

Quick Sheet: Grant Notes

Audience: Grant Recipients

PURPOSE

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


STEPS

To view or add a Grant Note:

1. Log in to GrantSolutions.
2. The “My Grants List” screen appears. Locate the desired grant in which to add the note and click the **Grant Notes** link.

My Grants List

The COE Training Center [Show Expired Grants](#)

Grant Number:	90FO0012-01-00	View NGA
Grant Program:	FO - Fatherhood Reentry	Grant Notes
Program Office:	The Office of Family Assistance	History
Project Title:	Responsible Fatherhood Opportunities for Reentry and Mobility - 2015	Manage Amendments
Award Issue Date: 	11/12/2015	

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 (populates with previously used categories)
- Author: Name of user that created the Grant Note
- Subject: Grant Note subject

Grant Notes

Grant Number	Grant Information	90FO0012
Grantee Name		The COE Training Center
Project Start Date		10/30/2015
Project End Date		10/29/2020

Grant Note Create Date	From	<input type="text"/>	To	<input type="text"/>
Grant Note Type		--All--		
Grant Note Category		--All--		
Author		--All--		
Subject		<input type="text"/>		
Hide Automatic Notes		<input checked="" type="checkbox"/>		

Search for Notes

4. To add a new note, scroll down 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	<input type="text"/>	To	<input type="text"/>
Grant Note Type		--All--		
Grant Note Category		--All--		
Author		--All--		
Subject	<input type="text"/>			
Hide Automatic Notes	<input type="checkbox"/>			

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 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 *

Note Type * Correspondence

Category Type *

Notes *
(Limit to 2000 characters)

Note Attachments

Author: Anna-Lisa Walters-grantee

Description:

File to Upload: No file chosen

Description	Source Attachments	Status	Actions
Training Note	Budget.docx	SUCCESSFUL	




* Status updates every 10 seconds

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

When the automatically generated email notification is sent to the assigned Principal Investigator/Program Director and Grantee Authorizing Official, the Grant Note is not contained in the body of the email. The user must log into the GrantSolutions GMM to view the Grant Note.

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

Total 1 notes 1

Subject	Category	Grant Note Type	Author	Date	Support Year	Application Number	Bulk Notes	Action
Training Note	Other	Correspondence	Anna-Lisa Walters-grantee	11/13/2015 09:26 (GMT -04:56) EST	1	FO2015000369 90FO0012	No	   Edit Note Delete Note View Note

- Click the **Cancel** button to close the window and return to the “My Grants List” screen.

Total 1 notes 1

Subject	Category	Grant Note Type	Author	Date	Support Year	Application Number	Bulk Notes	Action
Training Note	Other	Correspondence	Anna-Lisa Walters-grantee	11/13/2015 09:26 (GMT -04:56) EST	1	FO2015000369 90FO0012	No	