted]</a> <b>Program:</b> <a href="#">[redacted]</a> <b>Grants.gov Tracking Number:</b> N/A <b>Organization (Application):</b> Baltimore Medical System, Inc. <b>Budget Period End:</b> 08/16/2022 <b>Total Requested Amount:</b> \$0.00 <b>Don't Send Notification:</b> <input type="checkbox"/> <b>Review Close Date:</b>					



## Question 7

Where do I access the Budget Worksheet for each Process (New, Non-Competing Continuation, and Amendments)?



The Program Office can access the Budget Worksheet from the following screens:

### New and Non- Competing Continuation Applications:

- Application Receipt Log Screen ->  -> Budget Worksheet 





[Page Help](#)

## Application Receipt and Logging

[Simple Search](#)











▼ Default / Selected Search Criteria

Application Type:Competing - New  \* Assignment Type:All Applications  Submitted After:08/01/2022

Submitted After  8/1/2022   


Search within results  Search Export Results Hide Columns ▼

1 - 50 of 240 items 50 | [100](#) | [150](#) | [200](#) | [1000](#)



	Submission Date	Application #	Application Type	Announcement	Grant Program	Organization	Budget Period End Date	Application Status	Actions
1	09/19/2022 12:00:00 AM		New				N/A	Awarded	    
2	<p>Other Actions:    </p> <p>Program: <span style="background-color: #ccc; display: inline-block; width: 150px; height: 1em;"></span></p> <p>Service Area: <span style="background-color: #ccc; display: inline-block; width: 150px; height: 1em;"></span></p> <p>Due Date: 08/05/2022</p> <p>Intake Review: <a href="#">Eligible</a></p> <p>Business Review Complete: <a href="#">Yes</a></p> <p>Funding Memo Status: <a href="#">Complete</a></p> <p>Submission Date: 09/19/2022 12:00:00 AM Eastern Daylight Time</p>				<p>Grant Number: <span style="background-color: #ccc; display: inline-block; width: 100px; height: 1em;"></span></p> <p>FAIN: <span style="background-color: #ccc; display: inline-block; width: 100px; height: 1em;"></span></p> <p>Organization (Application): Development Evaluation Adjustment Facilities</p>				


The Program Office can access the Budget Worksheet from the following screens:

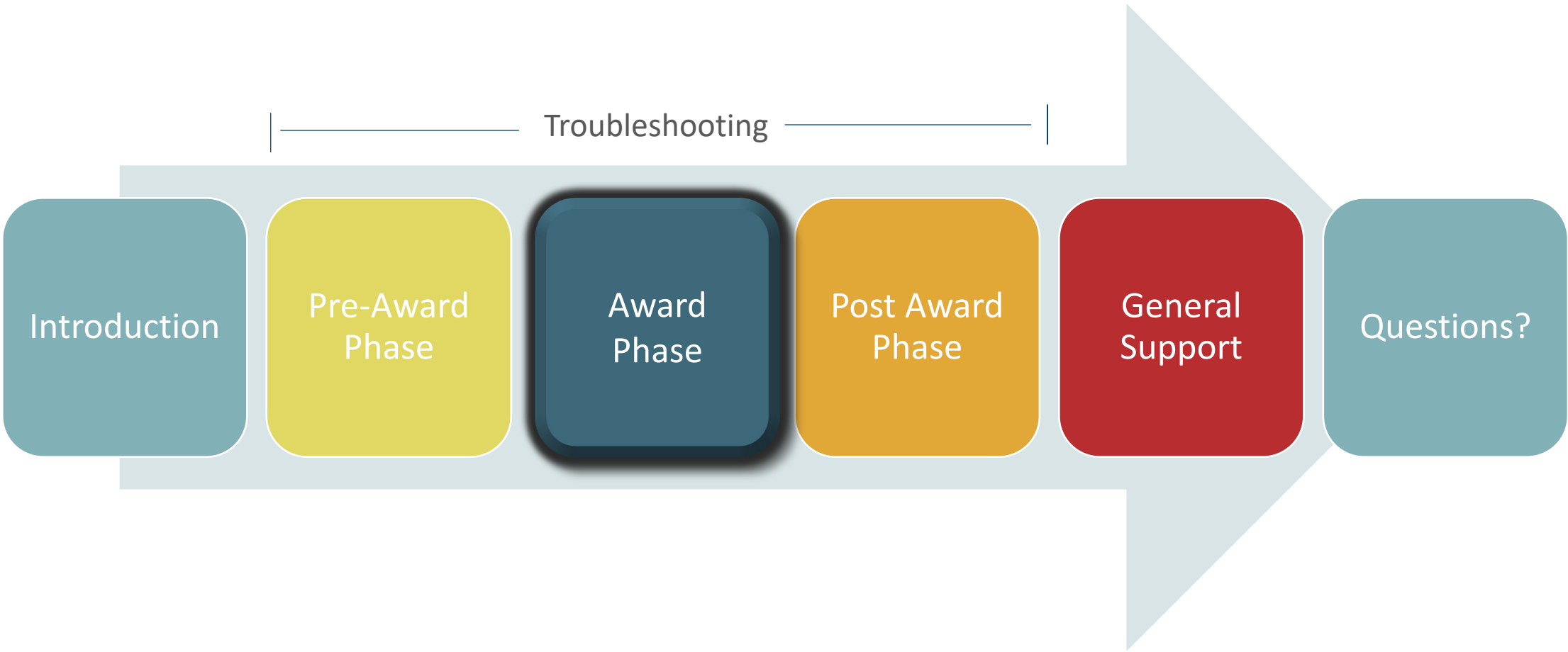
**Amendment Applications:**

- Any Amendment that is in processing will have the Budget Worksheet link in the Manage Amendment screen
  - Grants List ->  Manage Amendments

**Grants List** [Advanced Search](#)

Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
<a href="#">Louisiana Department of Health</a>	09/30/2021	09/29/2026	Amendment Approved (Processing)	 

Amendment #	Status	Submitted Date	Type	Budget Period	Funds Requested	Funds Approved	Funding Memo Required	Action
							Funding Memo Status	
AST2022001207 	(Amendment) Approved (Processing)	09/26/2022 04:00:14 PM	Change PI/PD	2 09/30/2022 - 09/29/2023	N/A	N/A	Yes Approved	<a href="#">View Amendment</a> <a href="#">Funding Memo</a> <a href="#">Set Budget Period</a> <span style="border: 2px solid red; padding: 2px;"><a href="#">Budget Worksheet</a></span> <a href="#">Grant Notes</a> <a href="#">History</a> <a href="#">Send Message</a>





How do I delete an Amendment application if the draft Notice of Award has been generated?

# Steps to Walk Back an Amendment Application

*Note: This is a generic workflow.  
Workflows are configurable by organization and grant program.*

Return or  
Delete  
Amendment  
Application

Uncomplete  
the  
Amendment  
Application

Delete the  
Funding  
Memo

Reject OR  
Disapprove &  
Reopen  
Funding Memo

Delete  
Draft  
Notice of  
Award



# Deleting the Draft Notice of Award

The Grants Office GMO or GMS must first select “Delete Notice of Award” for the application.

The screenshot displays the 'Award Overview' page with the following details:

Organization:		
Project Title:		
DUNS:	CCR EIN:	046002284
Grant Number:	Approved Amount:	\$0.00
Amendment Number:	Funds Restricted:	No
Budget period Number:	Project Period:	10/01/2017 - 09/30/2019
FAIN:	Budget Period:	10/01/2017 - 09/30/2019
Application Number:	Application Type:	Amendment ( Grant Closeout )
Workflow Status:	Last Updated By/Date:	

Below the details, there are three sections of links:

- Award Preparation:** [Edit/Validate Organization](#), [Select Org Address](#), [Project Assignments](#), [Budget Worksheet](#), [Direct Assistance Worksheet](#), [Terms and Conditions](#), [Funding Restrictions](#), [Manage Commitments](#), [Manage Project Abstract](#), [Application Notes](#), [Edit Notice of Award](#)
- Ready for Review:** [Ready for Review](#), [Delete Notice of Award](#) (highlighted with a red box)
- Award Information:** [Application](#), [Award Workflow History](#), [Next Workflow Actions](#), [Funding Memo](#), [Grant History](#), [View/Print Last Notice of Award](#), [Award Summary](#), [View/Print Notice Of Award](#), [Recipient Insight](#)

A 'Close' button is located at the bottom center of the page.

**Note:**


All attachments should be deleted before the NOA is deleted



# Rejecting the Funding Memo

Program Authorizing Official (PAO) can then “Reject” the Funding Memo.

Total Records Count: 1

Select <input type="checkbox"/>	<a href="#">Application Number / Application Type</a>	<a href="#">Grant Number / Budget Period</a>	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	NGA Status	Categories/Locale	Action
<input type="checkbox"/>	 (Amendment: Other )	Budget Period: 12			Federal: N/A Non-Federal: N/A	Approved Federal: \$0.00 Non-Federal: \$0.00  <a href="#">Next Workflow Actions</a>	Ready to Generate		<a href="#">History</a> <a href="#">Manage Commitment</a> <a href="#">Set Budget Period</a> <a href="#">View</a> <a href="#">Grant Notes</a> <a href="#">Manage Project Abstract</a> <a href="#">Project Assignments</a> <a href="#">Budget Worksheet</a>  <a href="#">Disapprove</a> <a href="#">Reject</a>

“Disapprove” puts funding memo in a holding pattern where it must be reopened by GMO.



# Disapprove and Reopen Funding Memo

These two actions are generally performed by the GMO.

Total Records Count: 1

Select <input type="checkbox"/>	<a href="#">Application Number / Application Type</a>	<a href="#">Grant Number Budget Period</a>	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	NGA Status	Categories/Locale	Action
<input type="checkbox"/>	<a href="#">(Amendment: Grant Closeout )</a>	Budget Period: 1		Central Office.	Federal: N/A Non-Federal: N/A	Approved Federal: \$0.00 Non-Federal: \$0.00  <a href="#">Next Workflow Actions</a>	Ready to Generate		<a href="#">History</a> <a href="#">Manage Commitment</a> <a href="#">Set Budget Period</a> <a href="#">View</a> <a href="#">Grant Notes</a> <a href="#">Manage Project Abstract</a> <a href="#">Project Assignments</a> <a href="#">Budget Worksheet</a> <span style="border: 2px solid red; padding: 2px;"><a href="#">Disapprove</a></span> <a href="#">Generate</a>

Total Records Count: 1

Select <input type="checkbox"/>	<a href="#">Application Number / Application Type</a>	<a href="#">Grant Number Budget Period</a>	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
<input type="checkbox"/>	<a href="#">(Amendment: Grant Closeout )</a>	Budget Period: 1		Central Office.	Federal: N/A Non-Federal: N/A	Disapproved Federal: \$0.00 Non-Federal: \$0.00  <a href="#">Next Workflow Actions</a>		<a href="#">History</a> <a href="#">Manage Commitment</a> <a href="#">Set Budget Period</a> <a href="#">View</a> <a href="#">Grant Notes</a> <a href="#">Manage Project Abstract</a> <a href="#">Project Assignments</a> <a href="#">Budget Worksheet</a> <span style="border: 2px solid red; padding: 2px;"><a href="#">Reopen</a></span>



## Deleting the Funding Memo

Program Officer (PO) has option to select “Delete”.

Total Records Count: 1


Select <input type="checkbox"/>	<a href="#">Application Number / Application Type</a>	<a href="#">Grant Number Budget Period</a>	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
<input type="checkbox"/>	(Amendment: Grant Closeout )	Budget Period: 1		Central Office.	Federal: N/A Non-Federal: N/A	Draft Federal: \$0.00 Non-Federal: \$0.00		<a href="#">Delete</a> <a href="#">Edit</a> <a href="#">History</a> <a href="#">Manage Commitment</a> <a href="#">Set Budget Period</a> <a href="#">View</a> <a href="#">Grant Notes</a> <a href="#">Manage Project Abstract</a> <a href="#">Project Assignments</a> <a href="#">Budget Worksheet</a>  <a href="#">Recommend</a>



# Uncompleted Amendment Application

The Grants Office GMO or GMS can then “Uncomplete Amendment” from the GrantSolutions Amendment Application Control Checklist screen.

[Original Submission](#)

Applicant  
Grant Number  
Application Number   
Action  
Project Title  
Submitted Date

Grant Announcement	Enclosure(s)	Attachment(s)	Status
Application Upload		3 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	✓
Additional Information to be Submitted	Enclosure(s)	Attachment(s)	Status
Miscellaneous		1 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	✓

**Post Submission Supplemental Information**

Description	<a href="#">Attachment(s): Uploaded Files</a>
No Attachments Uploaded	

**Amendment Package Status:** Complete (Post Award)

**Mail-In Package Information:** CDC Office of Financial Resources is currently not expecting to receive a Mail-In Package for this application.

**Submission Notice**



# Returning Amendment Application

The Grants Office GMO and GMS have the option to select “Return” on Manage Amendment screen.

## Manage Amendments

Grant Number

Grantee Name


Project Title

Project Start Date

Project End Date

Last Issued NGA

[\(View NGA\)](#)


Amendment #	Status	Submitted Date	Type	Budget Period	Funds Requested	Funds Approved	Funding Memo Required	Action
							Funding Memo Status	
	Submitted (Post Award)	02/28/2020 03:19:30 PM	Grant Closeout	1 10/01/2017 - 09/30/2019	N/A	N/A	No	<a href="#">View Amendment</a> <a href="#">Return</a> <a href="#">Set Budget Period</a> <a href="#">Grant Notes</a> <a href="#">History</a> <a href="#">Send Message</a>
							N/A	

Electronic  
Submission  
Icon



## Delete Amendment Application

- Federal initiated amendments allow the option to delete an amendment.
- Federal staff have the option to select “Delete Amendment” on Manage Amendment screen.

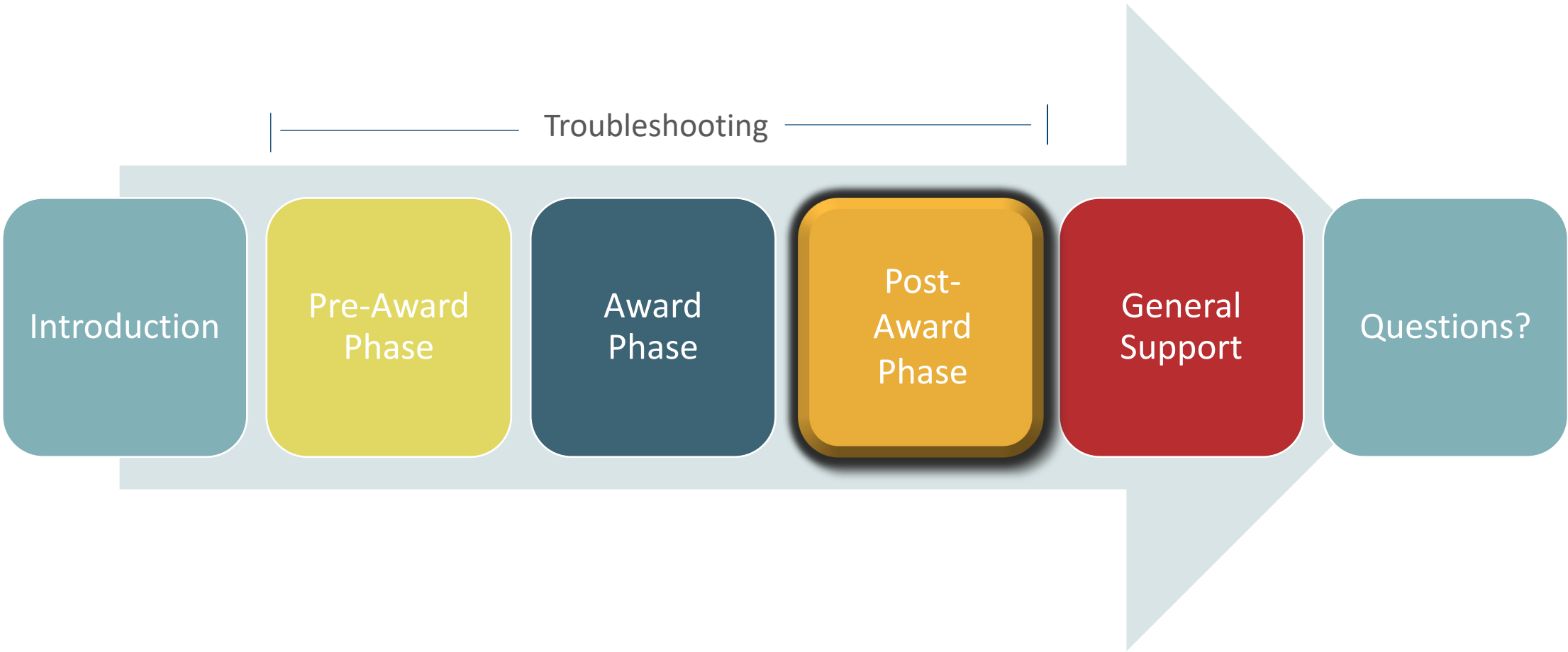
Amendment #	Status	Submitted Date	Type	Budget Period	Funds Requested	Funds Approved	Funding Memo Required	Action
							Funding Memo Status	
	Received (Post Award Paper Submission)		Grant Closeout	1 12/31/2020 - 12/30/2021	N/A	N/A	No	<a href="#">Edit Amendments</a> <a href="#">Delete Amendment</a> <a href="#">Grant Notes</a> <a href="#">History</a> <a href="#">Send Message</a> <a href="#">Set Budget Period</a>
							N/A	

Paper  
Submission  
Icon

New

Close







## Question 1






My recipient is not able to view their Notice of Award.  
How can I help?

# #1 – Check if the Award is Accepted

- Check that the Award is Accepted (Not all agencies require this step). If required by policy, verify the recipient Authorizing Official has accepted the award.

**Award Processing**

Application Number   
Award Number   
Organization    

Search within results

- 1 of 1 item [50](#) | [100](#) | [150](#) | [200](#) | [All](#)

Organization	Award Number ▲	Application Number	Application Type	Approved Amount	Budget Period Start Date	Budget Period End Date	Workflow Status	Workflow
<a href="#">State Agency</a>	<a href="#">1-100000000000000000</a>	<a href="#">1-1000000000</a>	New	\$1,000.00	04/21/2016	04/20/2017	<b>Awaiting Acceptance</b>	<a href="#">Next Workflow Actions</a>






## #2 – Check the Organization

- Ensure the recipient is assigned to the organization that received the award. You may need to check the EIN and UEI

**Grants List**

Grant Number or FAIN

Organization    

*Search within results*     ▾

1 - 39 of 39 items [50](#) | [100](#) | [150](#) | [200](#) | [1000](#)

<input type="checkbox"/>	Program Office	Grant Program	Grant Number	Organization	Project Start Date
<input type="checkbox"/>	+			<b>HEALTH, MARYLAND DEPARTMENT OF</b>	04/01/20


**Organization Information**


[Recipient Data Insights](#)

*General*

Organization Name Health, Maryland Department of

Abbreviation

DUNS 


**UEI **

**EIN**

Organization Level Grantee

Organization Level Grantee

Fpar Number 0302

Organization Type 

Parent Organization Name

Organization ID 6312



## #3 – Check Project Assignments

- Recipients with the role *Principal Investigator/Program Director (PI/PD)* must be assigned to the grant for it to appear on their “My Grants List” screen. Check to see if the recipient has the project assignment. If they do not and need to be assigned, contact the Grant Office to make the assignment.

**Note:** An organization’s Authorizing Official can view grants across their organization without a specific grant assignment.

**Grants List**

**Project Assignments**

Organization: [Redacted]  
Grant Number: [Redacted] DUNS: 143148679 UEI: [Redacted]  
Display:  All Users  Grantees  Grantors

Active Assignments | New Assignments | Expired Assignments

Assigned	Name / Email	Username	Role	Primary	Start Date	End Date	Add
<input checked="" type="checkbox"/>	[Redacted]	[Redacted]	Grantee Principal Investigator / Program Director	<input checked="" type="checkbox"/>	03/22/2019		
<input checked="" type="checkbox"/>	[Redacted]	[Redacted]	Grantee Administrative Official / Grantee Authorized Representative	<input checked="" type="checkbox"/>	03/22/2019		

**Grants List**

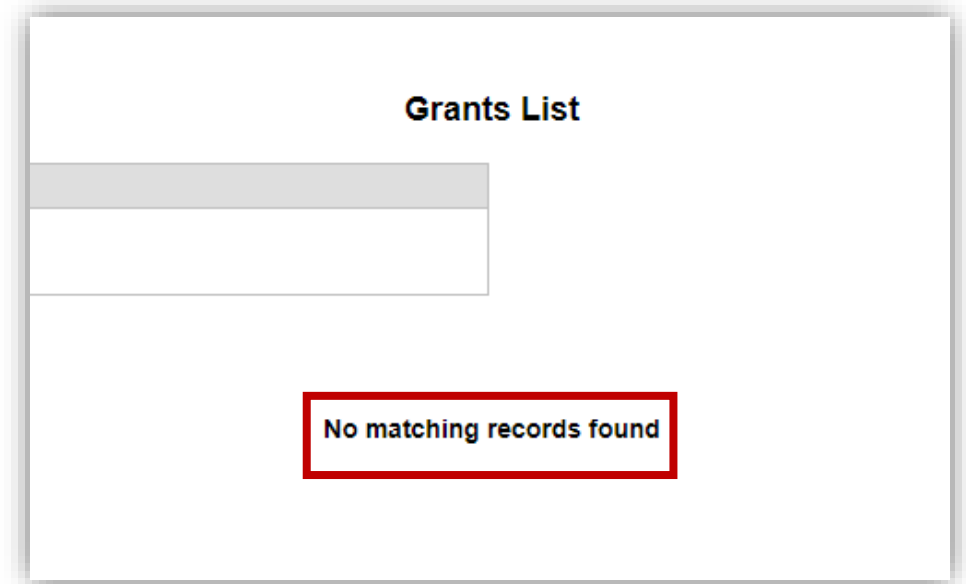
Project Period Start Date	Project Period End Date	Project Status	Actions
4/01/2019	03/31/2022	No Amendments In-Progress	[Redacted] <b>1</b>





## Question 2

I am unable to locate the grant that I am searching for from the Grants List screen.  
What do I do?



**Important:** Ensure you are looking for an awarded grant.

Applications that are processing but have not yet been awarded are not located on the Grants List screen.

To locate an awarded grant from the Grants List screen, check the following:

### Simple Search Criteria

- Enter at least 3 characters of the award number in the Grant Number field and click the Search icon (do not enter an application number).

GrantSolutions.gov ShowMe >

Grants List Funding Opportunities Applications Awards Grants Management Insight System Management Online Data Collection Help/Support

Page Help

### Grants List

Advanced Search

Grant Number or FAIN: 01 (Field must contain at least 3 characters)

Organization: [Empty]

Search within results Search Export Results Hide Columns

1 - 50 of 89 items 50 | 100 | 150 | 200 | 1000

	Program Office	Grant Program	1 ▲ Grant Number	2 ▲ Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
--	----------------	---------------	------------------	------------------	---------------------------	-------------------------	----------------	---------



## Simple Search Criteria

- Enter at least 3 characters of the recipient organization name in the Organization field. Click the Search icon.

**Note:** Entering partial search criteria may return several results.

GrantSolutions.gov ShowMe >




Grants List Funding Opportunities Applications Awards Grants Management Insight System Management Online Data Collection Help/Support

Page Help

### Grants List







Advanced Search

Grant Number or FAIN

Organization    

Search within results Search Export Results Hide Columns

1 - 12 of 12 items 50 | 100 | 150 | 200 | 1000

<input type="checkbox"/>	Program Office	Grant Program	1 ▲	Grant Number	2 ▲	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
<input type="checkbox"/>						<a href="#">Johns Hopkins University, The</a>	04/01/2005	12/31/2007	Closed	     



To locate an awarded grant from the Grants List screen, check the following:

### Advanced Search Criteria

- From the Grants List Advanced Search screen, change the Assignment Type from My Grants to All Grants. My Grants only returns grants to which you have received the Project Assignment.
- Modify the search criteria to ensure the parameters are not too narrow.
- Check all criteria to make sure they are correct.

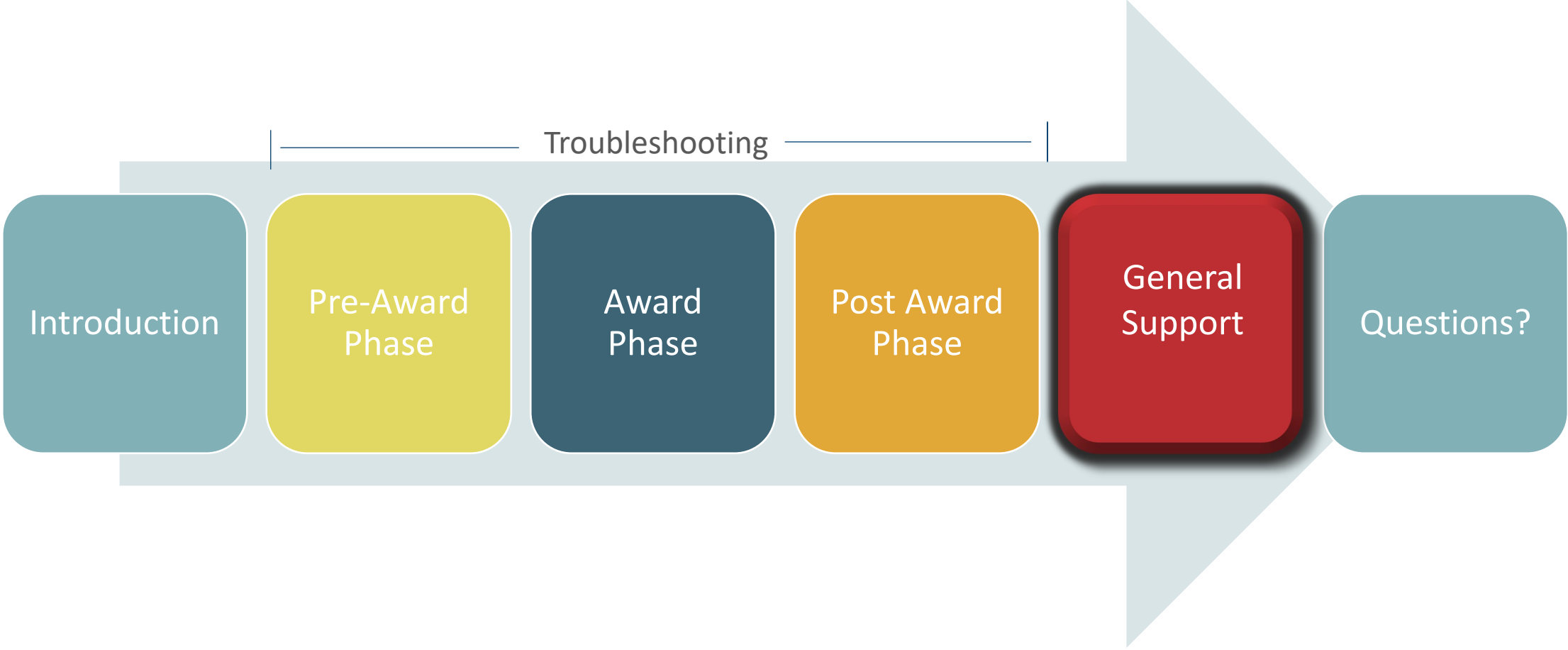
The screenshot shows the GrantSolutions.gov interface. The navigation bar includes links for Grants List, Funding Opportunities, Applications, Awards, Grants Management, Insight, System Management, Online Data Collection, and Help/Support. The main heading is "Grants List".

Search criteria are displayed in a box with a red border, showing: **\* Expired/Active:Active Projects Only** and **\* Assignment Type:All Grants**. To the right, the "Assignment Type" dropdown is set to "All Grants".

Below the search criteria, there are buttons for "Search within results", "Search", "Export Results", and "Hide Columns". The table shows 1 - 22 of 22 items. The table columns are: Program Office, Grant Program, Grant Number, Organization, Project Period Start Date, Project Period End Date, Project Status, and Actions.

	Program Office	Grant Program	Grant Number	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
<input type="checkbox"/>				<a href="#">Southern Methodist University</a>	10/01/2018	09/30/2023	Multiple Amendments In-Progress	
<input type="checkbox"/>				<a href="#">George Mason University</a>	10/01/2018	09/30/2023	No Amendments In-Progress	

If you are still unable to locate the grant, please contact the help desk for assistance.

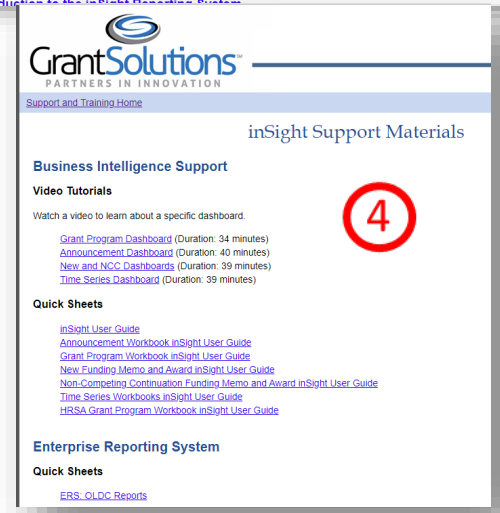
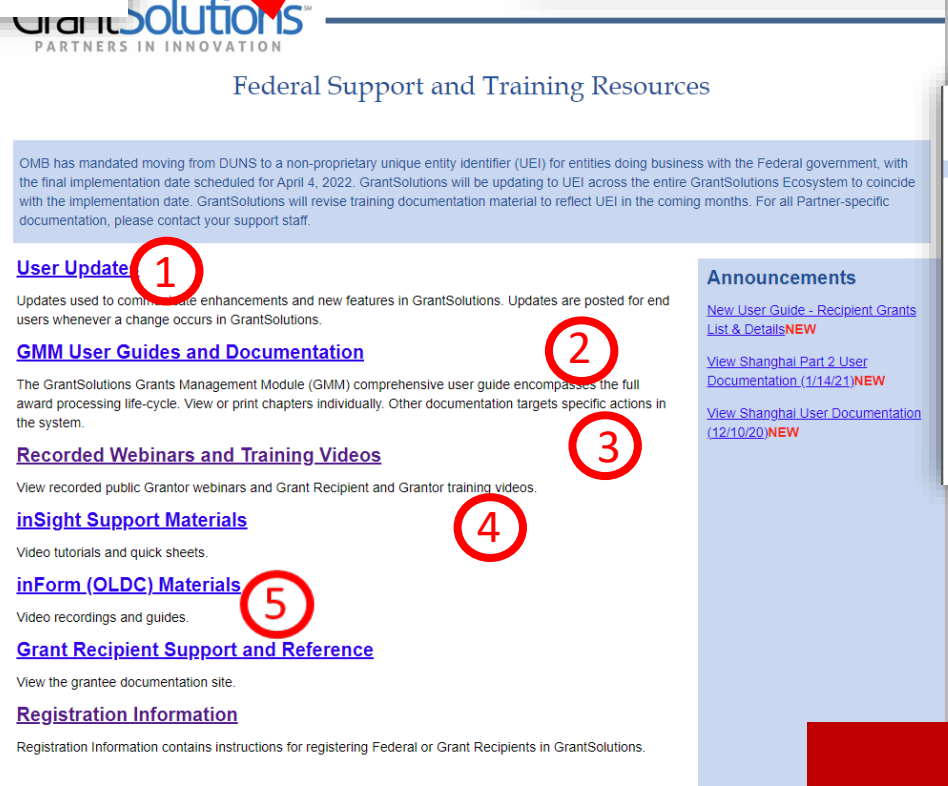
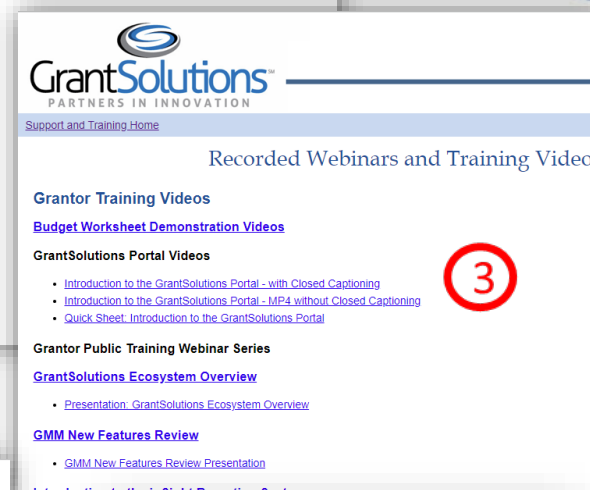
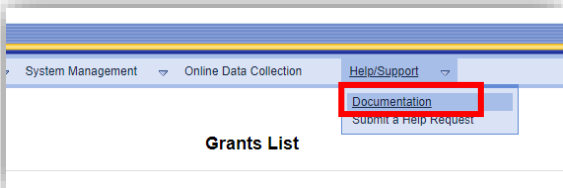




## Question 1



How do I find Program Office specific documentation, videos and recipient support documents and training videos?



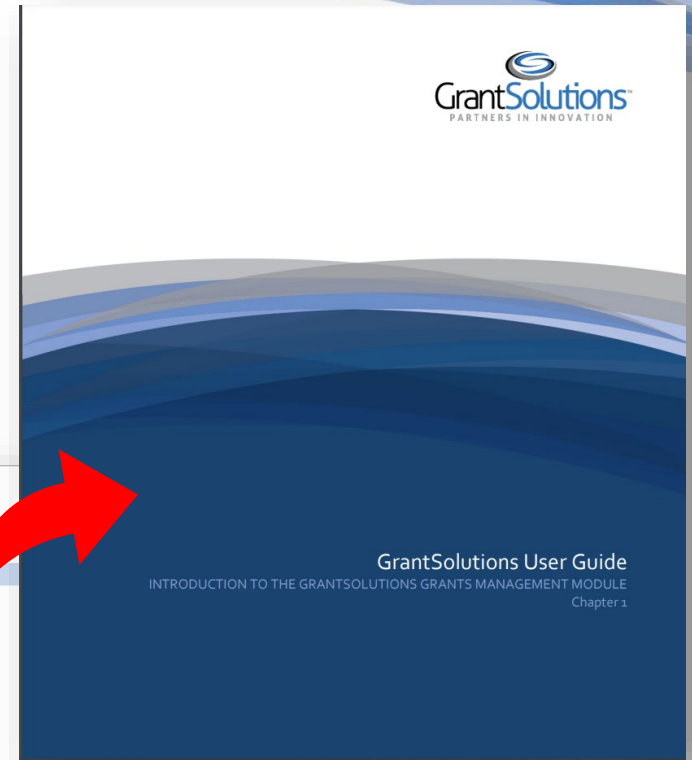
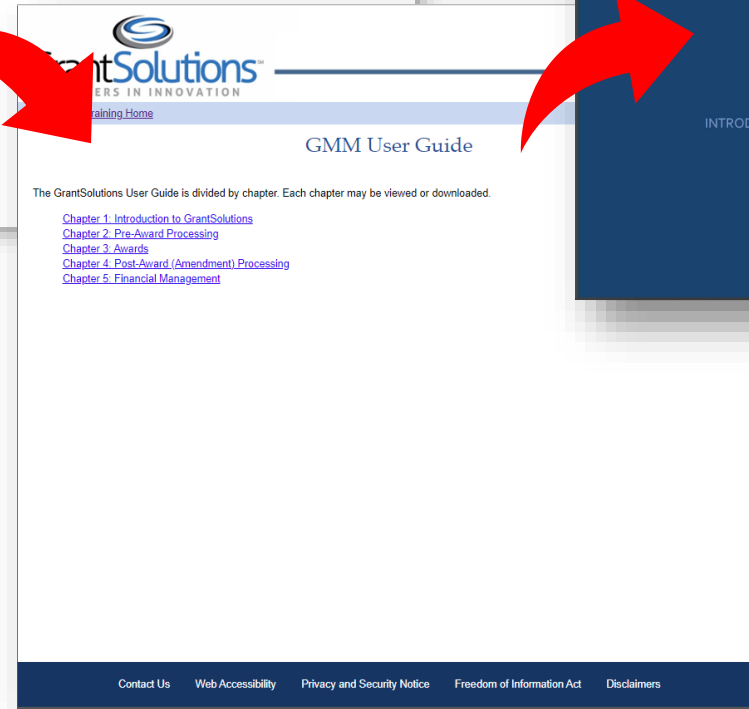
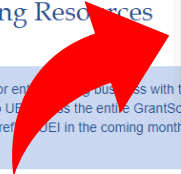
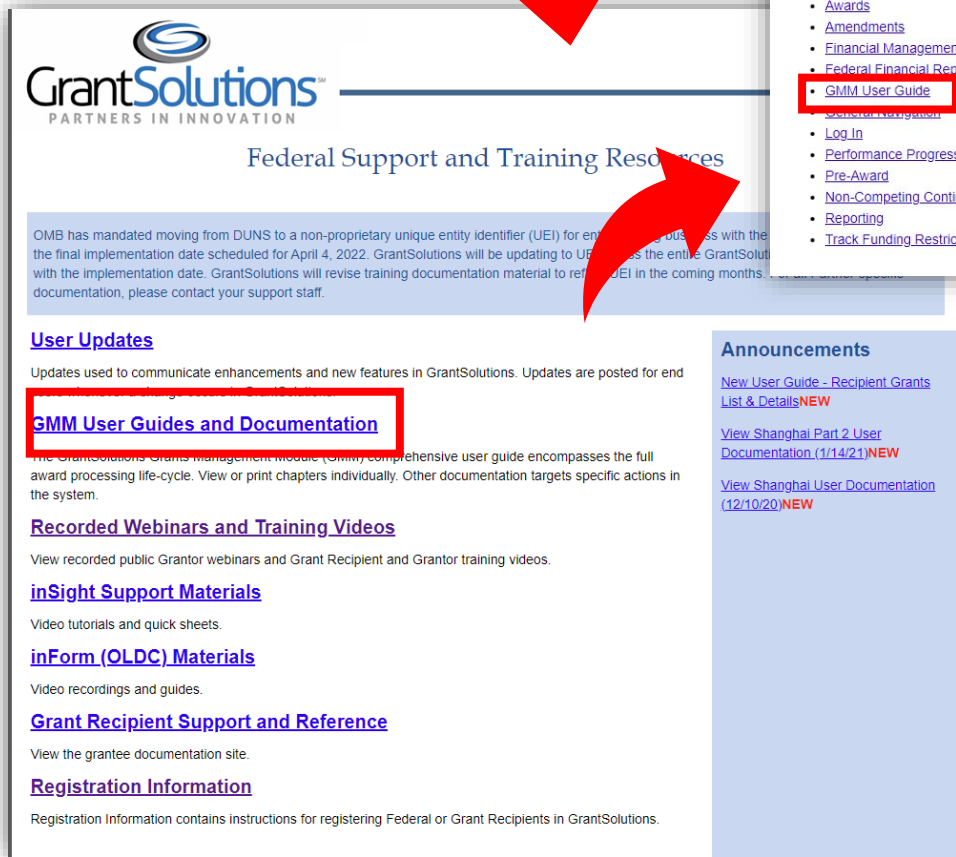
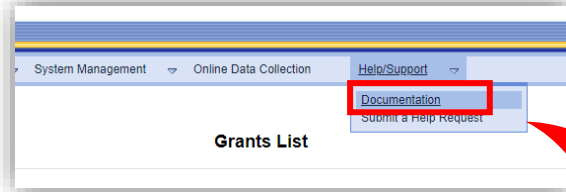
Login

Help/Support Tab

Documentation

GMM User Guides and Documentation

GMM User Guides and Documentation



Answer 1 (2 of 3)

General Support

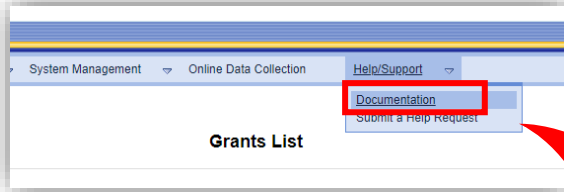


Login

Help/Support  
Tab

Documentation

Grant Recipient  
Support and  
Reference



## Federal Support and Training Resources

OMB has mandated moving from DUNS to a non-proprietary unique entity identifier (UEI) for entities doing business with the Federal government, with the final implementation date scheduled for April 4, 2022. GrantSolutions will be updating to UEI across the entire GrantSolutions Ecosystem to coincide with the implementation date. GrantSolutions will revise training documentation material to reflect UEI in the coming months. For all Partner-specific documentation, please contact your support staff.

### User Updates

Updates used to communicate enhancements and new features in GrantSolutions. Updates are posted for end users whenever a change occurs in GrantSolutions.

### GMM User Guides and Documentation

The GrantSolutions Grants Management Module (GMM) comprehensive user guide encompasses the full award processing life-cycle. View or print chapters individually. Other documentation targets specific actions in the system.

### Recorded Webinars and Training Videos

View recorded public Grantor webinars and Grant Recipient and Grantor training videos.

### inSight Support Materials

Video tutorials and quick sheets.

### inForm (OLDC) Materials

Video recordings and guides.

### Grant Recipient Support and Reference

Training guides and documentation.

### Registration Information

Registration Information contains instructions for registering Federal or Grant Recipients in GrantSolutions.

### Announcements

[New User Guide - Recipient Grants List & Details](#)**NEW**

[View Shanghai Part 2 User Documentation \(1/14/21\)](#)**NEW**

[View Shanghai User Documentation \(12/10/20\)](#)**NEW**

ie/grant-recipient-support-and-reference/



ABOUT BENEFITS SERVICES RISK MANAGEMENT PARTNERS NEWS LOGIN

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The Grants Management Services (GMM) training resources help walk you through key stages of the grant process, including application submission, revision request, and official correspondence tracking.

GMM TRAINING RESOURCES



Struggling to find what you are looking for? Need help with a certain task? Access frequently asked questions through the button below.

FREQUENTLY ASKED QUESTIONS

The Online Data Collection (OLDC) training resources help you learn how to submit progress and performance reporting requirements.

OLDC TRAINING RESOURCES

Answer 1 (3 of 3)

General Support

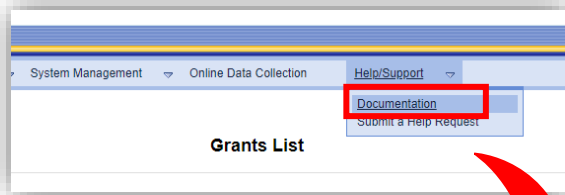




## Question 2

How do I find user account request forms from the documentation site?





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View the grantee documentation site.

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[New User Guide - Recipient Grants List & Details](#) **NEW**

[View Shanghai Part 2 User Documentation \(1/14/21\)](#) **NEW**

[View Shanghai User Documentation \(12/10/20\)](#) **NEW**

GrantSolutions PARTNERS IN INNOVATION

ABOUT BENEFITS SERVICES RISK MANAGEMENT PARTNERS NEWS LOGIN

## Getting Started – Request A User Account

### GrantSolutions Paper Registration

#### Federal User

All new account requests must be made by the prospective user's Supervisor or other Authorized Official.

- The prospective user must complete and sign the first section of the [Federal User Account Request Form](#).
- The prospective user 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 Authorized Official complete the authorizing section by verifying the Government HSPD-12 Identification Card (PIV) card
- The Prospective User's Supervisor or Authorizing Official should email all required documents to the GrantSolutions Help Desk at [help@grantsolutions.gov](mailto:help@grantsolutions.gov). 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 (866) 577-0771.

#### Recipient User

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

- The requester must complete and sign the first section of the [Recipient User Account Request Form](#).

#### Frequently Asked Questions

Find answers to our most frequently asked questions.

[FAQS](#)

GrantSolutions PARTNERS IN INNOVATION

[Print Form](#)

### Federal User Account Request Form

Please use this form to request the following GrantSolutions Federal user account actions:

#### Create New User Account

The new user's Supervisor or Authorized Partner/Agency Official must make all account requests.

- The user must complete and sign Part 2 of the Federal User Account Request Form
- The user who will be receiving access must:
  - Sign and date Part 1 of the form (Rules of Behavior)
  - Provide Government HSPD-12 Identification Card (PIV) Number

#### Create a Recipient Data Insights (RDI) Only User Account

- Sign and date Part 1 of the form (Rules of Behavior) on page 5
- In Part 2 (page 6): select New Account, enter Partner/Agency, check Recipient Data Insights (RDI) under GrantSolutions Modules, and then have supervisor sign and submit the form.

#### Update Existing User Account

Should any information regarding an existing Federal user account change, please select "Request Type: Account Change" and complete the form in its entirety. Changes to existing accounts may include:

- Change of user's role (and reason for the change)
- Update of user's contact information

#### Close Existing User Account

Should a user's account need to be closed to no longer be active, the user's Supervisor or Authorized Official must select "Request Type: Account Closure" and sign the bottom of the form. Additionally, the user's Supervisor or Authorized Official can send an email requesting closure to [help@grantsolutions.gov](mailto:help@grantsolutions.gov).

#### Submission of the User Account Request Form

The Supervisor or Authorized Partner/Agency Official must request and authorize account changes (role changes, account closures, etc.). The GrantSolutions Support Center will verify all account requests as needed.

#### Limiting User Access

Any limitation to a user's existing access rights (privileges) must be defined below. This is usually done when limiting access to certain grant programs is required. In some cases, this can be done on a grant by grant basis. Please describe any special situations below or contact the GrantSolutions Support Center for help.





What are the best browsers to use for GMM?

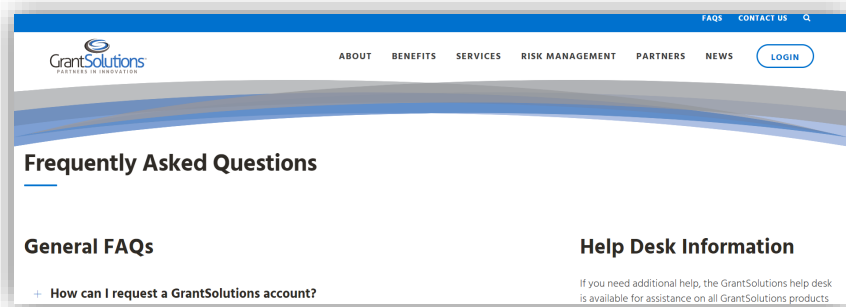
Microsoft Edge

Safari

chrome

mozilla  
**Firefox**





Note: This information may change, so please refer back to the FAQ page for updates.

### — Which web browsers are supported by GrantSolutions?

The latest versions Mozilla Firefox, Google Chrome, Safari, and Microsoft Edge are supported for use with GrantSolutions. However, these web browsers undergo frequent changes and updates, so it is recommended you have the latest version when using GrantSolutions. Legacy versions of these web browsers may be functional, but you may experience issues.

\*As originally [announced by Microsoft](#), support of Internet Explorer 11 (IE) has been discontinued for Microsoft 365 applications and services on August 17, 2021.

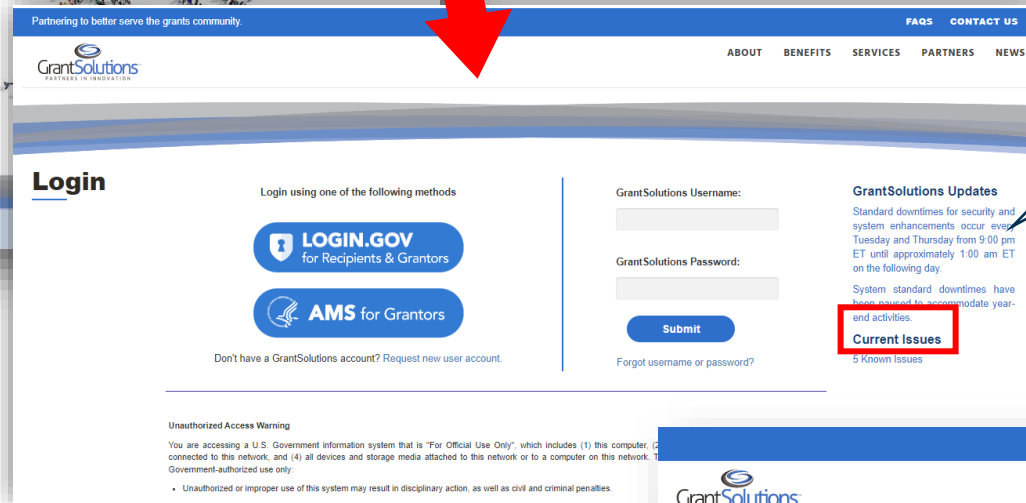
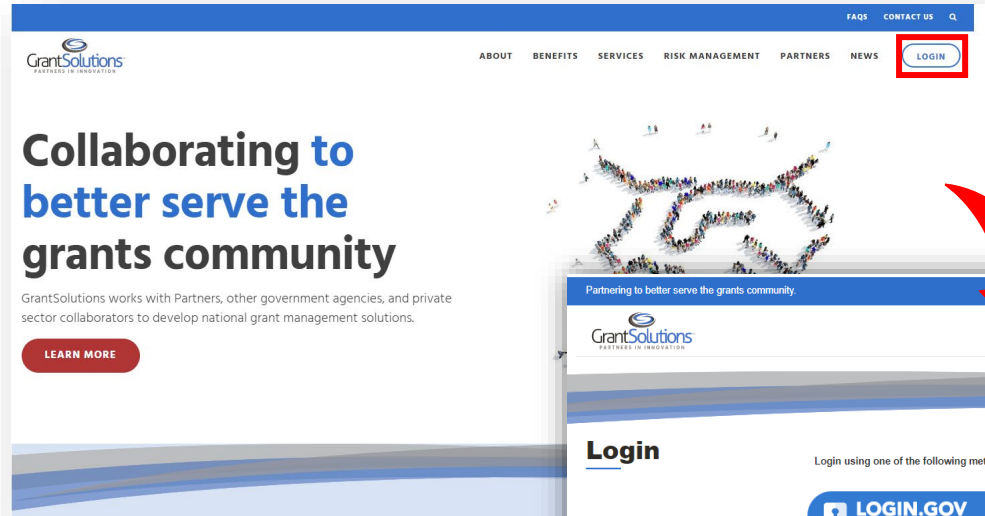




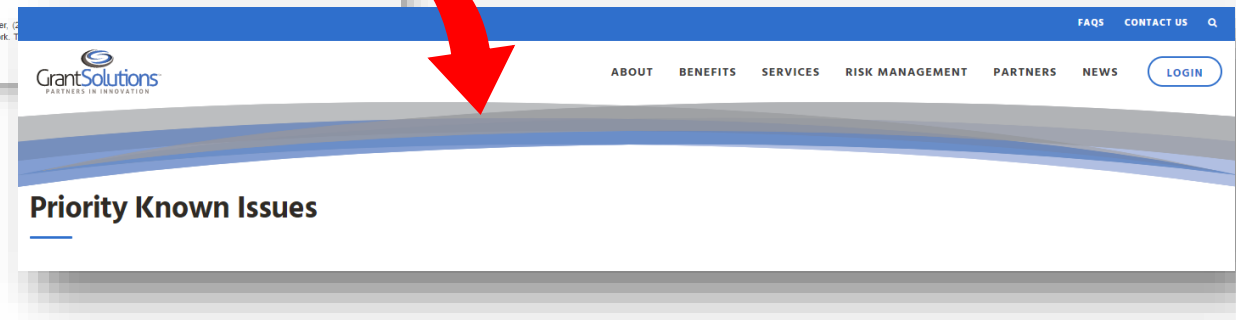
## Question 4

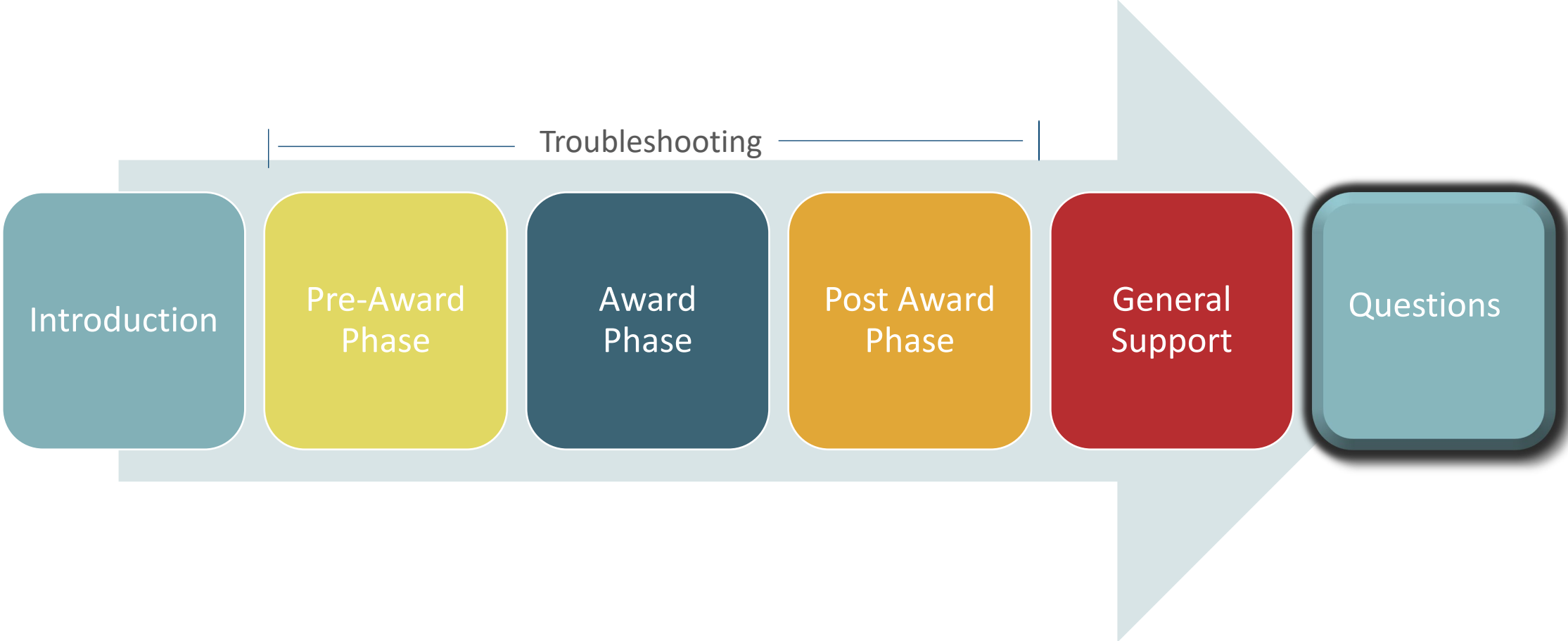
How can I see  
all of the known  
issues?





**GrantSolutions Updates**  
Standard downtimes for security and system enhancements occur every Tuesday and Thursday from 9:00 pm ET until approximately 1:00 am ET on the following day.





*Please contact your Partner Services representative for questions regarding your organization's specific workflow.*

