

GrantSolutions Grants Management Module (GMM)

Spring User Group 2021
Common Questions and Resolutions
May 2021

Introductions

- Torin Savoy, Technical Support Team Manager
- Abby Walker, Partner Account Director

Setting the Stage

This breakout session IS:

- An opportunity to review the most commonly-asked questions about the Grants Management Module (GMM) and their resolutions

This breakout session is NOT:

- A training session on GMM
- A platform to discuss partner-specific issues
For partner-specific issues or training, please reach out to your Partner Services support team
- General questions submitted during registration will be discussed today.
- Partner-specific questions have been sent to your Partner Services team to address individually.

Covered Topics



Troubleshoot Common Pre-Award Issues



Troubleshoot Common Award Issues



Troubleshoot Common Post-Award Issues

Agenda

- Introduction
- Common Questions and Issues: Pre-Award
 - Return Button Missing on the Application Control Checklist screen
 - Change the Amount on the Application Recommendation Screen After the Funding Memo is Created
 - Application Does Not Appear on Funding Memo Screen
 - Upload Additional Documents on Behalf of the Applicant/Recipient
- Common Questions and Issues: Award
 - Create the Draft Notice of Award When the “Generate” link does not Display
 - Resolving “Amount Awarded This Action” Error
- Common Questions and Issues: Post-Award
 - Advanced Searching on the Grants List Screen
 - Assist Recipients with Viewing their Notice of Award
 - Assigning Recipient Roles and Other Project Assignment Tips
- Resources



Common Questions and Issues

Pre-Award

Common Questions and Issues: Pre-Award

- **Question:** I am a Grantor and I want to return a new application to the applicant for changes. However, when I go to the *Application Control Checklist* screen, there is no Return button. What can I do?

Print Application:
[Original Submission](#)

Applicant	
Application Number	
Program	
Announcement	
Service Area	Entire US
Project Title	
Due Date	06/25/2011 12:00 AM (GMT - 05:00) Eastern Time (US & Canada)
Submitted Date	05/03/2021 12:00 AM Eastern Time

Grant Announcement	Enclosure(s)	Attachment(s)	Status
	View PDF View Original Version	N/A	
Online Forms	Enclosure(s)	Attachment(s)	Status
SF-424A Budget Information - Non-Construction	Enter Online	N/A	
SF-LLL Disclosure of Lobbying Activities	Enter Online	N/A	
Key Personnel	Enter Online	N/A	
SF-424 Application for Federal Assistance Version 2	Enter Online Enter Comments	0 Uploaded Files 0 Mail-in Items	
Additional Information to be Submitted	Enclosure(s)	Attachment(s)	Status
Miscellaneous Information	Enter Comments	0 Uploaded Files 0 Mail-in Items	

Application Package Status:

[Application Notes](#) [Verify Submission](#) [Close](#)

System Roles to Resolve Issue: GMS and GMO

Screenshot showing application in a status that prevents the user from returning it to the recipient.




Common Questions and Issues: Pre-Award

- **What to Check:**

- ☐ Was the application submitted in Grants.gov or GMM? Only applications submitted in GMM can be returned to the applicant for changes.
- ☐ Do I have the correct role to return an application? I will need the GMO or GMS role.
- ☐ What is the application status? In order to return a new application, it must be in the Submitted status.
- ☐ Has the announcement due date passed? If so, the announcement can be unposted, the due date updated, and reposted. This will allow the Grantor to return the application, and as long as the due date has not passed, the applicant can resubmit.

System Roles to Resolve Issue: GMS and GMO

Common Questions and Issues: Pre-Award

- From the *Application Receipt and Logging* screen, use the application icons to determine how an application was submitted.
 - Submitted via Grants.gov 
 - Submitted Electronically in GrantSolutions GMM 
 - Submitted by Paper (Added by the Grantor) 

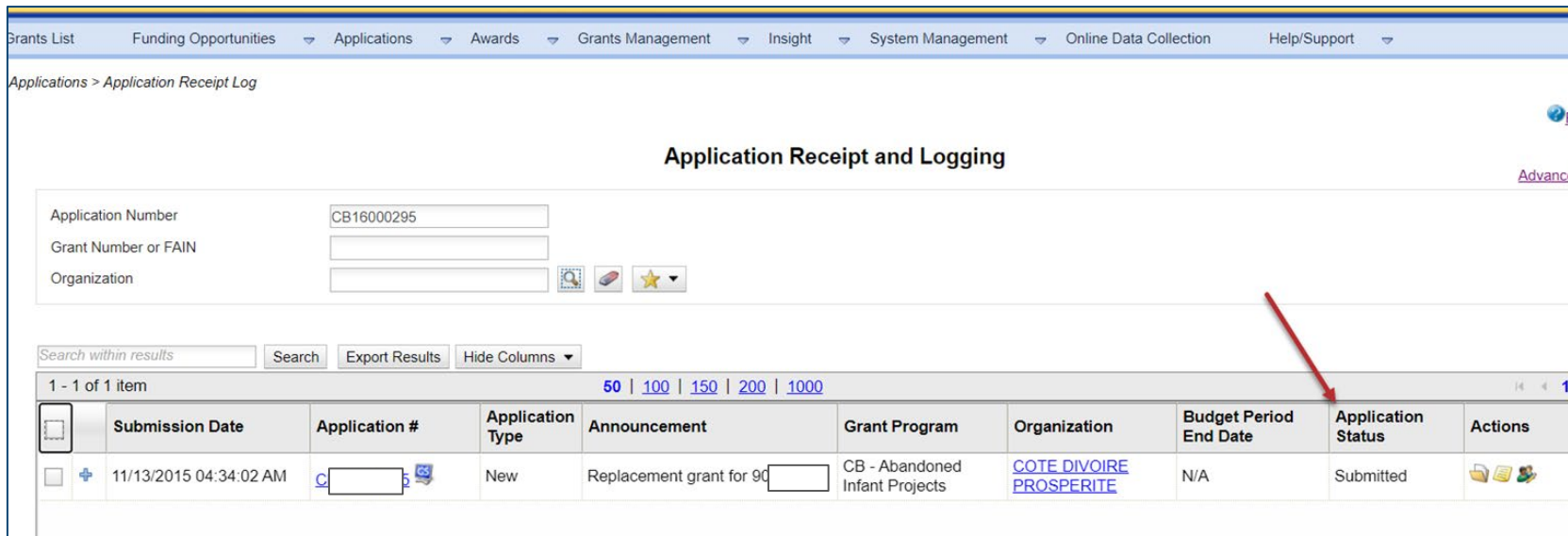
Common Questions and Issues: Pre-Award

- Check your GrantSolutions GMM roles and assignments from the *User Roles and Assignments* screen.
 - From the menu bar, select **System Management > Account Management > User Roles and Assignments**.

The screenshot displays the GrantSolutions GMM interface. At the top is a horizontal menu bar with the following items: Grants List, Funding Opportunities, Applications, Awards, Grants Management, Insight, System Management, Online Data Collection, and Help/Support. The 'System Management' item is selected, and a dropdown menu is visible. This dropdown menu contains the following options: Search Preferences, Account Management, Staff Assignments, Data Reference, Partner Award Letter, and Project Assignments (Beta). The 'Account Management' option is selected, and a second dropdown menu is visible. This second dropdown menu contains the following options: Update Profile, Change Password, User Roles and Assignments, and Notification Preferences. The 'User Roles and Assignments' option is highlighted. Below the menu bar, the breadcrumb trail reads: *System Management > Account Management > User Roles and Assignments*. The main content area displays the heading 'Your Roles and Assignments in Grants Management' and the text 'Grants Support Staff' followed by a plus icon.

Common Questions and Issues: Pre-Award

- Check an application's status from the Application Receipt and Logging screen.
 - From the menu bar, select **Applications > Application Receipt Log**.
 - Search for the application.
 - The application status is in the Results table's Application Status column.



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




Applications > Application Receipt Log

Application Receipt and Logging

Application Number: CB16000295
Grant Number or FAIN:
Organization:

Search within results Search Export Results Hide Columns

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

	Submission Date	Application #	Application Type	Announcement	Grant Program	Organization	Budget Period End Date	Application Status	Actions
<input type="checkbox"/>	11/13/2015 04:34:02 AM	C [redacted]	New	Replacement grant for 90 [redacted]	CB - Abandoned Infant Projects	COTE DIVOIRE PROSPERITE	N/A	Submitted	  

Bonus tip!

If the Application Status column does not display in the Results table, from the Simple Search view, select the Hide Columns button and turn on the Application Status column.

Common Questions and Issues: Pre-Award

- Grantors can extend the application due date by unposting the announcement, changing the date, and reposting.
 - From the menu bar, select **Funding Opportunities > Announcements > Manage Announcements**.
 - Search for the Announcement.
 - Select the Unpost Announcement hyperlink from the Action column.

Items: 1								
Internal)	Competition ID / Funding Opportunity Number	CFDA	Publish Date	Due Date	Program	Program Office	Status	Action
ment	F F	15.615	02/06/2020	05/30/2020	FISH AND WILDLIFE SERVICES	FISH AND WILDLIFE SERVICE - ACQUISITION MANAGEMENT DIVISION	Posted	View Unpost Preview View App Kit

Common Questions and Issues: Pre-Award

- **Question:** I need to change the amount on the *Application Recommendation* screen, but the *Funding Memo* is already in the approval process. What do I need to do?
- **What to do:**
 - ❑ In order to make changes to the *Application Recommendation* screen, the *Funding Memo* must first be deleted.
 - ❑ Use the **Next Workflow Actions** link from the *Funding Memo* screen to determine which official can send it back in the process.
 - ❑ If the *Funding Memo* is already in the approval process, contact the Authorizing Official to have them reject and then delete the *Funding Memo*.

System Roles to Resolve Issue: GMS, GMO, PC, OD, DAO, PAO

Common Questions and Issues: Pre-Award

- Use the **Next Workflow Actions** link from the *Funding Memo* screen to determine which official can send it back in the process.
 - Navigate to **Applications > Funding Memo**.
 - Search for the application.
 - From the Results table Memo Status column, select the **Next Workflow Actions** hyperlink.

Coordinator Review Deputy Review Director Review

Next Workflow Actions for Application Number: CESU-P202000001

Possible workflow transitions include: **Reject, Generate, Disapprove**

Reject can be performed by the following **Grants Management Officer:**

P Carter, Andrea	ZPFAAGO1@ios.doi.gov
InstructorGMO-001, I	ZMFAAGO1@ios.doi.gov
InstructorGMO-002, I	ZMFAAGO1@ios.doi.gov
InstructorGMO-003, I	ZMFAAGO1@ios.doi.gov
nstructorGMO-001, I	ZPFAAGO1@ios.doi.gov
nstructorGMO-002, I	ZPFAAGO1@ios.doi.gov
nstructorGMO-003, I	ZPFAAGO1@ios.doi.gov
nstructorGMO-004, I	ZPFAAGO1@ios.doi.gov
nstructorGMO-005, I	ZPFAAGO1@ios.doi.gov
nstructorGMO-006, I	ZPFAAGO1@ios.doi.gov
Ranson, Adam	adam.ranson@acf.hhs.gov
T-GMO-001, A	ZPFAAGO1@ios.doi.gov
T-GMO-002, A	ZPFAAGO1@ios.doi.gov
T-GMO-003, A	ZPFAAGO1@ios.doi.gov
T-GMO-004, A	ZPFAAGO1@ios.doi.gov
T-GMO-005, A	ZPFAAGO1@ios.doi.gov
T-GMO-006, A	ZPFAAGO1@ios.doi.gov
T-GMO-007, A	ZPFAAGO1@ios.doi.gov
T-GMO-008, A	ZPFAAGO1@ios.doi.gov
T-GMO-009, A	ZPFAAGO1@ios.doi.gov
T-GMO-010, A	ZPFAAGO1@ios.doi.gov
tudent6, S	ZPFAAGO1@ios.doi.gov

Reject can be performed by the following **Grants Management Specialist:**

Fuller, 123, Cameron	cam.fuller@demo.viz
P Primary Assignment	

(Search filter: Disabled)

Search Close

Total Records Count: 1

Select	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	NGA Status	Categories/Locale	Action
<input type="checkbox"/>	CE New		University of Hawai i Systems	Awarding Office PPJ / NCR Sponsoring Region	Federal: \$500,000.00 Non-Federal: \$0.00	Approved Federal: \$500,000.00 Non-Federal: \$0.00 Next Workflow Actions	Ready to Generate	Change Service Area	Change Partner Assistance History View View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Business Review Disapprove Reject Generate

Disapprove Reject Generate

Common Questions and Issues: Pre-Award


- **Question:** I need to create a Funding Memo, but the application does not appear on the *Funding Memo* screen. What can I do?
- **What to check:**
 - ❑ On the *Funding Memo* screen, confirm the application number is entered in the Application Number field (and not the Grant Number field).
 - ❑ Search using the **All Statuses** checkbox.
 - ❑ Alternatively, deselect the **All Statuses** checkbox, and select other status (or statuses).
 - ❑ Confirm if the application was approved on the *Application Recommendation* screen.

System Roles to Resolve Issue: GMS, GMO

Common Questions and Issues: Pre-Award

- On the Funding Memo screen, confirm the application number is entered in the Application Number field (and not the Grant Number field).
- Search using the All Statuses checkbox.
- Alternatively, deselect the All Statuses checkbox and select a single status (or statuses) and search.


Funding Memo

Application Type [?] New 

Announcement [?] - Please select an Announcement -

Funding Opportunity # - Please select a Funding Opportunity # -


Grant Program [?] - Please select a Grant Program -

Application Number [?] C 

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	

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




Common Questions and Issues: Pre-Award

- **Question:** The applicant emailed additional documents for their application package, but I can't return the application because it was submitted through Grants.gov. What can I do?
- **What to do:**
 - ❑ Option 1: Upload the documents as Post-Submission Attachments on the *Application Control Checklist* screen.
 - ❑ Option 2: Add a Note to the application and upload the attachments.

System Roles to Resolve Issue: PO, GMS, GMO

Common Questions and Issues: Pre-Award

- Open the *Application Control Checklist*.
 - Select the application number hyperlink from the *Application Receipt and Logging*, *Application Recommendation*, *Funding Memo*, or *Award Processing* screens.
- From the Post Submission Supplemental Information table, select the **Attachments** hyperlink to upload documents to the application package.

Online Forms	Enclosure(s)	Attachment(s)	Status
SF-424 Application for Federal Assistance Version 2	View Online No Comments Entered	0 Uploaded Files 0 Mail-in Items	
SF-424A Budget Information - Non-Construction	View Online Print Completed No Comments Entered	0 Uploaded Files 0 Mail-in Items	
SF-LLL Disclosure of Lobbying Activities (Version 2.0)	View Online No Comments Entered	0 Uploaded Files 0 Mail-in Items	

Post Submission Supplemental Information	
Description	Attachment(s) Uploaded Files
No Attachments Uploaded	

[Application Package Status:](#) Review in Progress

Mail-In Package Information: Alaska Region MABO (PAK) is currently not expecting to receive a Mail-In Package for this application.

[Application Notes](#) [Withdraw Review](#) [Close](#)

Submission Notice

Common Questions and Issues: Pre-Award

- Add an Application Note from the most screens within GrantSolutions GMM.
- From the *Application Control Checklist* screen, select the **Application Notes** button.

No Comments Entered 0 M

Post Submission Supplemental Information

Description	Attachment(s) : Uploaded Files
No Attachments Uploaded	

[Application Package Status](#): Review in Progress

Mail-In Package Information: Alaska Region MABO (PAK) is currently not expecting to receive a Mail-In Package for this application.

Application Notes

Withdraw Review

Close

Submission Notice

GrantSolutions does not hold any responsibility for data loss prior to your submission. Your electronic submission components will be confirmed. You will also receive an acknowledgement of receipt by regular postal mail when all mail-in attachments of the application package have been received. After you submit the electronic portion of your application, GrantSolutions will NOT consider your application complete unless GrantSolutions receives all required documents by the due date requirements specified in the grant announcement. Please be sure to label all your correspondence with the correct application number.

Common Questions and Issues

Award

Common Questions and Issues: Award

- **Question:** I need to generate the draft notice of award from the *Funding Memo* screen. The status is approved, but there is no “Generate” link. What do I do?
- **What to Check:**
 - ❑ Do you have the correct role to generate an award? You will need the GMS or GMO role.
 - ❑ Is the Business Review complete with the status Yes or Yes, with concerns?

System Roles to Resolve Issue: GMS and GMO

Common Questions and Issues: Award

- On the *Funding Memo* screen, if the status is Awaiting Business Review, the “Generate” hyperlink does not display
 - Select the **Business Review** hyperlink from the Action column to complete the Business Review
 - Save the Business Review

Select <input type="checkbox"/>	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	NGA Status	Categories/Locale	Action
	CE New		University of Hawai i Systems	Awarding Office PPJ / NCR Sponsoring Region	Federal: \$500,000.00 Non-Federal: \$0.00	Approved Federal: \$500,000.00 Non-Federal: \$0.00 Next Workflow Actions	Awaiting Business Review	Change Service Area	Change Partner Assistance History View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Business Review Disapprove

Common Questions and Issues: Award

- Once the Business Review is complete, the Status will change to *Ready to Generate*, and the **Generate** hyperlink will be available

Select <input type="checkbox"/>	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	NGA Status	Categories/Locale	Action
	CI New		University of Hawai i Systems	Awarding Office PPJ / NCR Sponsoring Region	Federal: \$500,000.00 Non-Federal: \$0.00	Approved Federal: \$500,000.00 Non-Federal: \$0.00 Next Workflow Actions	Ready to Generate	Change Service Area	Change Partner Assistance History View View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Disapprove Generate

Common Questions and Issues: Award

- **Question:** After selecting the **Save and Verify** button from the *Edit Notice of Award* screen, I receive the error “The value entered in AMOUNT AWARDED THIS ACTION of the NGA Draft must equal the total of the NEW AMT. item fields for all Financial Accounts entered on the NGA Draft.” What can I do?
- **What to Check:**
 - ❑ Verify the “Amount Awarded This Action” is correct in the *Edit Notice of Award* screen. If the amount is incorrect, make the change on the Budget Worksheet
 - ❑ Review the allocation and dollar value entries across the Budget Worksheet to ensure they are consistent and correct

System Roles to Resolve Issue: GMS and GMO

Common Questions and Issues: Award

- To check the “Amount of Financial Assistance this Action” from the *Edit Notice of Award* screen, scroll down to line 12. If the amount is incorrect, make changes on the Budget Worksheet.

12. Award Computation

a. Amount of Federal Financial Assistance (from item 11m).	\$500,001.00
b. Less Unobligated Balance From Prior Budget Periods	\$0.00
c. Less Cumulative Prior Award(s) This Budget Period	\$0.00
d. AMOUNT OF FINANCIAL ASSISTANCE THIS ACTION	\$500,001.00

- Access the Budget Worksheet from the *Award Overview* screen 📁

Award Overview		
Organization:	H	LLC.
Project Title:	Ti	
DUNS:	0	CCR EIN:
Grant Number:	1	Approved Amount:
Amendment Number:	0	Funds Restricted:
Budget period Number:	2	Project Period:
FAIN:	1	Budget Period:
Application Number:	11	Application Type:
Workflow Status:	Drafted	Last Updated By/Date:

Award Preparation

- [Edit/Validate Organization](#)
- [Select Org Address](#)
- [Project Assignments](#)
- [Budget Worksheet](#)**
- [Terms and Conditions](#)
- [Funding Restrictions](#)
- [Manage Project Abstract](#)
- [Application Notes](#)
- [Edit Notice of Award](#)

Award Actions

- [Ready for Approval](#)
- [Delete Notice of Award](#)

Common Questions and Issues: Award

- In this case, the error is fairly easy to spot
- Correct the error in the Budget Worksheet, and save the changes

Recommended ?	
	1.00
	0.00
	0.00
	0.00
	0.00
	500,000.00
Program Income	
Total This Action ?	\$500,001.00

Common Questions and Issues

Post-Award



Common Questions and Issues: Post-Award

- **Question:** I want to build a frequently used search on the *Grants List* screen. How do I build my criteria and then save the search?
- **What to Do:**
 - ❑ Navigate to the *Grants List* Advanced Search view
 - ❑ Select criteria and filters from the Advanced Search
 - ❑ Run the search
 - ❑ Save the search

System Roles to Resolve Issue: All Grantors

Common Questions and Issues: Post-Award

- From the Advanced Search view, the following icons are used to:

- Run the search 
- Save the search 

Grants List

▼ Default / Selected Search Criteria

☒ * Expired/Active:Active Projects Only ☒ * Assignment Type:All Grants ☒ Grant Program:Save America's Treasures

Grant Program  Save America's Treasures  

Common Questions and Issues: Post-Award

- **Question:** My Recipient is not able to view their Notice of Award. How can I help?
- **What to Check:**
 - ❑ Is the Recipient assigned to the correct organization? Ensure the Recipient is assigned to the organization that received the award. You may need to check the DUNS from the *Organization Information* screen.
 - ❑ Is the Recipient assigned to the Project Assignments screen in GrantSolutions GMM? Recipients with the role Principal Investigator/Program Director (PI/PD) must be assigned to the award to view it from their *My Grants List* screen. Check to see if the Recipient has been properly assigned.

System Roles to Resolve Issue: GMS and GMO


Common Questions and Issues: Post-Award

- To confirm the Recipient organization's DUNS:
 - From the *Grants List* screen, search for the award
 - From the Results table, select the **organization name** hyperlink from the Organization column
 - The *Organization Information* screen displays


Organization Information

[Recipient Insight](#)

General


Organization Name	University of Wyoming
Abbreviation	
DUNS	06-56 
EIN	8-1
Organization Level	Grantee
Organization Type	Public/State Controlled Institution of Higher Education
Parent Organization Name	
Organization ID	193349

SAM.gov information


CCR Official Name	University of Wyoming
CCR Validation Status	Validated (ACTIVE) 
CCR Expiration Date	07-01-2021
CCR EIN	8-1
Exclusions in SAM.gov	No SAM.gov Exclusions

[SAM.gov Details](#)

Common Questions and Issues: Post-Award







- To confirm if the Recipient is assigned to the award in Project Assignments:
 - From the *Grants List* Actions column, select the **Project Assignments** icon 
 - From the Active Assignments tab, search for the Recipient

Project Assignments

Organization: University of Wyoming
Grant Number: P20AB00003 DUNS: 

Display: ☐ All Users ☒ Grantees ☐ Grantors

Active Assignments New Assignments Expired Assignments

	Assigned Name / Email	Username	Role	Primary	Start Date 	End Date 	Add Role
<input checked="" type="checkbox"/>	B:  demo4318820@gmail.com	P R  2	Grantee Principal Investigator / Program Director	<input checked="" type="checkbox"/>	08/04/2020		Add ADO Role
<input checked="" type="checkbox"/>	H:  demo4051445@gmail.com	P D  3	Grantee Administrative Official / Grantee Authorized Representative	<input checked="" type="checkbox"/>	08/04/2020		Add PI/PD Role

Bonus tip!

Select the **Grantees** radio button to filter by Recipients.

Common Questions and Issues: Post-Award

- **Question:** I have a Recipient with the Grantee Authorizing Official (ADO) system role, but they also need the PI/PD role. What can I do?
- **What to Check:**
 - ☐ Navigate to the Project Assignments screen
 - ☐ Locate the Recipient on the Active Assignments tab
 - ☐ Select the Add PI/PD hyperlink
 - ☐ Save the new assignment
- **CAUTION: Always follow your agency's account creation policy and guidelines**

System Roles to Resolve Issue: GMS and GMO

Common Questions and Issues: Post-Award

- Helpful Tips
 - On the *Project Assignments* screen, filter by Grantees
 - Sort by the users' name or role
 - Grantors with the GMO or GMS system role can add a new Recipient record using Project Assignments
- The benefits of Project Assignments are:
 - Drives some notifications
 - Grantors with a Primary Project Assignment have their workflow tasks display on the *Portal* screen
 - Enables users to search for applications and awards assigned to them

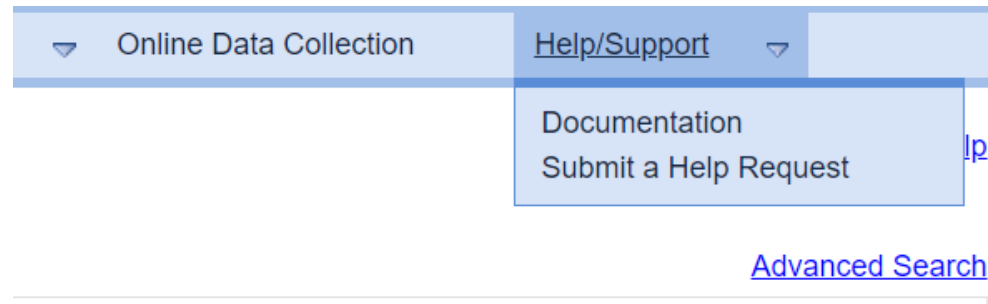
Wrap Up Questions

Additional Resources and Tips

- System Availability
 - Reminder that system maintenance occurs weekly on Thursdays from 9pm-1am, causing downtime between those hours. This information is posted on the GrantSolutions.gov login page
- Any other known issues appear on our [Known Issues](#) page.

Additional Resources and Tips

Support materials such as user guides, documentation, recorded materials are provided on our Support Site.



Federal Support and Training Resources

[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](#)

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**

[View Munich User Documentation \(10/22/20\)](#)

[View Tuscany Part 2 User Documentation \(9/10/20\)](#)

Help Desk

- The GrantSolutions Help Desk is available to provide technical assistance
 - Monday – Friday 7 AM to 8 PM Eastern Time
 - Excluding Federal Holidays
 - **Email:** help@grantsolutions.gov
 - **Phone:** 202-401-5282 or 866-577-0771



Thanks for attending!

