

## Grants List Actions

### GRANTS LIST ACTION ICONS

The “Grants List” screen Results table contains an Action column for each grant. The available actions are as follows:




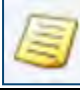
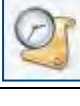
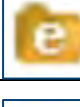
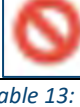
Icon	Icon Name	Description
	View NGA	View or print a PDF version of the last issued Notice of Award
	Manage Amendments	View or initiate post-award amendment actions
	Project Assignments	View, add, or modify Project Assignments
	Grant Notes	View, add, or modify Grant Notes
	History	View the history of the award Financial Assistance project
	Electronic Grant File	View all documents associated with a grant
	Funding Restrictions	Manage and track restrictions on a grant

Table 13: Results Table icons

**Tip:** Hover over an Action icon to view the icon name.

**Note:** Although visible in the *Actions* column, DOI does not use the Track Funding Restrictions icon.

## VIEW NGA

The *View NGA* (Notice of Grant Award or commonly known as NOA) icon allows a user to open the latest issued Notice of Grant Award (referred to as both NGA or NOA) in PDF format. The PDF may be saved or printed.

To view the most recent NOA:

1. Search for the desired grant, and then click the **View NGA** icon.






50   100   150   200   1000						
Grant Number	2	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
			03/21/2016	10/23/2020	Multiple Amendments In-Progress	    

Figure 153: View NGA icon

2. The NOA appears as a PDF in a new window. To close the window, click the **X** in the upper right corner.

**Tip:** Mouse over the NOA to activate the PDF toolbar. The toolbar may be used to print or save the NOA.

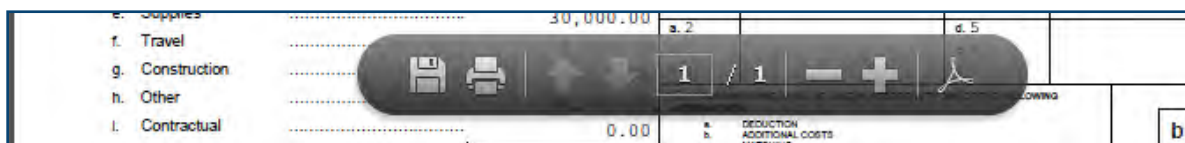


Figure 154: NGA with the PDF toolbar

## MANAGE AMENDMENTS

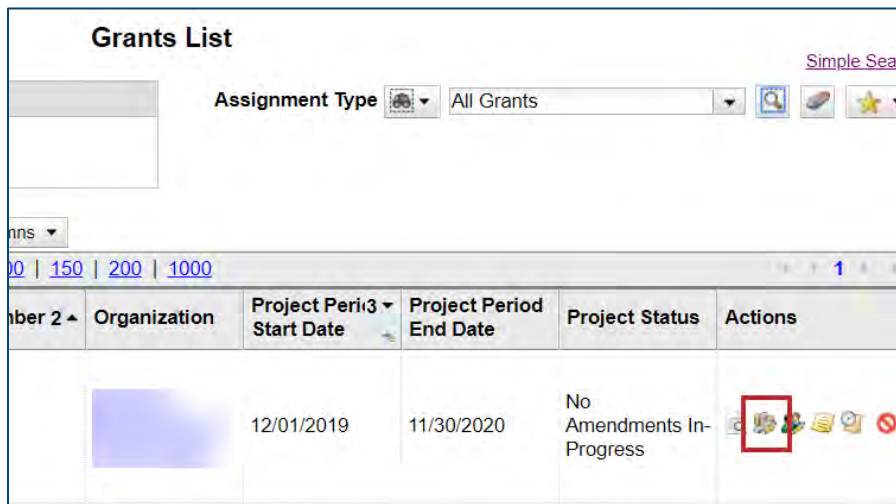
The Post-award action, Amendments are changes made to an awarded grant. Use the Manage Amendments icon to initiate or view Post-Award change requests.

Grant Recipient and Grantor staff may initiate Amendments. Amendment types may include but are not limited to:

- Supplements
- Change in Key Personnel
- Budget Revisions
- Carryovers
- Change in Grant recipient address

To view Amendments in progress or to initiate a new Amendment:

1. Launch GrantSolutions GMM and search for a grant on the “Grants List” screen.
2. From the *Actions* column of the Results table, click the **Manage Amendments** icon to view amendments in progress or to initiate a new amendment.





Number	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
		12/01/2019	11/30/2020	No Amendments In-Progress	 

Figure 155: Manage Amendments icon

The “Manage Amendments” screen displays.

### Manage Amendments

Grant Number

20BS0001

Grantee Name

Project Title

BSEE Environmental Safety Studies Program

Project Start Date

12/01/2019

Project End Date

11/30/2020

Last Issued NGA

12/04/2019 [\(View NGA\)](#)

Amendment #	Status	Submitted Date	Type	Budget Period	Funds Requested	Funds Approved	Funding Memo Required	Action
							Funding Memo Status	
(There are no Amendments found for this Grant.)								

New

Close

Figure 156: Manage Amendments screen

To learn more information about amendments, refer to the Chapter 4: Post Award Processing guide.

## PROJECT ASSIGNMENTS

Project Assignments are used in the GrantSolutions GMM to assign Federal and Contract staff to their grant portfolios. Once assigned, Federal and Contract staff:

- Receive email notifications when they need to perform a task for a grant project
- Receive email notifications to view Notes for a grant project
- Search for their grant portfolio using the My Grants or My Primary Grants filters
- Access tasks from the “Portal” screen

Grant Recipients with the Grantee Authorizing Official (ADO) or Principal Investigators/Program Director (PI/PD) system roles also receive Project Assignments in the GrantSolutions GMM. Once assigned to a grant project, Recipients receive email notifications when:

- Awards are issued or returned
- FFRs and PPRs are due, accepted, or rejected
- Grantors or Recipients add Notes to a grant project

**Note:** Project Assignments are also made during the award process to ensure Grantor and Recipient Official’s names are available for selection on the NOA.

### Project Assignment Role Matrix

Federal and Contract staff can assign themselves and other users to Financial Assistance projects, depending on their system role. Review the Project Assignments Role Matrix to identify which GrantSolutions GMM roles can assign projects to other users.

Assigned Role	Authority to Assign
<b>GMO</b>	All Grantor and Recipient roles
<b>GMS</b>	All Grantor and Recipient roles except GMO
<b>GSS</b>	None (view-only access)
<b>AO</b>	All Program Office roles
<b>OD</b>	OD, PC, PO, PSS
<b>PC</b>	PC, PO, and PSS
<b>PO</b>	PO and PSS
<b>PSS</b>	None (view-only access)

Table 14: Project Assignment Role Matrix

Grantors can assign users to grant projects one at a time or in bulk from the “Grants List” screen.

Access the Project Assignments Screen

To access the *Project Assignments* screen for a single grant project:

1. Search for awarded projects from the “Grants List” screen.
2. The Results table displays. Click the **Project Assignments** icon from the Actions column.

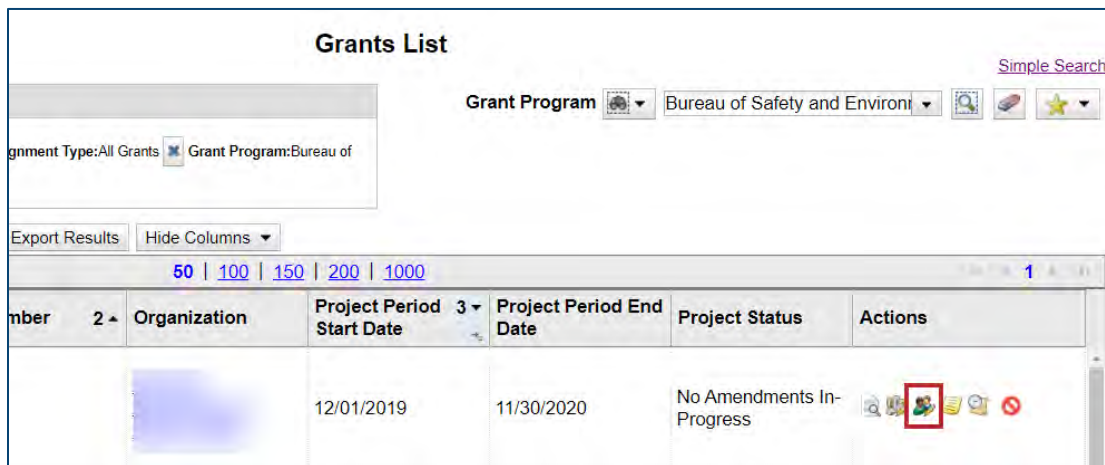


Figure 157: Grants List Screen – Project Assignments icon

The “Project Assignments” screen opens in a new window.

### Project Assignments

**Organization:**  

**Grant Number:** 20BS0001    **DUNS:**  

Display: ☒ All Users   ☐ Grantees   ☐ Grantors

Assign	Name / Email	Username	Role	Prima	Start Date	End Date	Add Role
<input checked="" type="checkbox"/>	AT-DOI-GMO-010, U U.AT-DOI-GMO-010@gs.hhs.gov	UAT-DOI-GMO-010	Grants Management Specialist	<input checked="" type="checkbox"/>	11/20/2019		
	<b>P</b>						
<input checked="" type="checkbox"/>	AT-DOI-GMO-011, U U.AT-DOI-GMO-011@gs.hhs.gov	UAT-DOI-GMO-011	Grants Management Officer	<input type="checkbox"/>	11/20/2019		
<input checked="" type="checkbox"/>	AT-DOI-OD-013, U U.AT-DOI-OD-013@gs.hhs.gov	UAT-DOI-OD-013	Office Director	<input checked="" type="checkbox"/>	11/20/2019		
	<b>P</b>						
<input checked="" type="checkbox"/>	AT-DOI-PAO-010, U U.AT-DOI-PAO-010@gs.hhs.gov	UAT-DOI-PAO-010	Authorizing Official	<input checked="" type="checkbox"/>	11/20/2019		
	<b>P</b>						

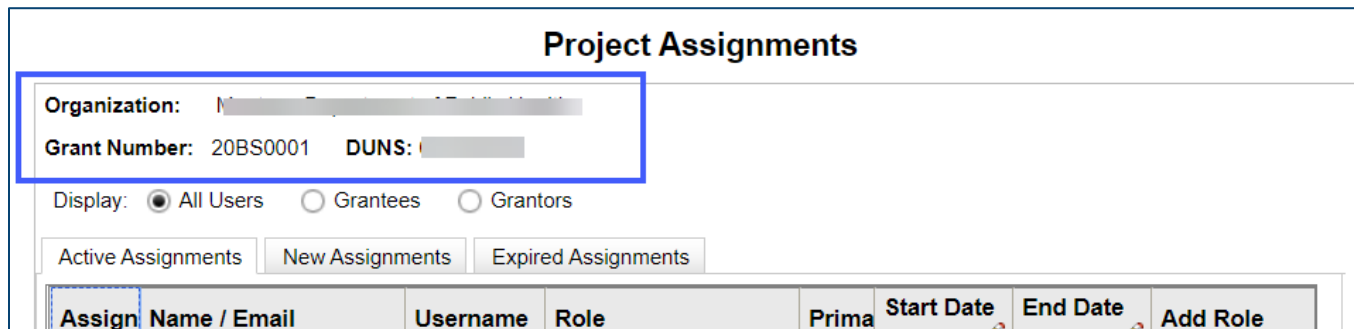
**P** Primary Assignment

Figure 158: Project Assignments Screen

Review the information towards the top of the page to verify the correct awarded Financial Assistance project is selected.

Label	Description
Organization	Recipient organization's name
Grant Number	Grant number
DUNS	Recipient Dun and Bradstreet Number

Table 15: Financial Assistance project information



**Project Assignments**

Organization: [Redacted]  
Grant Number: 20BS0001 DUNS: [Redacted]

Display: ☒ All Users ☐ Grantees ☐ Grantors

Active Assignments New Assignments Expired Assignments

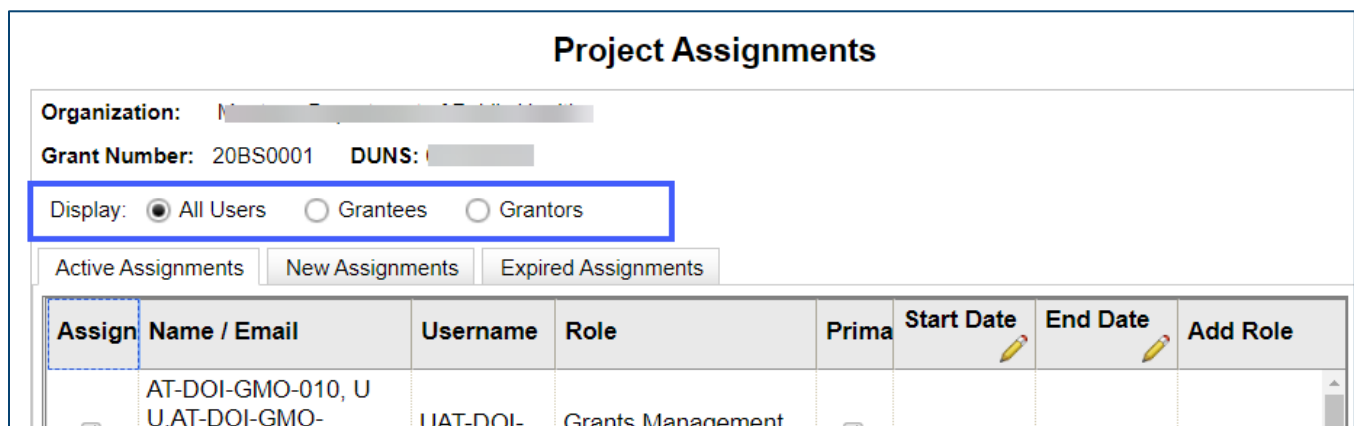
Assign	Name / Email	Username	Role	Prima	Start Date	End Date	Add Role
--------	--------------	----------	------	-------	------------	----------	----------

Figure 159: Project Assignments award information

**Note:** Use the Display radio buttons to filter the Project Assignments table by user type.

Action	Description
All Users	View Recipient and Grantor records - All Users is the default
Grantees	View Grant Recipient records only
Grantors	View Grantor records only

Table 16: Display radio button descriptions



**Project Assignments**

Organization: [Redacted]  
Grant Number: 20BS0001 DUNS: [Redacted]

Display: ☒ All Users ☐ Grantees ☐ Grantors

Active Assignments New Assignments Expired Assignments

Assign	Name / Email	Username	Role	Prima	Start Date	End Date	Add Role
	AT-DOI-GMO-010, U U.AT-DOI-GMO-	UAT-DOI-	Grants Management				

Figure 160: Project Assignments Display filters



3. Select a Project Assignment tab to view Project Assignment details or perform an action.

Tab Name	Action
Active Assignments	Grantors and Recipients already assigned to a project appear in the Active Assignments tab. <ul style="list-style-type: none"> <li>• <b>View</b> existing assignments</li> <li>• <b>Unassign</b> users from projects</li> </ul>
New Assignments	All users available for assignment to a project appear under the New Assignments tab. <ul style="list-style-type: none"> <li>• <b>View</b> users available for assignment</li> <li>• <b>Assign</b> users to a project</li> </ul>
Expired Assignments	<b>View</b> users previously assigned to a project

Table 17: Project Assignments tabs

**Project Assignments**

**Organization:**   
**Grant Number:** 20BS0001    **DUNS:**   
Display: ☒ All Users   ☐ Grantees   ☐ Grantors

Active Assignments   New Assignments   Expired Assignments

Assign	Name / Email	Username	Role	Prima	Start Date	End Date	Add Role
<input checked="" type="checkbox"/>	AT-DOI-GMO-010, U U.AT-DOI-GMO-010@gs.hhs.gov	UAT-DOI-GMO-010	Grants Management Specialist	<input checked="" type="checkbox"/>	11/20/2019		
<input checked="" type="checkbox"/>	AT-DOI-GMO-011, U U.AT-DOI-GMO-011@gs.hhs.gov	UAT-DOI-GMO-011	Grants Management Officer	<input type="checkbox"/>	11/20/2019		
<input checked="" type="checkbox"/>	AT-DOI-OD-013, U U.AT-DOI-OD-013@gs.hhs.gov	UAT-DOI-OD-013	Office Director	<input checked="" type="checkbox"/>	11/20/2019		
<input checked="" type="checkbox"/>	AT-DOI-PAO-010, U U.AT-DOI-PAO-010@gs.hhs.gov	UAT-DOI-PAO-010	Authorizing Official	<input checked="" type="checkbox"/>	11/20/2019		

**P** Primary Assignment

Save   Save & Close   Cancel

Figure 161: Project Assignments tabs

Grantors and Grant Recipients already assigned to a project appear in the Active Assignments tab. The Active Assignments tab includes the following columns and actions:

Column	Description
Assigned	<p>The Assigned checkbox is selected next to each name. <b>Deselect</b> a checkbox and click <b>Save</b> to unassign a Project Assignment.</p> <p><b>Note:</b> Unassigned records move to the New Assignments and Expired Assignments tabs.</p>
Name / Email	<p>The first name, last name, and email address of the assignee.</p> <p>A <b>P</b> icon in this column indicates the user has the Primary Project Assignment.</p>
Username	<p>The assignee's GrantSolutions GMM username.</p> <p>When a Recipient has a record in GrantSolutions GMM but does not yet have an account (username and password), Grantors with a Grants Office system role can click the <b>Create Account</b> link from the Username column. Once clicked, the Recipient receives email notifications with their username and temporary password.</p>
Role	The assignee's authority, such as Program Officer, Grants Management Specialist, etc.
Primary	<p>Users assigned as Primary for a role receive Tasks on the <i>Portal</i> Task List. There must be one Primary Assignment per role for a Financial Assistance project.</p> <p>Multiple users with the same role can be assigned to the same Financial Assistance project. However, only one individual can have the Primary Assignment for a role.</p>
Start Date	The date the assignment begins. It is possible to set a date in the future.
End Date	The date the assignment ends. Use this option if the assignment is temporary and needs to end on a certain date.

Column	Description
	Once the End Date passes, the assignment moves to the Expired Assignments table.
Add Role	Only staff with a Grants Office system role can assign Recipients. A member of the GrantSolutions Support Team must create additional Recipient roles such as Support Staff and Financial Officer.

Table 18: Active Assignment tab - Columns and Descriptions

### Project Assignments

Organization:

Grant Number: 20BS0001    DUNS:

Display: ☒ All Users   ☐ Grantees   ☐ Grantors

Active Assignments
New Assignments
Expired Assignments

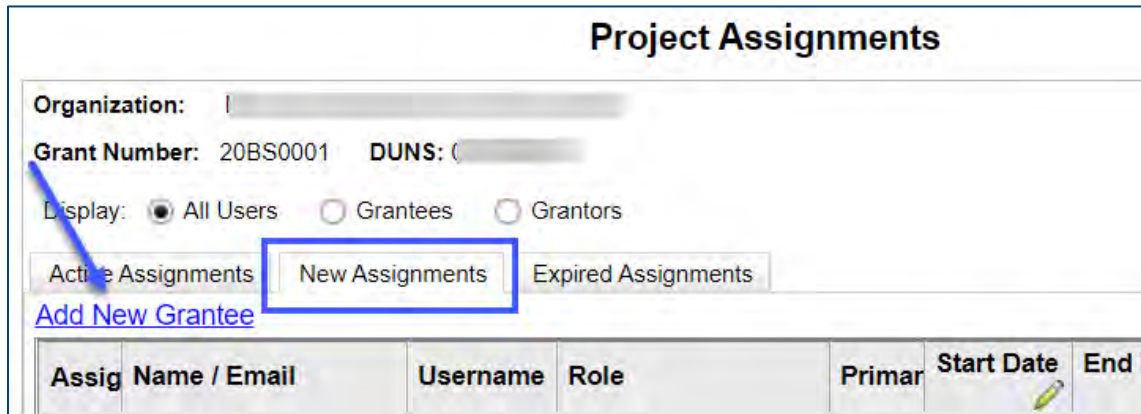
Assigned	Name / Email	Username	Role	Primary	Start Date	End Date	Add Role
<input checked="" type="checkbox"/>	AT-DOI-GMO-010, U U.AT-DOI-GMO-010@gs.hhs.gov	UAT-DOI-GMO-010	Grants Management Specialist	<input checked="" type="checkbox"/>	11/20/2019		
<input checked="" type="checkbox"/>	AT-DOI-GMO-011, U U.AT-DOI-GMO-011@gs.hhs.gov	UAT-DOI-GMO-011	Grants Management Officer	<input type="checkbox"/>	11/20/2019		
<input checked="" type="checkbox"/>	AT-DOI-OD-013, U U.AT-DOI-OD-013@gs.hhs.gov	UAT-DOI-OD-013	Office Director	<input checked="" type="checkbox"/>	11/20/2019		
<input checked="" type="checkbox"/>	AT-DOI-PAO-010, U U.AT-DOI-PAO-010@gs.hhs.gov	UAT-DOI-PAO-010	Authorizing Official	<input checked="" type="checkbox"/>	11/20/2019		

**P** Primary Assignment

Figure 162: Project Assignments Screen – Active Assignments tab

Assign users to a grant project from the *New Assignments* tab.

Additionally, Grantor and Contract staff with a Grants Office system role can add new Grant Recipient records and accounts from the **Add New Grantee** link.



The screenshot shows the 'Project Assignments' interface. At the top, there are fields for 'Organization:', 'Grant Number: 20BS0001', and 'DUNS:'. Below these are radio buttons for 'Display: All Users', 'Grantees', and 'Grantors'. There are three tabs: 'Active Assignments', 'New Assignments' (which is highlighted with a blue box), and 'Expired Assignments'. Below the tabs is a link labeled 'Add New Grantee'. At the bottom, there is a table header with columns: 'Assign', 'Name / Email', 'Username', 'Role', 'Primary', 'Start Date', and 'End Date'.

Figure 163: New Assignments tab - Add New Grantee link

The New Assignments tab includes the following columns and actions:

Column Names	Description
Assign	<p>Select the <b>Assign</b> checkbox next to the name(s) of individuals to assign them to the project. Complete more than one assignment at the same time.</p> <p>Click the <b>Save</b> button towards the bottom of the screen to move the record to the Active Assignments tab.</p>
Name / Email	The first name, last name, and email address of the assignee.
Username	<p>The assignee's GrantSolutions GMM username.</p> <p>When a Recipient has a record in GrantSolutions GMM but does not yet have an account (username and password), Grantors with a Grants Office system role can click the <b>Create Account</b> link from the Username column. Once clicked, the Recipient receives email notifications with their username and temporary password.</p>
Role	The assignee's authority, such as Program Officer, Grants Management Specialist, etc.

Column Names	Description
Primary	<p>Users assigned as Primary for a role receive Tasks on the <i>Portal</i> Task List. There must be one Primary Assignment per role for a Financial Assistance project.</p> <p>Multiple users with the same role can be assigned to the same Financial Assistance project. However, only one individual can have the Primary Assignment for a role.</p>
Start Date	The date the assignment begins. It is possible to set a date in the future, so the assignment does not immediately take effect.
End Date	<p>The date the assignment ends. Use this option if the assignment is temporary and needs to end on a certain date.</p> <p>Once the End Date passes, the assignment moves to the Expired Assignments table.</p>
Add Role	Assign the ADO or PI/PD role to a Recipient's record.

Table 19: New Assignment tab – Column Names and Descriptions

**Note:** To add a new Recipient person record, click the **Add New Grantee** link. To assign a recipient user the ADO or PI/PD roles, click the **Add ADO/PIPD Role** link.

**Project Assignments**

**Organization:**

**Grant Number:** 20BS0001    **DUNS:**

Display: ☒ All Users    ☐ Grantees    ☐ Grantors

Active Assignments    **New Assignments**    Expired Assignments

[Add New Grantee](#)

Assign	Name / Email	Username	Role	Primary	Start Date	End Date	Add Role
<input type="checkbox"/>				<input type="checkbox"/>			<a href="#">Add ADO/PIPD Role</a>
<input type="checkbox"/>		<a href="#">Create Account</a>	Grantee Administrative Official / Grantee Authorized Representative	<input type="checkbox"/>			
<input type="checkbox"/>		<a href="#">Create Account</a>	Grantee Principal Investigator / Program Director	<input type="checkbox"/>			
<input type="checkbox"/>			Grantee Principal Investigator / Program Director	<input type="checkbox"/>			
<input type="checkbox"/>			Grantee Administrative Official / Grantee Authorized Representative	<input type="checkbox"/>			

Table 20: Project Assignments Screen – New Assignments tab

**Note:** Users whose Project Assignments expired or were removed display under the *Expired Assignments* tab. This tab is read-only as it lists the assignment history. Reassign expired users from the *New Assignments* tab.

**Note:** The Expired Assignments tab includes the following columns and actions:

Column	Description
Name / Email	The first name, last name, and email address of the assignee.
Username	The assignee's GrantSolutions GMM username.
Role	The assignee's authority, such as Program Officer, Grants Management Specialist, etc.
Start Date	The date the assignment began.
End Date	The date the assignment ended.

*Table 21: Expired Assignments Tab*



## Add a Project Assignment

To assign a user to a grant project:

1. Click the **New Assignments** tab.
2. From the Assign column, select the **checkbox(es)** to each user to assign them to the project.

**Project Assignments**

Organization:

Grant Number: 20BS0001 DUNS:

Display: ☒ All Users ☐ Grantees ☐ Grantors

Active Assignments **New Assignments** Expired Assignments

[Add New Grantee](#)

Assign	Name / Email	Username	Role	Primary	Start Date	End Date	Add Role
<input type="checkbox"/>	<input type="text"/>			<input type="checkbox"/>			<a href="#">Add ADO/PIPD Role</a>
<input checked="" type="checkbox"/>	nem@n.gov	<a href="#">Create Account</a>	Grantee Administrative Official / Grantee Authorized Representative	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	nem@n.gov	<a href="#">Create Account</a>	Grantee Principal Investigator / Program Director	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	<input type="text"/> mt.gov	KAklestad	Grantee Principal Investigator / Program Director	<input type="checkbox"/>			
			Grantee				

Save Save & Close Cancel

Figure 164: Project Assignments Screen – Assign checkboxes

3. Click the **Save** button to save the changes or click the **Save & Close** button to save the changes and close the *Project Assignments* screen.

**Note:** The triangle with the exclamation point means that changes have been made but not yet saved.

Save Save & Close Cancel

Figure 165: Project Assignments Screen – Save and Save & Close buttons



The newly assigned user(s) moves to the Active Assignments tab.

**Tip:** Every role assigned to a Financial Assistance project must have a designated Primary user. When assigning a user to a project without an existing Primary, the system automatically creates the Primary assignment. When this occurs, an information message displays. Click the **OK** button to close the message.

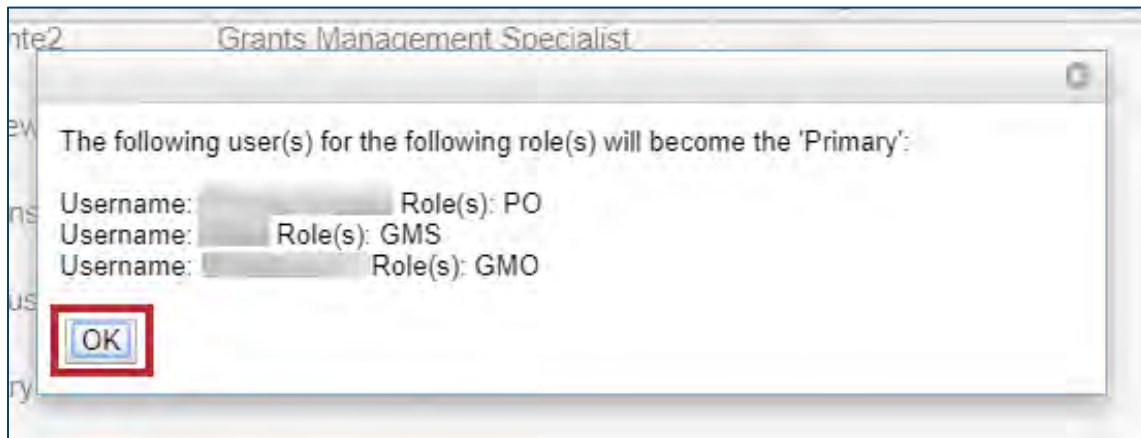


Figure 166: Project Assignments Screen – Confirmation message and OK button

### Assign a New Grant Recipient Role

To assign a Grant Recipient one or more system roles (PI/PD and/or ADO):

1. Select the **Grantees** radio button.
2. Click the New Assignment tab.

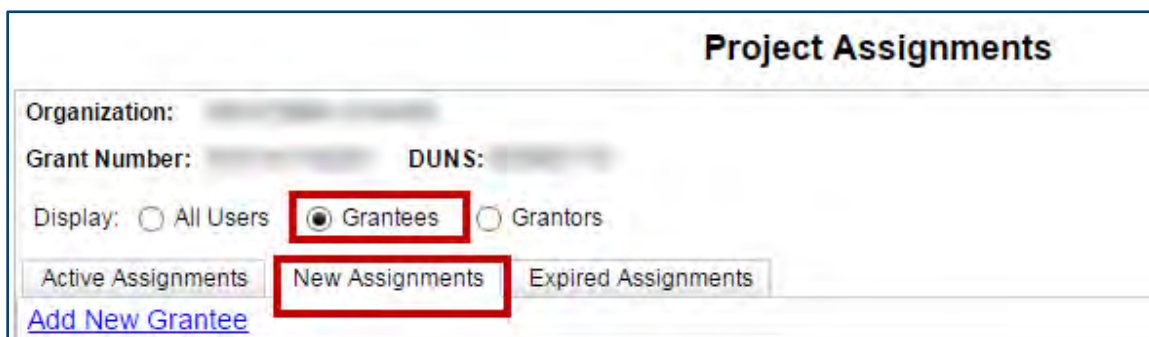


Figure 167: Project Assignments Screen – New Assignments tab

3. Using the Name/ Email field or the Username field, locate the user to receive the role assignment.
4. Click the **Add ADO/PIPD Role** hyperlink from the Add Role column.

**Project Assignments**

Organization:

Grant Number:  DUNS:

Display: ☐ All Users ☒ Grantees ☐ Grantors

[Add New Grantee](#)

Assign	Name / Email	Username	Role	Primary	Start Date	End Date	Add Role
<input type="checkbox"/>				<input type="checkbox"/>			<a href="#">Add ADO/PIPD Role</a>
<input type="checkbox"/>				<input type="checkbox"/>			<a href="#">Add ADO/PIPD Role</a>
<input type="checkbox"/>				<input type="checkbox"/>			<a href="#">Add ADO/PIPD Role</a>

Figure 168: Project Assignments Screen – Add ADO/PIPD Role link

The *Assign Role* screen displays.

5. Select one or both **Recipient role(s)** (Grantee Principal Investigator / Program Director and Grantee Administrative Official / Grantee Authorizing Representative) checkboxes.
6. Click the **Save** button.

**Assign Role**

☒ Grantee Principal Investigator / Program Director

☒ Grantee Administrative Official / Grantee Authorizing Representative

Figure 169: Assign Role Screen – PI/PD and ADO role checkboxes and Save button

The *Project Assignments* New Assignments tab displays.

In this example, the Recipient has the PI/PD and ADO roles. Each role for the user displays in a new row in the New Assignments tab. The roles are now available for assignment.

**Project Assignments**

Organization: [Redacted]  
Grant Number: 20BS0001 DUNS: [Redacted]  
Display: ☐ All Users ☒ Grantees ☐ Grantors  
Active Assignments New Assignments Expired Assignments  
[Add New Grantee](#)

Assign	Name / Email	Username	Role	Primary	Start Date	End Date	Add Role
<input type="checkbox"/>	[Redacted]	<a href="#">Create Account</a>	Grantee Principal Investigator / Program Director	<input type="checkbox"/>			
<input type="checkbox"/>	[Redacted]	<a href="#">Create Account</a>	Grantee Administrative Official / Grantee Authorized Representative	<input type="checkbox"/>			
			Grantee Administrative				

Figure 170: Project Assignments Screen – New Assignments tab

Create a New Grant Recipient Account

To create a new Grant Recipient account:

1. Select the **Grantees** radio button to view Recipient users only.
2. Click the **New Assignments** tab.

**Project Assignments**

Organization: [Redacted]  
Grant Number: [Redacted] DUNS: [Redacted]  
Display: ☐ All Users ☒ Grantees ☐ Grantors  
Active Assignments New Assignments Expired Assignments  
[Add New Grantee](#)

Figure 171: Project Assignments screen – Grantees radio button and New Assignments tab

- Click the **Create Account** hyperlink to create a new account.

**Project Assignments**

Organization: [Redacted]  
Grant Number: 20BS0001 DUNS: [Redacted]  
Display: ☐ All Users ☒ Grantees ☐ Grantors  
Active Assignments New Assignments Expired Assignments  
[Add New Grantee](#)

Assign	Name / Email	Username	Role	Primary	Start Date	End Date	Add Role
<input type="checkbox"/>	[Redacted]	<a href="#">Create Account</a>	Grantee Principal Investigator / Program Director	<input type="checkbox"/>			
<input type="checkbox"/>	[Redacted]	<a href="#">Create Account</a>	Grantee Administrative Official / Grantee Authorized Representative	<input type="checkbox"/>			
			Grantee Administrative				

Figure 172: Project Assignments Screen – Create Account link

The Recipient receives two emails from GrantSolutions, the first with the assigned username and the second with a temporary password.

The Recipient's username is available in the Username column.

**Project Assignments**

Organization: [Redacted]  
Grant Number: 20BS0001 DUNS: [Redacted]  
Display: ☐ All Users ☒ Grantees ☐ Grantors  
Active Assignments New Assignments Expired Assignments  
[Add New Grantee](#)

Assign	Name / Email	Username	Role	Primary	Start Date	End Date	Add Role
<input type="checkbox"/>	[Redacted]	JSmith95	Grantee Principal Investigator / Program Director	<input type="checkbox"/>			
<input type="checkbox"/>	[Redacted]	<a href="#">Create</a>	Grantee Administrative Official / Grantee	<input type="checkbox"/>			

Figure 173: Project Assignments Screen – New username in the Username column

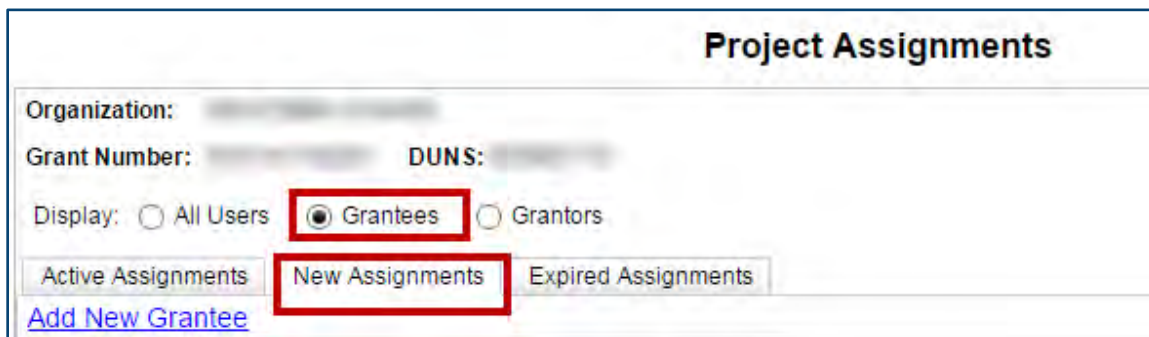
## Add a New Recipient Record or Account

Grantors with a Grants Office system role can add new Recipient records and assign the PI/PD role, ADO role, or both roles. Creating records are useful for ensuring Recipient Officials are available for selection on the Notice of Award before creating their accounts.

**Note:** Grantors cannot delete Recipient accounts. To delete an account, Recipients must submit a formal request to the GrantSolutions Help Desk.

To add a new Recipient record:

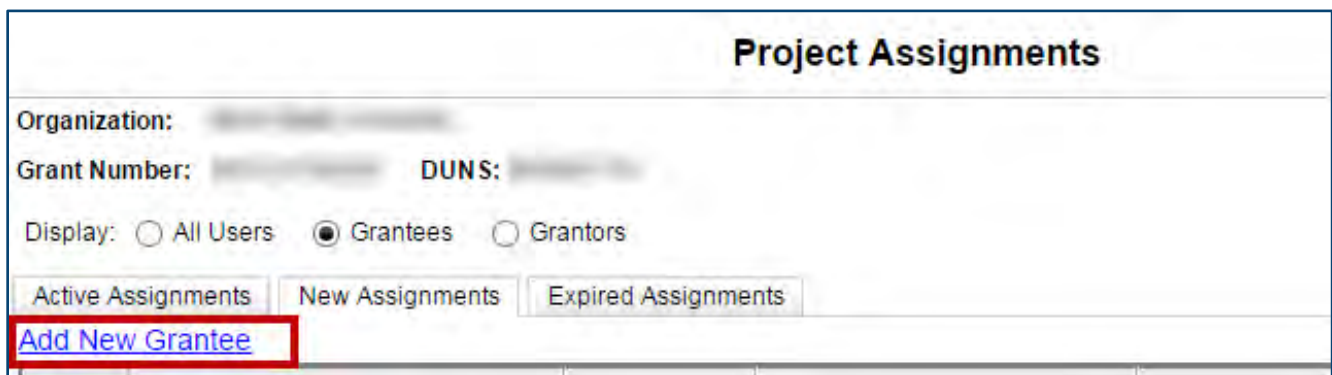
1. From the Project Assignments screen, select the **Grantees** radio button.
2. Click the **New Assignments** tab.



The screenshot shows the 'Project Assignments' screen. At the top, there's a header 'Project Assignments'. Below it, there are input fields for 'Organization:', 'Grant Number:', and 'DUNS:'. Under these, there's a 'Display:' section with three radio buttons: 'All Users', 'Grantees' (which is selected and highlighted with a red box), and 'Grantors'. Below the radio buttons, there are three tabs: 'Active Assignments', 'New Assignments' (highlighted with a red box), and 'Expired Assignments'. At the bottom left, there is a blue link labeled 'Add New Grantee'.

Figure 174: Project Assignments screen – Grantees radio button and New Assignments tab

3. Click the **Add New Grantee** link.



This screenshot is similar to the previous one, showing the 'Project Assignments' screen. The 'Grantees' radio button is selected. The 'New Assignments' tab is also visible. The 'Add New Grantee' link at the bottom left is highlighted with a red box.

Figure 175: Project Assignments Screen – Add New Grantee link



The *Add New Grantee* screen displays. Complete the required fields.

4. Authority section (select one or both roles):
  - a. Select the **Grantee Principle Investigation/Program Director** checkbox to assign the new Recipient the PI/PD role.
  - b. Select the **Grantee Administrative Official/ Grantee Authorized Representative** checkbox to assign the new Recipient the ADO role.



**Add New Grantee**

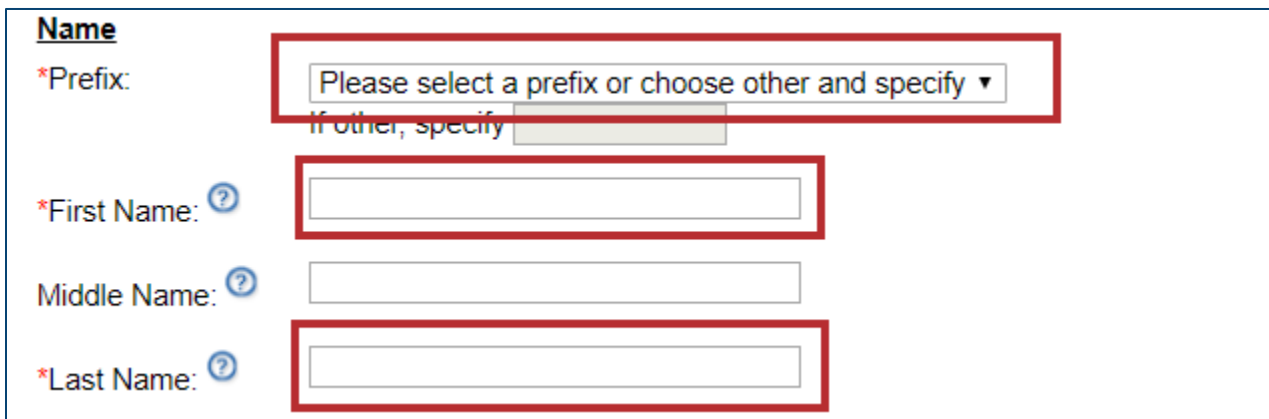
**Authority**

\*Grantee Role: ☒ Grantee Principal Investigator / Program Director  
☒ Grantee Administrative Official / Grantee Authorized Representative

Figure 176: Add New Grantee screen – Grantee Roles checkboxes

5. Scroll down the page and enter required data in the Name section:

- Prefix
- First Name
- Last Name



**Name**

\*Prefix: Please select a prefix or choose other and specify ▼  
 If other, specify

\*First Name:  

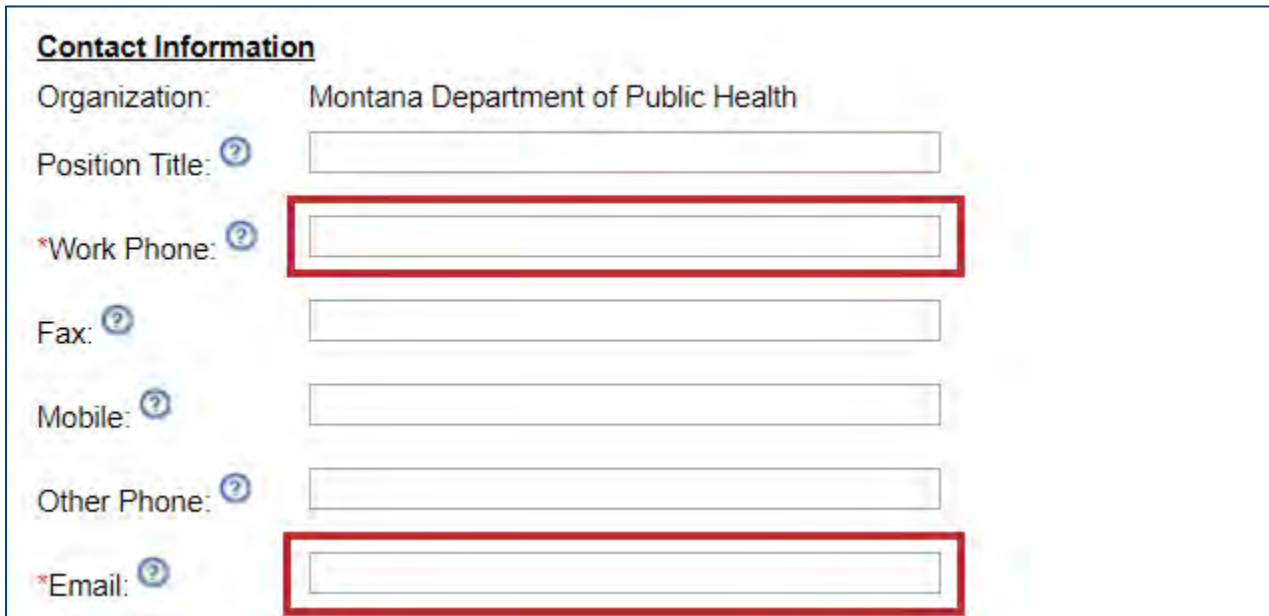
Middle Name:  

\*Last Name:  

Figure 177: Add New Grantee Screen

6. Contact Information section (enter required fields):

- Position Title
- Work Phone
- Email



**Contact Information**

Organization: Montana Department of Public Health

Position Title:

\*Work Phone:

Fax:

Mobile:

Other Phone:

\*Email:

Figure 178: Add Grantee screen - Contact Information

7. Primary Address Information section (required fields):

- Street Address
- City
- State
- Zip Code

**Primary Address Information**

Division/Dept:

\*Street Address:

Mail Stop:

\*City:

County:

\*State:

\*Zip Code:  -

\*Country:

Figure 179: Add New Grantee screen - Primary Address Information section

8. Click the **Add** or **Add & Create User Account** button at the bottom of the screen.

- Click the **Add** button to add a Recipient record
- Click the **Add & Create User Account** button to add the record and create the Recipient user account. The new Recipient user is sent their GrantSolutions GMM username and password via email.

**Add** (OR) **Add & Create User Account** **Cancel**

Figure 180: Add or Add & Create User Account buttons



The “Project Assignments” screen displays.

9. Click the **Save** or **Save & Close** button at the bottom of the Project Assignments screen.



Figure 181: Project Assignments screen – Save buttons

The new Recipient user is available from the Active Assignments tab.

### Manage Assignments for Multiple Grant Projects

Use the Bulk Assignments feature to make assignments for multiple grant projects for a single Grant Program in one action. Only Grantor employees can be assigned using Bulk Assignments.

To assign staff in bulk:

1. Navigate to the *Grants List* screen.

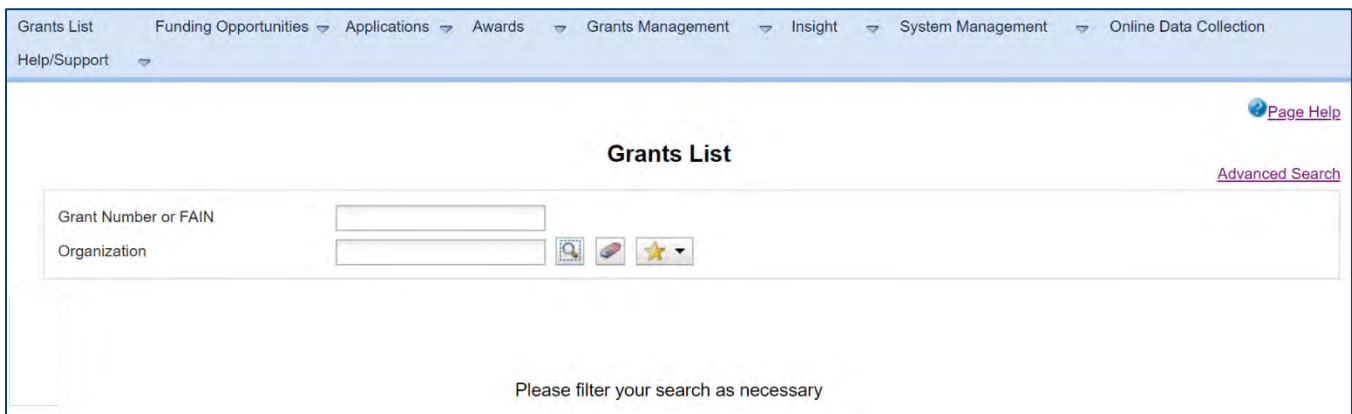


Figure 182: Grants List screen

2. Perform a partial search (enter at least three characters in either search field) on the Simple Search view or build a search in the Advanced Search view.
3. Click the **Search** button display multiple awarded Financial Assistance projects.

**Note:** The Grant Program filter may be useful, as bulk assignments are limited to one grant projects Grant Program at a time.

4. The Results table displays. Click the **checkbox(es)** next to each grant project to receive an assignment.

**Grants List**

Default / Selected Search Criteria

Grant Program: Bureau of Safety and Environmental Enforcement

Search within results: Search Export Results Hide Columns

1 - 5 of 5 items

	Program Office	Grant Number	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
<input checked="" type="checkbox"/>	Bureau of Safety and Environmental Enforcement Program Office	20BS0001		12/01/2019	11/30/2020	No Amendments In-Progress	
<input checked="" type="checkbox"/>	Bureau of Safety and Environmental Enforcement Program Office	20BS0003		12/01/2019	11/30/2020	No Amendments In-Progress	
<input checked="" type="checkbox"/>	Bureau of Safety and Environmental Enforcement Program Office	20BS0004		12/01/2019	11/30/2020	No Amendments In-Progress	

Bureau of Safety

Figure 183: Grants List Screen – Checkboxes and Manage Assignments button

5. Click the **Manage Assignments** button located below the Results table.

<input checked="" type="checkbox"/>	and Environmental Enforcement Program Office	20BS0003		12/01/2019	11/30/2020	No Am Progre
<input checked="" type="checkbox"/>	Bureau of Safety and Environmental Enforcement	20BS0004		12/01/2019	11/30/2020	No Am Progre

Add Bulk Note Manage Assignments

Figure 184: Grants List Results table - Manage Assignments button

The *Person–Role Assignment* screen opens in a new window.

Person-Role Assignment

Operation:

Role:

Last Name:

Select the Staff to assign:

<input type="checkbox"/>	Name	Role
<input type="checkbox"/>		Grants Management Specialist
<input type="checkbox"/>		Authorizing Official
<input type="checkbox"/>		Grants Management Specialist
<input type="checkbox"/>		Program Officer
<input type="checkbox"/>		Program Officer

\* Start Date:

End Date:

The selected staff will be assigned but will not override existing active assignments

Figure 185: Person-Role Assignment screen

6. Select **Assign** from the Operation drop-down list to assign staff to awarded Financial Assistance projects.

**Note:** Use the Role and Last Name drop-down lists to filter results further.

Person-Role Assignment

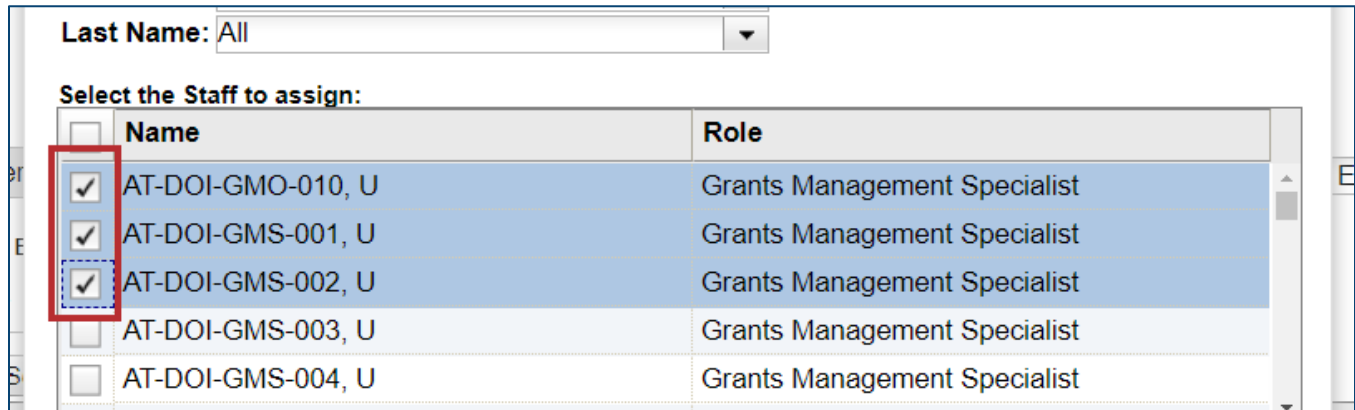
Operation:

Role:

Last Name:

Figure 186: Person-Role Assignment screen - Operation drop-down list

- Click the **checkboxes** next to the name(s) of the staff to assign.



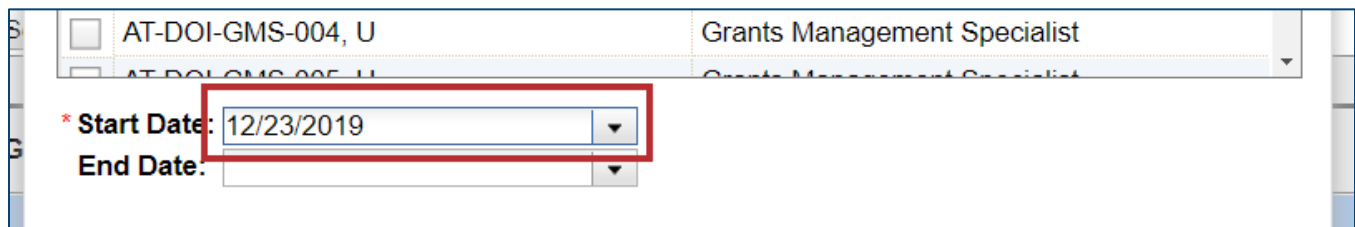
Last Name: All

Select the Staff to assign:

<input type="checkbox"/>	Name	Role
<input checked="" type="checkbox"/>	AT-DOI-GMO-010, U	Grants Management Specialist
<input checked="" type="checkbox"/>	AT-DOI-GMS-001, U	Grants Management Specialist
<input checked="" type="checkbox"/>	AT-DOI-GMS-002, U	Grants Management Specialist
<input type="checkbox"/>	AT-DOI-GMS-003, U	Grants Management Specialist
<input type="checkbox"/>	AT-DOI-GMS-004, U	Grants Management Specialist

Figure 187: Person-Role Assignment screen – Select the Staff to assign list

- Select a **Start Date** to begin the assignments.



AT-DOI-GMS-004, U Grants Management Specialist

AT-DOI-GMS-005, U Grants Management Specialist

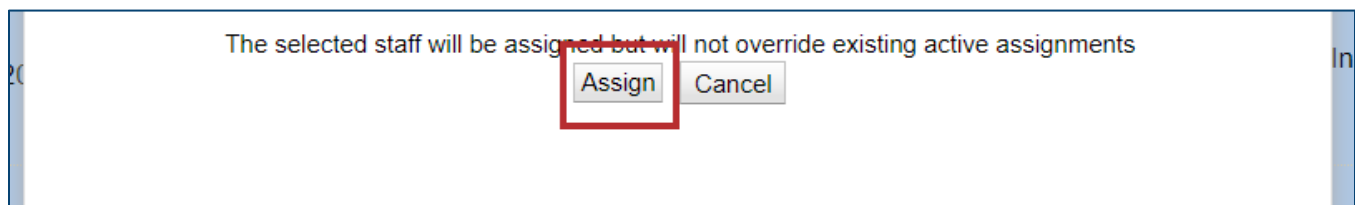
\* Start Date: 12/23/2019

End Date:

Figure 188: Person-Role Assignment screen – Start Date drop-down list

**Note:** Selecting an End Date is optional. Only select an End Date if the assignment is temporary, and the end date is known.

- Click the **Assign** button.



The selected staff will be assigned but will not override existing active assignments

Assign Cancel

Figure 189: Person-Role Assignment Screen – Operation dropdown, checkboxes, Start Date drop-down, and Assign button

**Tip:** Names are not in alphabetical order. Click a **column header** to sort by Name or Role.

10. The message “Are you sure you want to Assign the selected staff?” displays. Click the **OK** button.

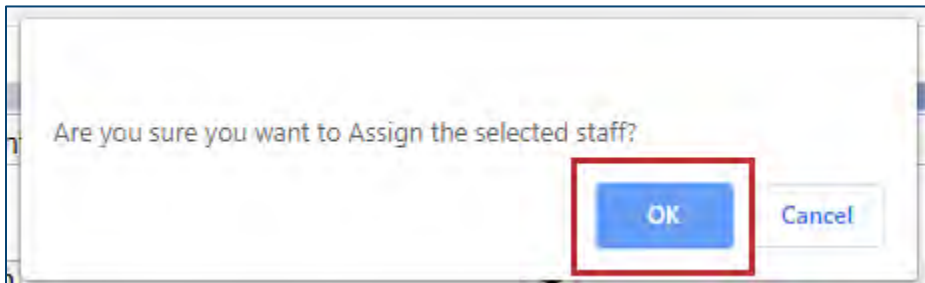


Figure 190: Assignment confirmation message

The “Grants List” screen displays, and the assignments are complete.

To unassign staff from awarded grant projects in bulk, perform the following steps:

1. From the “Grants List” screen, search for multiple grant projects.

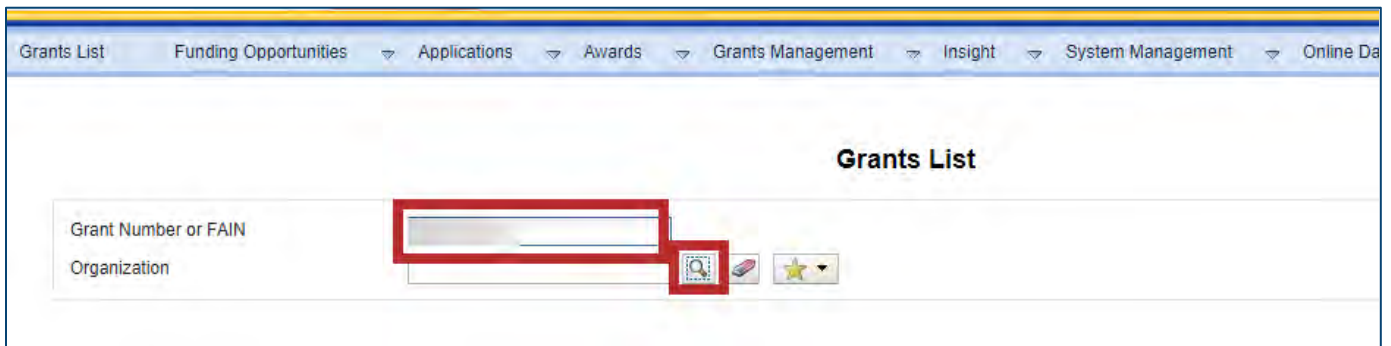


Figure 191: Grants List Search



- The Results table displays. Select the **checkboxes** next to each grant project that requires an assignment change.

**Grants List**

Default / Selected Search Criteria

Grant Program: Bureau of Safety and Environmental Enforcement

Search within results: Search Export Results Hide Columns

1 - 5 of 5 items

	Program Office	Grant Number	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
<input checked="" type="checkbox"/>	Bureau of Safety and Environmental Enforcement Program Office	20BS0001		12/01/2019	11/30/2020	No Amendments In-Progress	
<input checked="" type="checkbox"/>	Bureau of Safety and Environmental Enforcement Program Office	20BS0003		12/01/2019	11/30/2020	No Amendments In-Progress	
<input checked="" type="checkbox"/>	Bureau of Safety and Environmental Enforcement Program Office	20BS0004		12/01/2019	11/30/2020	No Amendments In-Progress	
<input type="checkbox"/>	Bureau of Safety and Environmental Enforcement Program Office	20BS0005		12/01/2019	11/30/2020	No Amendments In-Progress	

Figure 192: Grants List Screen – selected checkboxes

- Click the **Manage Assignments** button located below the Results table.

<input checked="" type="checkbox"/>	Bureau of Safety and Environmental Enforcement Program Office	20BS0003		12/01/2019	11/30/2020	No Amendments In-Progress	
<input checked="" type="checkbox"/>	Bureau of Safety and Environmental Enforcement Program Office	20BS0004		12/01/2019	11/30/2020	No Amendments In-Progress	

Add Bulk Note Manage Assignments

Figure 193: Grants List - Manage Assignments button

The *Person–Role Assignment* screen opens in a new window.

4. Select **Unassign** from the *Operations* drop-down list.

The screenshot shows the 'Person-Role Assignment' window. At the top, the title bar reads 'Person-Role Assignment'. Below the title bar, there are three dropdown menus: 'Operation' (set to 'Unassign'), 'Role' (set to 'All'), and 'Last Name' (set to 'All'). The 'Operation' dropdown is highlighted with a red rectangle. Below these menus, the text 'Select the Staff to unassign:' is followed by a table. The table has two columns: 'Name' and 'Role'. The table lists five staff members, each with an unchecked checkbox in the 'Name' column. Below the table, there is a field for '\* End Date:' with a dropdown arrow. At the bottom, a message states: 'The selected staff will be unassigned from any grant program(s) that has existing assignment.' Below this message are two buttons: 'Unassign' and 'Cancel'.

<input type="checkbox"/>	Name	Role
<input type="checkbox"/>	AT-DOI-GMO-010, U	Grants Management Specialist
<input type="checkbox"/>	AT-DOI-GMO-011, U	Grants Management Officer
<input type="checkbox"/>	AT-DOI-GMS-001, U	Grants Management Specialist
<input type="checkbox"/>	AT-DOI-GMS-002, U	Grants Management Specialist
<input type="checkbox"/>	AT-DOI-GMS-011, U	Grants Management Specialist

\* End Date:

The selected staff will be unassigned from any grant program(s) that has existing assignment.

Figure 194: Person-Role Assignment screen – Unassign

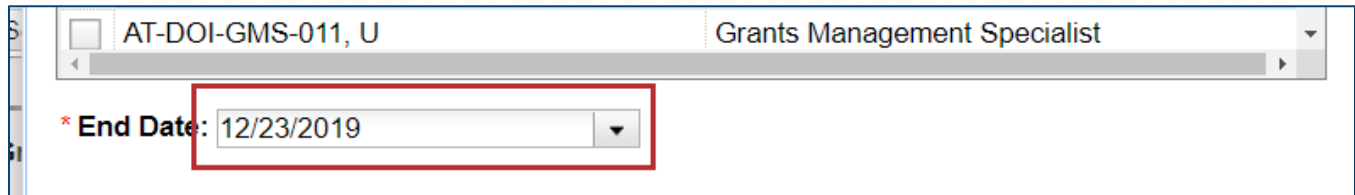
5. The “Person–Role Assignment” window updates to display staff with existing assignments. Click the **checkboxes** next to the names of staff unassign.

This screenshot is a close-up of the 'Select the Staff to unassign:' table from the previous figure. The table has two columns: 'Name' and 'Role'. The first three rows are highlighted in blue, and their checkboxes are checked. The last two rows are not highlighted, and their checkboxes are unchecked. A red rectangle highlights the first three rows, and a blue dashed rectangle highlights the first three checkboxes.

<input type="checkbox"/>	Name	Role
<input checked="" type="checkbox"/>	AT-DOI-GMO-010, U	Grants Management Specialist
<input checked="" type="checkbox"/>	AT-DOI-GMO-011, U	Grants Management Officer
<input checked="" type="checkbox"/>	AT-DOI-GMS-001, U	Grants Management Specialist
<input type="checkbox"/>	AT-DOI-GMS-002, U	Grants Management Specialist
<input type="checkbox"/>	AT-DOI-GMS-011, U	Grants Management Specialist

Figure 195: Person-Role Assignment Screen – Select the Staff to unassign checkboxes

6. Select an **End Date** to designate when to terminate the assignments.



The screenshot shows a web interface for assigning roles. At the top, there is a header bar with a checkbox, the text "AT-DOI-GMS-011, U", and a dropdown menu labeled "Grants Management Specialist". Below this, the "End Date" field is highlighted with a red rectangle. The field contains the date "12/23/2019" and a small downward arrow icon.

Figure 196: Person-Role Assignment Screen – End Date

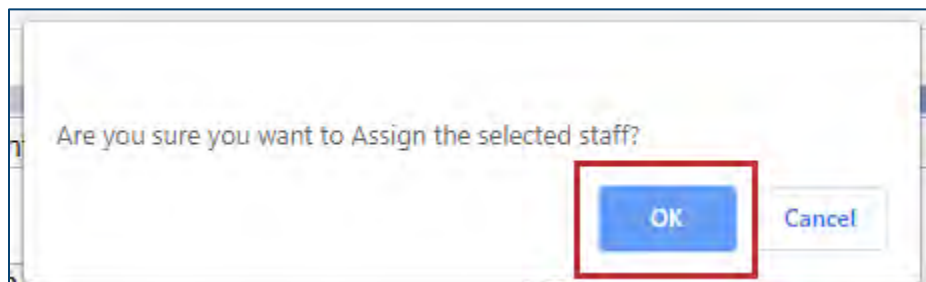
7. Click the **Unassign** button.



The screenshot shows a confirmation message: "The selected staff will be unassigned from any grant program(s) that has existing assignment." Below the message are two buttons: "Unassign" and "Cancel". The "Unassign" button is highlighted with a red rectangle.

Figure 197: Person-Role Assignment Screen - Unassign button

8. The message "Are you sure you want to Unassign the selected staff(s)?" displays. Click the **OK** button.



The screenshot shows a dialog box with the text "Are you sure you want to Assign the selected staff?". Below the text are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red rectangle.

Figure 198: Assignment confirmation message

The "Grants List" screen displays, and the assignment changes are complete.

**Tip:** View the history of the previous assignments from an individual awarded grant project's Expired Grants section.



## Replace Staff

The Replace Staff feature allows one Grantor staff member to replace another Grantor staff member for all assigned Grant Programs.

To Replace Staff for grant projects in bulk, perform the following steps:

1. From the “Grants List” screen, **search** for multiple grant projects.

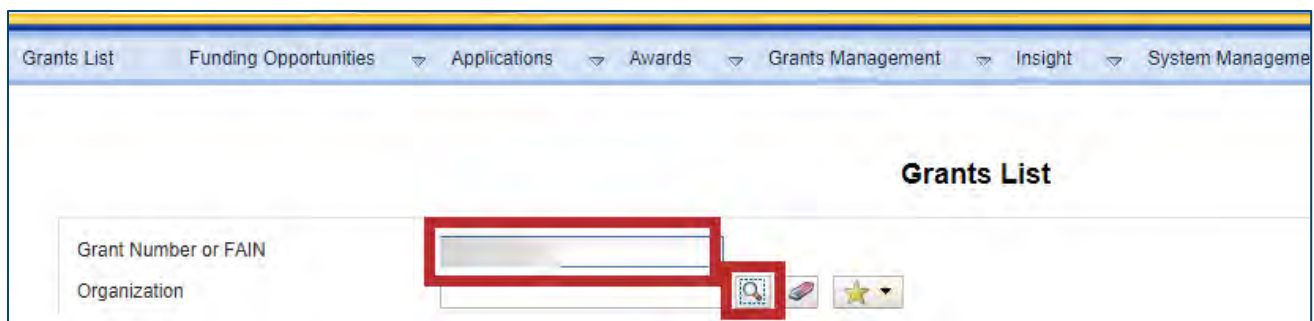


Figure 199: Grants List search

2. The Results table displays. Select the **checkboxes** next to each Financial Assistance project that requires an assignment change.

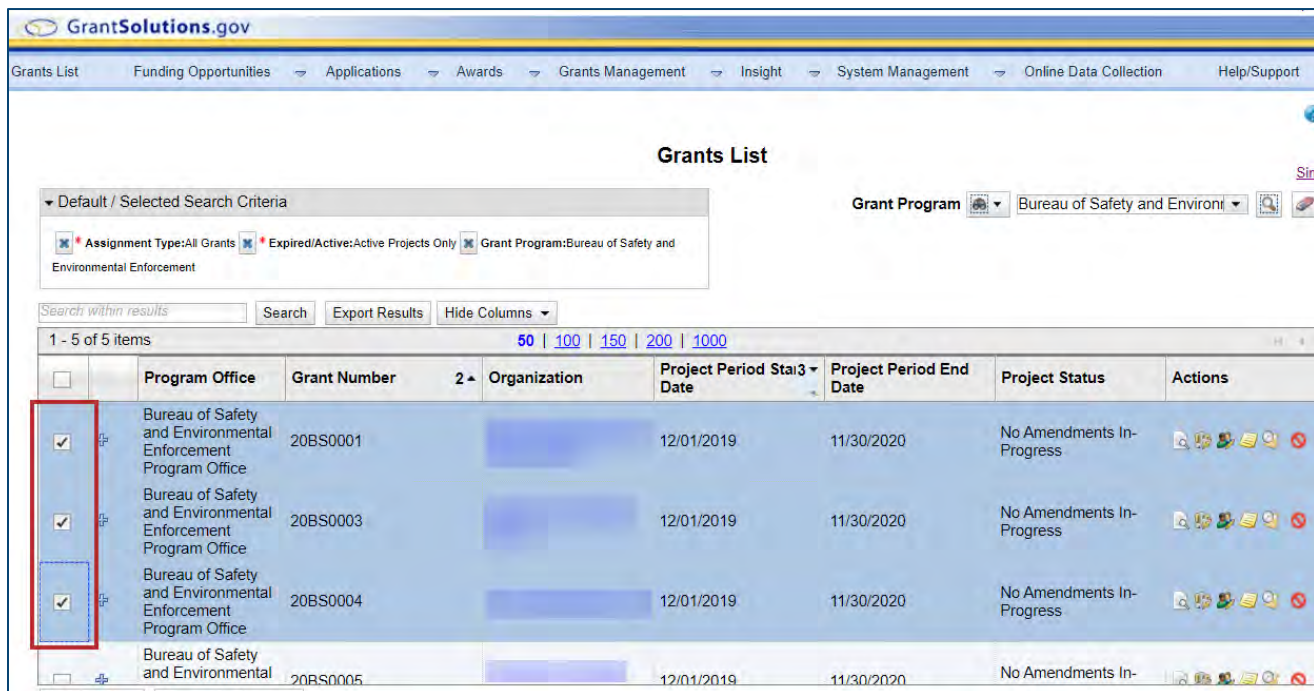


Figure 200: Grants List Screen – Selected checkboxes

- Click the **Manage Assignments** button located below the Results table.

<input checked="" type="checkbox"/>	<input type="checkbox"/>	and Environmental Enforcement Program Office	20BS0003		12/01/2019	11/30/2020	No Amendmen Progress
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Bureau of Safety and Environmental Enforcement	20BS0004		12/01/2019	11/30/2020	No Amendmen Progress
<input type="button" value="Add Bulk Note"/> <input type="button" value="Manage Assignments"/>							

Figure 201: Grants List Screen - Manage Assignments (bulk) button

- The “Person–Role Assignment” screen opens in a new window. Select **Replace** from the Operation drop-down list.

Person-Role Assignment

Operation:

Assign

Role:

Assign

Last Name:

Unassign

Select the Sta

Replace

<input type="checkbox"/>	Name	Role
<input type="checkbox"/>	AT-DOI-GMO-001, U	Grants Management Officer
<input type="checkbox"/>	AT-DOI-GMO-002, U	Grants Management Officer
<input type="checkbox"/>	AT-DOI-GMO-003, U	Grants Management Officer
<input type="checkbox"/>	AT-DOI-GMO-004, U	Grants Management Officer
<input type="checkbox"/>	AT-DOI-GMO-005, U	Grants Management Officer

\* Start Date:

End Date:

12/23/2019

The selected staff will be assigned but will not override existing active assignments

Figure 202: Person-Role Assignment Screen – Replace option

The window refreshes and new options are available for selection.

5. Select a **user** from the Staff to be replaced drop-down list.
6. Select a **user** from the Replace With drop-down list.
7. Select a **Start Date** to activate the replacement.

**Note:** Select an End Date if the replacement assignment has a known termination date.

8. Click the **Replace** button.

Figure 203: Person-Role Assignment Screen – drop-down lists and Replace button

9. The message “Are you sure you want to Replace the selected staff(s)?” displays. Click the **OK** button.

Figure 204: Replace confirmation message – OK button

The “Grants List” screen appears, and the replacement action is complete.

## GRANT NOTES

Use Grant Notes to track internal Grantor communication and external correspondence with Grant Recipients.

Grant Notes have:

- Assigned categories
- Note text
- Optional attachments

To add a Grant Note:

1. Search for a grant project from the “Grants List” screen.

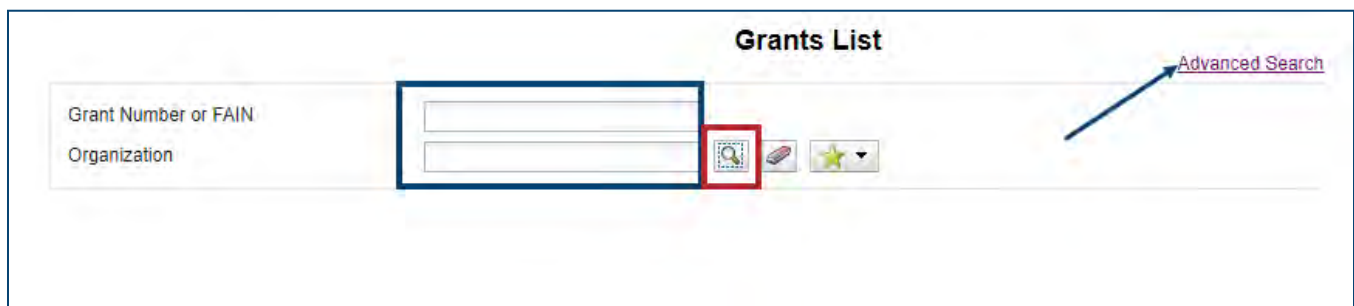


Figure 205: Grants List screen – Search fields and button and Advanced Search link

The Results table displays. From the *Actions* column, click the **Grant Notes** icon.



50   100   150   200   1000						
Grant Number	2 ▾	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
			03/21/2016	10/23/2020	Multiple Amendments In-Progress	 

Figure 206: Grants List Screen – Grant Notes icon

The “Grant Notes” screen displays.

### Grant Notes

Grant Number  
Grantee Name  
Project Start Date 07/10/2010  
Project End Date 07/01/2020

Grant Note Create Date From To  
Grant Note Type --All--  
Grant Note Category --All--  
Author --All--  
Subject  
☒ Hide Automatic Notes

Add Search

Total 2 notes

Subject	Category	Grant Note Type	Author	Date	Support Year	Application Number	Bulk Notes	Action
Purpose	Purpose	Internal		11/01/2011 00:00 (GMT -04:56) EDT	1	-0000	No	
Description	Description	Internal		11/01/2011 00:00 (GMT -04:56) EDT	1	-0000	No	

Add Cancel

Has Attachment
 Edit Note
 Delete Note
 View Note

Figure 207: Grant Notes screen

The top portion of the screen contains the grant project information:

- Grant Number
- Grantee (Grant Recipient) Name
- Project Start and End Date

The middle section contains search fields to locate specific existing Grant Notes.

The search fields are:

- Grant Note Create Date: From and To dates
- Grant Note Type: Internal or Correspondence
- Grant Note Category: Predefined by the Business Analyst and DOI
- Author: Name of the user who created the Grant Note
- Subject: Grant Note subject
- Hide Automatic Notes: The GMM automatically generates workflow notes (hidden by default)

Under the search section, is the Add and Search buttons.

The screenshot displays the 'Grant Notes' interface. At the top, under the heading 'Grant Notes', there is a section for grant project information with the following fields: 'Grant Number' (displaying '10000000'), 'Grantee Name' (displaying 'BIOLOGICAL RESOURCES SERVICE TO BUREAU OF LAND'), 'Project Start Date' (displaying '05/01/2007'), and 'Project End Date' (displaying '09/30/2020'). Below this is a search section containing: 'Grant Note Create Date' with 'From' and 'To' date pickers; 'Grant Note Type' with a dropdown menu showing '--All--'; 'Grant Note Category' with a dropdown menu showing '--All--'; 'Author' with a dropdown menu showing '--All--'; 'Subject' with a text input field; and 'Hide Automatic Notes' with a checked checkbox. At the bottom of the search section are two buttons: 'Add' and 'Search'.

Figure 208: Grant Notes Screen



The table on the Grant Notes screen displays all notes/attachments associated with the grant project.

Total 18 notes 1 2 [Next]

Subject	Category	Grant Note Type	Author	Date	Support Year	Application Number	Bulk Notes	Action
GMS Award Rev Docs	Financial Information	Internal		08/09/2019 15:15 (GMT -04:56) EDT	3	Application # Grant #	No	
corrected_FY19 Technical Review	Funding Packet Information	Internal		05/29/2019 00:10 (GMT -04:56) EDT	3		No	
CAN Allocation Table adjusted \$1	Funding Packet Information	Internal		05/21/2019 15:45 (GMT -04:56) EDT	3		Yes	

Figure 209: Grants Notes Screen – Results table

- Click the **Add** button.

## Grant Notes

Grant Number  
Grantee Name  
Project Start Date 05/01/2007  
Project End Date 09/30/2020

Grant Note Create Date From To  
Grant Note Type --All--  
Grant Note Category --All--  
Author --All--  
Subject  
☒ Hide Automatic Notes

Figure 210: Grant Notes Screen – Add button

3. The “Grant Notes-Add” screen displays. Enter required information in the fields with an asterisk.

**Note:** The author’s name, pre-populates.

**Grant Notes - Add**

Author: [Pre-populated text]

Subject \* [Text input field]

Note Type \* ⓘ ☐ Correspondence ☒ Internal

Category Type \* [Dropdown menu: - Please select -]

Notes \* ⓘ  
(Limit to 2000 characters) [Text area]

Note Attachments [Section header]

Figure 211: Grant Notes - Add Screen

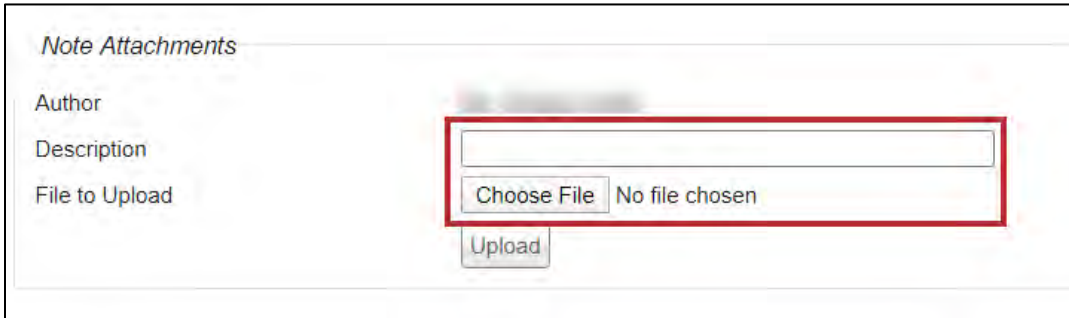
The fields are as follows:

- Subject: Enter the subject of the note. Conform to any naming conventions set by DOI
- Note Type: Correspondence or Internal Radio buttons
- Internal (only visible to Grantor)
- Correspondence (visible to Grantor and Recipient – the Recipient will receive an email with a link to log in and view the note)
- Category Type: A pre-set list of categories. To add or remove custom categories for a grant program, please contact a DOI Partner Success Anal
- Notes: Text field (limit of 2000 characters)



**Optional:** To add an attachment:

1. Enter a required file **Description**.
2. Click the **Choose File** button to select a file from computer.




The screenshot shows a form titled "Note Attachments". It has three input fields: "Author", "Description", and "File to Upload". The "Description" field is highlighted with a red box. Below the "File to Upload" field, there is a "Choose File" button and a "No file chosen" text. Below the "Choose File" button is an "Upload" button.

Figure 212: Grant Notes - Add Screen – Description field and Choose File button

3. Choose a file to attach.

The file name displays next to the *Choose File* button.

4. Click the **Upload** button.



The screenshot shows the same "Note Attachments" form. The "Description" field now contains the text "Sample Document". The "File to Upload" field now contains the text "Test doc.docx". The "Choose File" button is highlighted with a red box. Below the "Choose File" button is an "Upload" button, which is also highlighted with a red box. A blue arrow points to the "Upload" button.

Figure 213: Grant Notes - Add Screen – Filename and Upload button

The file displays in the attachments table. The status column initially states pending while performing a virus scan. Once complete, the status updates to Successful.

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

The screenshot shows the 'Grant Notes - Add' screen. At the top, there are fields for Author, Subject (Site Visit), Note Type (Internal selected), Category Type (Site Visit Report), and Notes (Please see attachment). Below this is the 'Note Attachments' section with fields for Author, Description, and File to Upload (Choose File, No file chosen). An 'Upload' button is present. At the bottom, there is a table with columns: Description, Source Attachments, Status, and Actions. The table contains one row: 'Sample Document', 'Test doc.docx', 'PENDING', and icons for Edit or Delete Attachment. A red box highlights the 'Submit' button at the bottom left. A blue arrow points from the 'Attachment' label to the 'Test doc.docx' entry in the table. Another blue arrow points from the 'Edit or Delete Attachment' label to the icons in the Actions column.

Description	Source Attachments	Status	Actions
Sample Document	Test doc.docx	PENDING	Edit or Delete Attachment

Figure 214: Grant Notes - Add screen – Submit button

**Note:** The option to edit (spiral note pad with a pencil icon) and delete (trash icon) an attachment is available.

Once a note is submitted, it is viewable at any time.

**Important:** Only the author of a note can see the edit or delete icons.

**Note:** Grantors and Grant Recipients only receive email notifications for Correspondence Notes. When users receive Correspondence Notes email notifications, they must log into the GrantSolutions GMM to view the Grant Note.

## HISTORY

Use the History icon to view the entire history of an awarded grant project, including all applications submitted and awarded.

To view the history of a grant project:

1. Search for awarded grant projects from the “Grants List” screen.

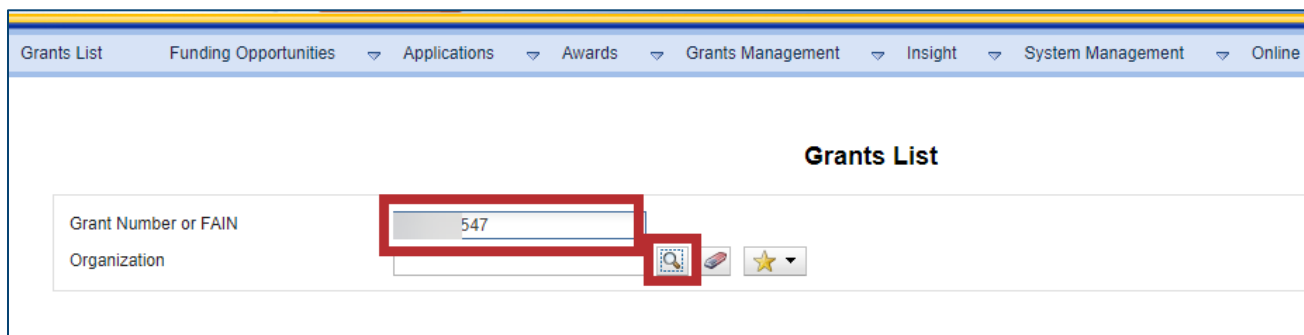


Figure 215: Grants List screen

2. The Results table displays. Locate the desired awarded grant project.
3. From the *Actions* column, click the **History** icon.


50   100   150   200   1000						
Grant Number	2 ▲	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
			03/21/2016	10/23/2020	Multiple Amendments In-Progress	

Figure 216: Grants List Screen – History icon

The “Grant History” screen displays. The most recent application is available at the top of the screen.

The table below contains the following information of the columns on the “Grant History” screen:

Column	Description
<b>Application Number</b>	Link to the GrantSolutions Application Control Checklist screen
<b>Grant Number</b>	Award number, Amendment number, and Budget Period
<b>Action Date</b>	The date the Action was initiated
<b>Project Period</b>	Project Period start and end dates
<b>Budget Period</b>	Budget Period start and end dates
<b>Award Amount</b>	Amount awarded this action
<b>Application Type</b>	Type of application  Examples are New, Post Award Amendment, Directed Supplement, and Closeout
<b>Status</b>	The status of the application in the award process  Examples are Awarded, Amended, (Amendment) Approved (Processing)
<b>Action</b>	Links to: View Application: View the submitted application package View Memo: View the Funding Memo Budget Worksheet: View the Budget Worksheet Award Summary: View award information, including amounts and financial accounts Award Workflow History: View the award approval history – including comments View Terms & Conditions: View award Terms & Conditions

Table 22: Grant History screen – Column names

### Grant History

Grantee Name: [Redacted]

Project Title: [Redacted]

Project Period: 05/01/2007 to 09/30/2020

Budget Year: 1










Application Number	Grant Number	Action Date	Project Period	Budget Period	Award Amount	Application Type	Status	Action
	Amendment Number:12 Budget Period:1	12/19/2019	05/01/2007 to 09/30/2020	05/01/2007 to 09/30/2020		Post Award Amendment (Supplement (Administrative))	(Amendment) Approved (Processing)	<a href="#">View Application</a> <a href="#">View Memo</a>
	Amendment Number:11 Budget Period:1	09/29/2017	05/01/2007 to 09/30/2020	05/01/2007 to 09/30/2020	\$0.00	Post Award Amendment (Revision (NoA Other))	Awarded	<a href="#">View Application</a> <a href="#">Budget Worksheet</a> <a href="#">View Memo</a> <a href="#">View NGA</a> <a href="#">Award Summary</a> <a href="#">Award Workflow History</a> <a href="#">View Terms &amp; Conditions</a>
	Amendment Number:10 Budget Period:1	06/23/2017	05/01/2007 to 09/30/2020	05/01/2007 to 09/30/2020	\$0.00	Post Award Amendment (Revision (NoA Other))	Amended	<a href="#">View Application</a> <a href="#">Budget Worksheet</a> <a href="#">View Memo</a> <a href="#">View NGA</a> <a href="#">Award Summary</a> <a href="#">Award Workflow History</a> <a href="#">View Terms &amp; Conditions</a>
	Amendment Number:9 Budget Period:1	09/23/2016	05/01/2007 to 09/30/2020	05/01/2007 to 09/30/2020	\$4,182,836.00	Directed Supplement	Amended	<a href="#">View Application</a> <a href="#">Budget Worksheet</a> <a href="#">View Memo</a> <a href="#">View NGA</a> <a href="#">Award Summary</a> <a href="#">Award Workflow History</a> <a href="#">View Terms &amp; Conditions</a>
	Amendment Number:8 Budget Period:1	03/25/2016	05/01/2007 to 09/30/2016	05/01/2007 to 09/30/2016	\$0.00	Post Award Amendment (Extension without Funds )	Amended	<a href="#">View Application</a> <a href="#">Budget Worksheet</a> <a href="#">View Memo</a> <a href="#">View NGA</a> <a href="#">Award Summary</a> <a href="#">Award Workflow History</a> <a href="#">View Terms &amp; Conditions</a>
	Amendment Number:7 Budget Period:1	02/26/2015	05/01/2007 to 03/31/2016	05/01/2007 to 03/31/2016	\$2,372,290.00	Directed Supplement	Amended	<a href="#">View Application</a> <a href="#">Budget Worksheet</a> <a href="#">View Memo</a> <a href="#">View NGA</a> <a href="#">Award Summary</a> <a href="#">Award Workflow History</a> <a href="#">View Terms &amp; Conditions</a>
	Amendment Number:6 Budget Period:1	06/19/2014	05/01/2007 to 03/31/2016	05/01/2007 to 03/31/2016	\$4,204,803.00	Directed Supplement	Amended	<a href="#">View Application</a> <a href="#">Budget Worksheet</a> <a href="#">View Memo</a> <a href="#">View NGA</a> <a href="#">Award Summary</a> <a href="#">Award Workflow History</a> <a href="#">View Terms &amp; Conditions</a>
	Amendment Number:5 Budget Period:1	04/11/2012	05/01/2007 to 03/31/2016	05/01/2007 to 03/31/2016	\$1,120,122.00	Post Award Amendment (Supplement and Revision)	Amended	<a href="#">View Application</a> <a href="#">Budget Worksheet</a> <a href="#">View Memo</a> <a href="#">View NGA</a> <a href="#">Award Summary</a> <a href="#">Award Workflow History</a> <a href="#">View Terms &amp; Conditions</a>
	Amendment Number:4 Budget Period:1	06/02/2011	05/01/2007 to 03/31/2016	05/01/2007 to 03/31/2016	\$0.00	Post Award Amendment (Extension	Amended	<a href="#">View Application</a> <a href="#">Budget Worksheet</a> <a href="#">View Memo</a>

Figure 217: Grant History Screen

4. Click the **Close** button to return to the “Grants List” screen.

	Amendment Number:1 Budget Period:1	07/24/2008	05/01/2007 to 09/30/2011	05/01/2007 to 09/30/2011	\$77,466.00	Post Award Amendment (NGA Revision)	Amended	<a href="#">View Application</a> <a href="#">Budget Worksheet</a> <a href="#">View NGA</a> <a href="#">Award Summary</a> <a href="#">Award Workflow History</a> <a href="#">View Terms &amp; Conditions</a>
	Amendment Number:0 Budget Period:1	05/01/2007	05/01/2007 to 09/30/2011	05/01/2007 to 09/30/2011	\$132,537.00	New	Amended	<a href="#">View Application</a> <a href="#">Budget Worksheet</a> <a href="#">View NGA</a> <a href="#">Award Summary</a> <a href="#">Award Workflow History</a> <a href="#">View Terms &amp; Conditions</a>



Figure 218: Grant History screen - Close button




## ELECTRONIC GRANT FILE (EGF)

The GrantSolutions Electronic Grant File is used by Grantors to view and export documentation associated with an awarded Grant Project from a single location.

The Electronic Grant File contains the following documentation for awarded and historical awards:

- Original Submission Applications
- Online Forms
- Application Enclosures
- Application Attachments
- Post Submission Documents
- Application and Grant Notes
- Project Assessments
- Funding Memo Attachments
- Project Abstract
- Notice of Award

To access the Electronic Grant File (EGF) for an award:

1. Launch GrantSolutions GMM and search for an award on the “Grants List” screen.
2. When the Results table appears, click either the **Grant Number** link or the **EGF icon** (  ) from the *Actions* column.


	Program Office	Grant Program	1 ▾	Grant Number	2 ▾	Organization	Project Period3 Start Date	Project Period End Date	Project Status	Actions
<input type="checkbox"/>				<a href="#">[Link]</a>			09/30/2015	09/29/2021	Amendment Approved (Processing)	

Figure 219: Grant List screen - Results table: Grant number link and EGF icon



The “Electronic Grant File – Project Documents” screen opens in a new browser tab. The page contains the following sections:

- *Project information:* Read-only information about the Grant Project
- *Search section:* Refine search results, export search results, and save searches
- *Results table:* Table containing all available documents associated with the Project
- *PDF and Zip Extract buttons:* Save selected documents as a PDF or Zip file

The screenshot shows the 'Electronic Grant File' interface. At the top, there's a header with the GrantSolutions logo and navigation tabs for 'DOCUMENTS' and 'EXTRACTS'. The user is logged in as 'NBROWN9'. The main section is titled 'PROJECT DOCUMENTS'. Below this, there's a 'Project Information' box containing fields for Organization Name, Grant#, Duns, Number Of Budget Periods (3), and Number Of Amendments (1). It also shows the Total Award Amount (\$309,428.00) and Project Period Dates (2016-03-01 - 2021-02-28). Below the information box is a 'Search Section' with dropdowns for Budget Period and Source, and buttons for SEARCH, ADVANCE SEARCH, and EXPORT SEARCH RESULTS. At the bottom is a 'Results Table' showing a list of documents. A red arrow points from the 'Project Information' callout to the Project Information box. Another red arrow points from the 'Search Section' callout to the search buttons. A third red arrow points from the 'Results Table' callout to the table header.

Document Name	Description	Source	Award Number	Application Type	Date Uploaded	Amendm...	Budget Period	Created By
Notice Of Award	01 Annual Funding Non-Competing Continuation Remarks	Awards Processing	01 - 00	Non-Competing Continuation	2/26/2017	Initial Review	BP2 (2/28/2017 - 2/27/2018)	1

Figure 220: Electronic Grant File screen – Sections

This screenshot shows the bottom section of the 'Electronic Grant File' interface. It includes a pagination bar with 'Show 20 records per page. Page 1 of 2. Total 24 records.' and navigation buttons. Below this are two large buttons: 'GENERATE PDF EXTRACT' and 'GENERATE ZIP EXTRACT'. A red arrow points from a callout box labeled 'PDF and Zip Extract Buttons' to the 'GENERATE ZIP EXTRACT' button.

Figure 221: Electronic Grant File screen – Extract Buttons

To learn more information about EGF, please refer to the EGF guide.

## TRACK FUNDING RESTRICTIONS

Grantors can now officially document and track funding restrictions in the GrantSolutions GMM.

**Note:** GrantSolutions does not connect with the Payment Management System. Grantors still need to add and remove holds on funds in their financial system.

Grants Management Officers (GMOs) and Grants Management Specialists (GMS) can:

- Add funding restrictions to draft awards in progress in GrantSolutions
- View existing funding restrictions
- Approve or return a Grant Recipient response to a funding restriction
- Release a funding restriction on a Notice of Award via a post-award amendment

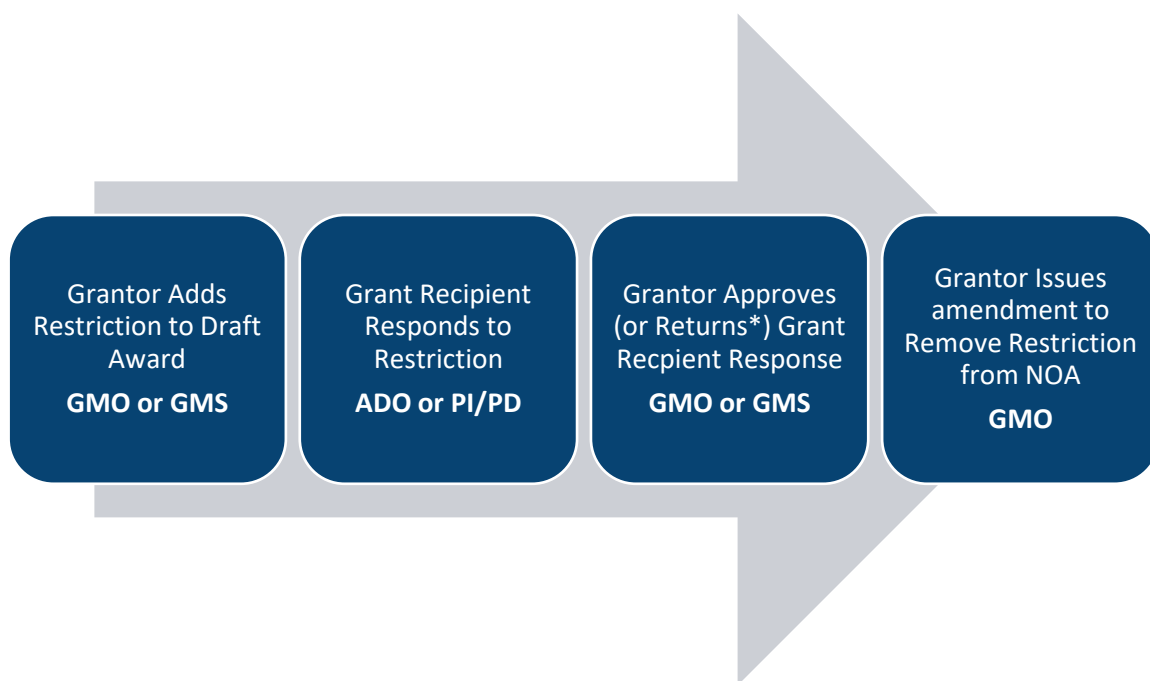
All other Grantor roles can view existing funding restrictions by clicking the **Funding Restrictions** icon from the “Grants List” screen.

Grant Recipients (Grantee Authorizing Officials and Principle Investigators/Program Directors assigned to a grant project) can click the **Funding Restrictions** link from the “My Grants List” screen to:

- View a funding restriction
- Add an attachment
- Submit a response to a funding restriction

All other Grant Recipient roles can view existing funding restrictions.

The GrantSolutions Funding Restriction workflow is as follows:



\* When a response is returned, the Grant Recipient is notified that updates are needed.

To access the Track Funding Restrictions:

1. Launch GrantSolutions GMM and search for a grant on the “Grants List” screen.
2. From the *Actions* column of the Results table, click the **Funding Restrictions** icon.




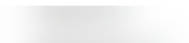
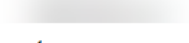
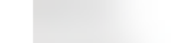
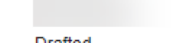

er 2 ▲	Organization	Project Period3 Start Date	Project Period End Date	Project Status	Actions
		09/30/2015	09/29/2021	Amendment Approved (Processing)	 

Figure 222: Grants List screen - Results table: Funding Restrictions icon

**Note:** Another location to access the Funding Restrictions is from the “Award Overview” screen.

### Award Overview

Organization:	GS Training Center		
Project Title:	CED Healthy Food Financing Initiative Projects		
DUNS:		CCR EIN:	
Grant Number:		Approved Amount:	\$0.00
Amendment Number:	1	Funds Restricted:	No
Budget period Number:	1	Project Period:	09/30/2014 - 09/29/2019
FAIN:		Budget Period:	09/30/2014 - 09/29/2019
Application Number:		Application Type:	Amendment ( NGA Revision )
Workflow Status:	Drafted	Last Updated By/Date:	 - 11/15/2018

<b>Award Preparation</b> <a href="#">Edit/Validate Organization</a> <a href="#">Select Org Address</a> <a href="#">Project Assignments</a> <a href="#">Budget Worksheet</a> <a href="#">Terms and Conditions</a> <div style="border: 2px solid red; padding: 2px;"><a href="#">Funding Restrictions</a></div> <a href="#">Manage Commitments</a> <a href="#">Manage Project Abstract</a> <a href="#">Application Notes</a> <a href="#">Edit Notice of Award</a>	<b>Award Actions</b> <a href="#">Ready for Review</a> <a href="#">Delete Notice of Award</a>	<b>Award Information</b> <a href="#">Application</a> <a href="#">Award Workflow History</a> <a href="#">Next Workflow Actions</a> <a href="#">Funding Memo</a> <a href="#">Grant History</a> <a href="#">View/Print Last Notice of Award</a> <a href="#">Award Summary</a> <a href="#">View/Print Notice Of Award</a>
--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Figure 223: Award Overview screen - Funding Restrictions link