

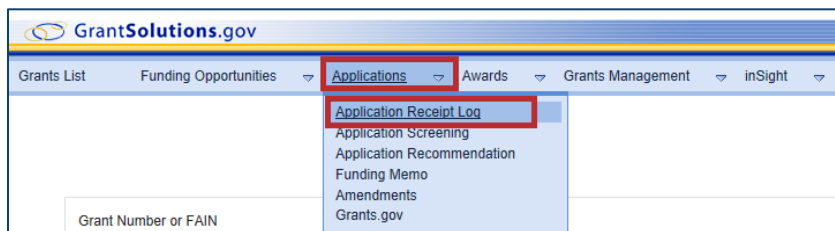
Quick Sheet: Intake Review

Audience: Grantors (Grant Office role)

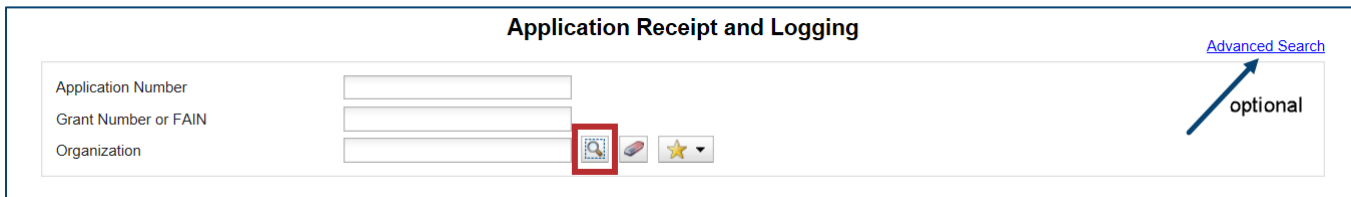
COMPLETING THE INTAKE REVIEW

Once a new application is in the *Complete* status, the Intake Review is conducted. The Intake Review determines if an applicant is eligible for a grant.

1. Log into the GrantSolutions GMM (www.grantsolutions.gov).
2. The “Grants List” screen appears. From the menu bar, select **Applications > Application Receipt Log**.



3. The “Application Receipt and Logging Simple Search” screen appears. Use this screen or click the optional **Advanced Search** link to search for an application. Enter full or partial information in a search field and click the **Search** icon (magnifying glass).

A screenshot of the 'Application Receipt and Logging' search interface. It features three input fields for 'Application Number', 'Grant Number or FAIN', and 'Organization'. To the right of these fields is a search bar with a magnifying glass icon, which is highlighted with a red box. Further right, there is a link for 'Advanced Search' with an arrow pointing to it and the word 'optional' below it. At the bottom right of the search area, there are icons for a magnifying glass, a pencil, a star, and a dropdown arrow.

4. The “Application Receipt and Logging” screen refreshes. The search results display in a table below the search fields. An option to search within results is available.
5. Locate the desired application and click the **Intake Review** icon.

Search within results Search Export Results Hide Columns

1 - 35 of 35 items optional 60 | 100 | 150 | 200 | 3000

	Submission Date	Application #	Application Type	Announcement	Grant Program	Organization	Budget Period End Date	Actions
<input type="checkbox"/>	06/16/2016 11:59:06 AM		New				N/A	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/>	06/13/2016 11:46:47 PM		New			Center	N/A	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/>	04/04/2016 04:41:15 PM		New		Program		N/A	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/>	08/25/2015 12:00:00 AM		New			Inc.	N/A	<input type="radio"/> <input type="radio"/> <input type="radio"/>

6. The “Intake Review” screen appears. Answer each question by clicking the **Yes**, **No**, or **N/A** radio button.

Note: The amount and type of questions that appear will vary.

7. In the *Eligibility* section, select one of three statuses from the drop-down list:

- *In Review*: The Intake Review is still in progress. The application status has not changed to Yes (move forward as eligible) or No (marked as ineligible).
- *Yes*: Application continues to Program Review.
- *No*: Application continues to the Grants Management Officer (GMO) for ineligibility signoff.

8. When the *Question* and *Eligibility* sections are complete, click the **Save** button.

Note: Questions with red asterisks are required.

Intake Review

★ indicates a required field.

Application Notes

Program Office

Program Name

Grant Program

Grants Servicing Office

Applicant/Grantee Name

City

State

Type of Application

Application Number

Grant Number

Year of Support

WY

New

NIA

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Question	Answer
1. Has the grantee ever had any findings and/or concerns on issued compliance monitoring reports or warning letters for a current HOPVA grant or other related grants? (FO Review Form)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> NIA
2. Does the grantee currently have any unresolved findings and/or concerns on issued compliance monitoring reports or warning letters for a current HOPVA grant or other related grants? (FO Review Form)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> NIA
3. Have any significant compliance issues been identified, but not addressed through issued notice? (FO Review Form)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> NIA
4. Will the grantee be unable to resolve outstanding findings, concerns, and/or other compliance issues by April 2017? (FO Review Form)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> NIA
5. Has the grantee submitted untimely and/or incomplete performance reports? (FO Review Form)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> NIA
6. Is there evidence of weak financial management? (FO Review Form)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> NIA
7. Has the grantee expended their existing grant award in an erratic manner with significant	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> NIA
8. Does the grantee have a large unexpended balance on their expiring grant that could impede the grantee's ability to execute a new grant in a responsible and timely manner? (FO Review Form)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> NIA
9. Have other issues been identified including, but not limited to a documented misuse of HOPVA funds, delays in program implementation, significant reduction in households/units assisted, or unresolved citizen complaints? (FO Review Form)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> NIA
10. Does the Field Office recommend this grant for an FY17 renewal? (FO Review Form)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> NIA

Eligibility

Is the application Eligible? ★ ⓘ

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If yes, application will continue to Program Review

* If No, application will continue to GMO for ineligibility signoff

* If In Review, application is being reviewed

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