

Quick Sheet: Processing New Competing Applications

Audience: Program Office (PO Role)

PURPOSE

The purpose of this Quick Sheet is to provide instructions for processing New Competing applications. The four main steps for the Program Office are as follows:

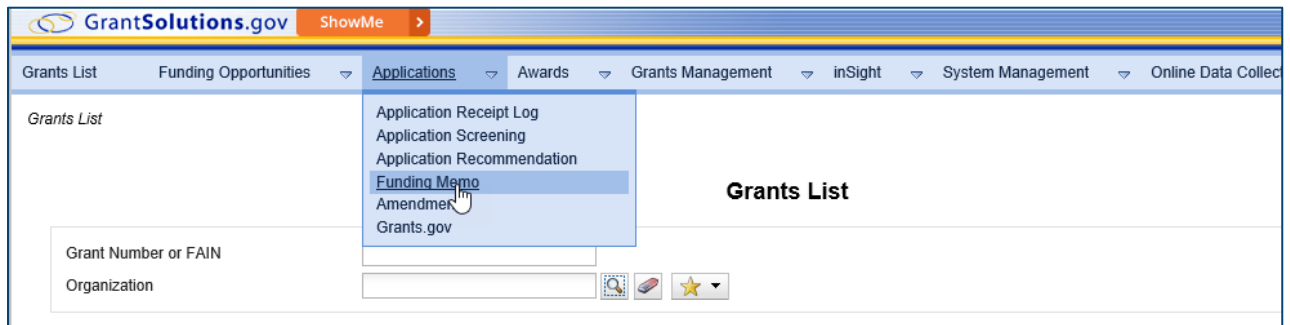
- *Application Recommendation (not covered in this document)*
- **Create and Save Funding Memo**
- **Edit Budget Worksheet**
- **Recommend Funding Memo**



This document begins with the “Create Funding Memo” step.

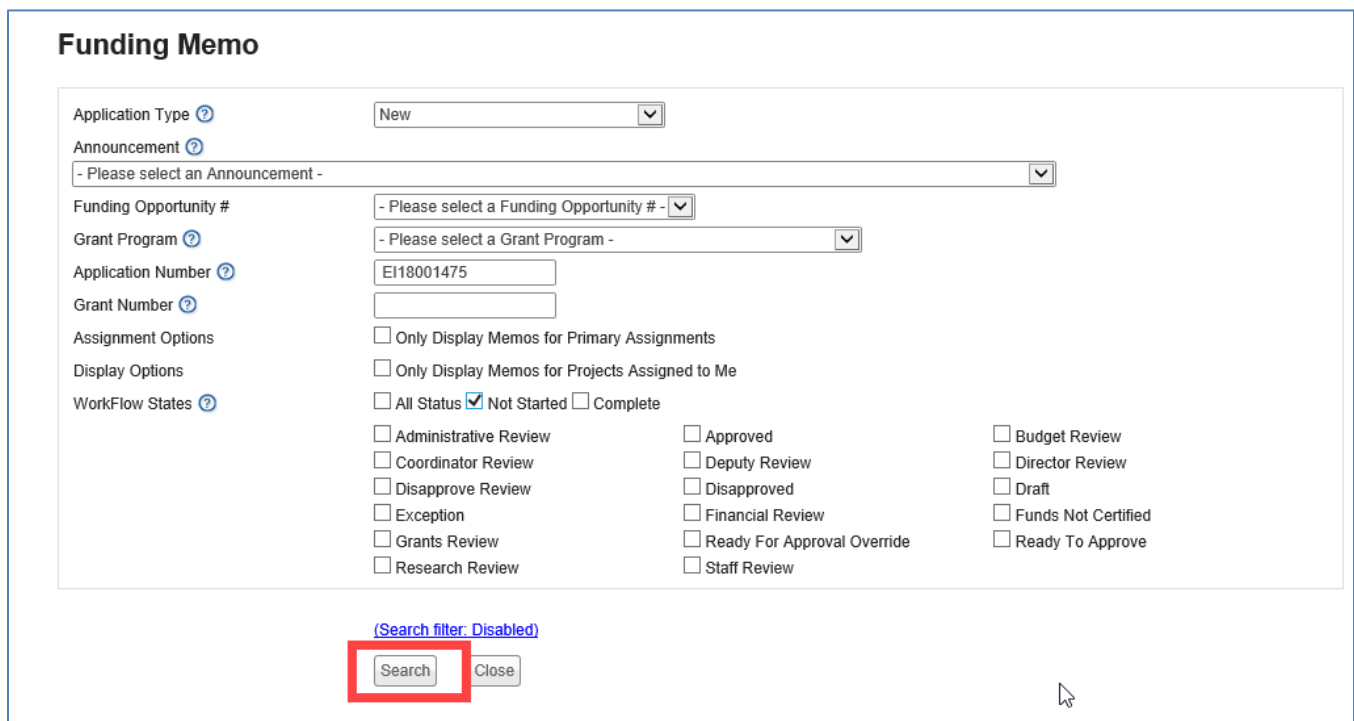
LOGIN

1. Login to the GrantSolutions Grants Management Module (GMM) (www.grantsolutions.gov).
2. From the GMM menu bar, select **Applications – Funding Memo**.



The screenshot shows the GrantSolutions.gov website. The top navigation bar includes 'Grants List', 'Funding Opportunities', 'Applications', 'Awards', 'Grants Management', 'inSight', 'System Management', and 'Online Data Collect'. The 'Applications' menu is open, showing options: 'Application Receipt Log', 'Application Screening', 'Application Recommendation', 'Funding Memo' (highlighted), 'Amendment', and 'Grants.gov'. Below the menu, there are input fields for 'Grant Number or FAIN' and 'Organization', and a 'Search' button.

3. The “Funding Memo” screen appears. To locate an application, enter **search criteria** in one or more fields. Click the **Search** button.



The screenshot shows the 'Funding Memo' screen. It contains several dropdown menus and input fields for search criteria: 'Application Type' (set to 'New'), 'Announcement' (set to '- Please select an Announcement -'), 'Funding Opportunity #' (set to '- Please select a Funding Opportunity # -'), and 'Grant Program' (set to '- Please select a Grant Program -'). There are also input fields for 'Application Number' (containing 'EI18001475') and 'Grant Number'. Below these are checkboxes for 'Assignment Options' and 'Display Options'. At the bottom, there is a 'Search' button highlighted with a red box, and a 'Close' button. A note '(Search filter: Disabled)' is visible above the 'Search' button.

4. Results matching the search criteria appear in a table below the search fields.

Funding Memo

Application Type [?](#)

Announcement [?](#)

Funding Opportunity #

Grant Program [?](#)

Application Number [?](#)

Grant Number [?](#)

Assignment Options ☐ Only Display Memos for Primary Assignments

Display Options ☐ Only Display Memos for Projects Assigned to Me

Workflow States [?](#) ☐ All Status ☒ Not Started ☐ Complete

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

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

Total Records Count: 1

Select <input type="checkbox"/>	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
<input type="checkbox"/>	EI18001475 New		GS Training Center	Central Office	Federal: \$250,000.00 Non-Federal: \$0.00	Not Started Federal: \$0.00 Non-Federal: \$0.00	Project Locale :	Create Manage Commitment View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Business Review

CREATE AND SAVE FUNDING MEMO

- From the *Action* column, select the **Create** link.

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 [?]

EI18001475

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

☐ Administrative Review
☐ Coordinator Review
☐ Disapprove Review
☐ Exception
☐ Grants Review
☐ Research Review

☐ Approved
☐ Deputy Review
☐ Disapproved
☐ Financial Review
☐ Ready For Approval Override
☐ Staff Review

☐ Budget Review
☐ Director Review
☐ Draft
☐ Funds Not Certified
☐ Ready To Approve

(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	Categories/Locale	Action
<input type="checkbox"/>	EI18001475 [?] New		GS Training Center	Central Office	Federal: \$250,000.00 Non-Federal: \$0.00	Not Started Federal: \$0.00 Non-Federal: \$0.00 Next Workflow Actions	Project Locale :	Create Business Commitment View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Business Review

- The “Program Recommendation and Funding Memorandum” screen appears.

Project and Budget Period *start and end date* fields can be modified in the top section of the screen.

The recommended amounts previously entered on the “Application Recommendation” screen automatically populate in the *Basic Operations* section. This field is editable.

Program Recommendation and Funding Memorandum

Type of Action: New

Application/Grant Number: EI18001475/

Project Period: 9/1/2018 Through 8/31/2022

Budget Period: 9/1/2018 Through 8/31/2022

Grantee Name: GS Training Center

Address Line 1: 1845 Haddon Ave

Address Line 2:

Address Line 3:

City/State/Zip: Camden NJ 08103

Director Of Project

Name: Smith John

Address Line 1:

Address Line 2:

Address Line 3:

City/State/Zip:

Phone Number: 301-5551515

Recommended Funding Financial Assistance				
	Federal Amount	Non-Federal Amount	Total Amount	Purpose
Basic Operations	250000.00	0.00	\$250000.00	
Special Projects	0.00	0.00	\$0.00	
Other Special Projects	0.00	0.00	\$0.00	
Other Projects	0.00	0.00	\$0.00	
Other	0.00	0.00	\$0.00	

Note: To make changes to the amounts on the “Application Recommendation” screen, first delete the Funding Memo by clicking **Delete** from the “Funding Memo” Action column.

- Scroll to the bottom of the screen and click the **Save** button to return to the “Funding Memo” screen.

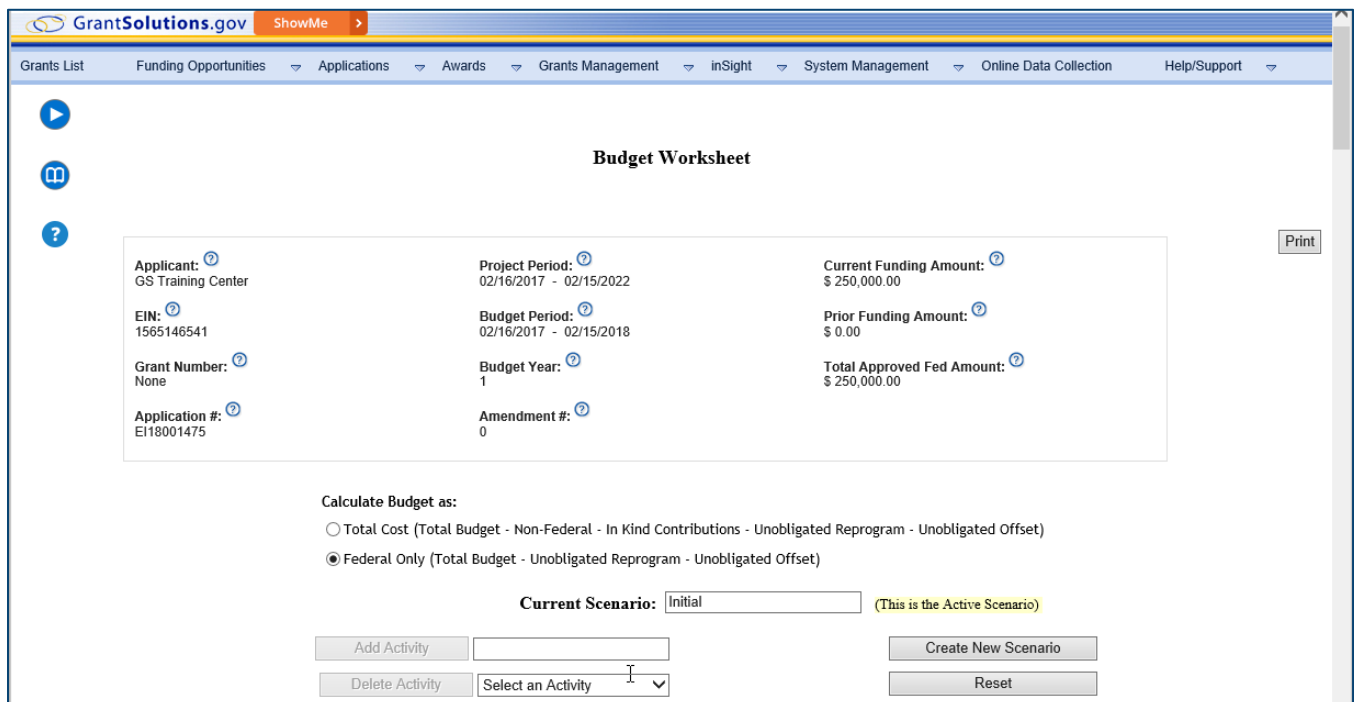
EDIT THE BUDGET WORKSHEET

- After saving the Funding Memo, the next step is to view and, if needed, edit the Budget Worksheet. From the "Funding Memo" *Actions* column, click the **Budget Worksheet** link.

Total Records Count: 1

Select <input type="checkbox"/>	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
<input type="checkbox"/>	EI18001475 New		GS Training Center	Central Office	Federal: \$250,000.00 Non-Federal: \$0.00	Draft Federal: \$250,000.00 Non-Federal: \$0.00 Next Workflow Actions	Project Locale :	Delete Edit History Manage Commitment View View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Recommend

- The "Budget Worksheet" appears.
 - The amounts entered electronically in section B of the SF-424A appear in the *Direct Cost* section of the Budget worksheet in the *Requested* and *Recommended* columns.
 - Each activity entered in Section A of the SF-424A becomes a new tab on the Budget Worksheet.



GrantSolutions.gov ShowMe >

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

Budget Worksheet

Print

Applicant: GS Training Center

EIN: 1565146541

Grant Number: None

Application #: EI18001475

Project Period: 02/16/2017 - 02/15/2022

Budget Period: 02/16/2017 - 02/15/2018

Budget Year: 1

Amendment #: 0

Current Funding Amount: \$ 250,000.00

Prior Funding Amount: \$ 0.00

Total Approved Fed Amount: \$ 250,000.00

Calculate Budget as:

☐ Total Cost (Total Budget - Non-Federal - In Kind Contributions - Unobligated Reprogram - Unobligated Offset)

☒ Federal Only (Total Budget - Unobligated Reprogram - Unobligated Offset)

Current Scenario: Initial (This is the Active Scenario)

Add Activity

Delete Activity Select an Activity

Create New Scenario

Reset

3. **Enter or modify** funds in the *Recommended* column.

Amounts are transferred from the SF-424A

Select an Activity ▼

Select an Activity ▼

Select Scenario ▼

EI - Assets For Independence Demonstration

Direct Cost (EI - Assets For Independence Demonstration)

Category	Requested Agency Adjusted Requested	Adjustment	Recommended	Total	Federal	Unobligated Balance
Personnel	200,000.00	0.00	200000.00	200,000.00	200,000.00	0.00
Fringe Benefits	0.00	0.00	0.00	0.00	0.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	50,000.00	0.00	50000.00	50,000.00	50,000.00	0.00
Supplies	0.00	0.00	0.00	0.00	0.00	0.00
Contractual	0.00	0.00	0.00	0.00	0.00	0.00
Facilities/Construction	0.00	0.00	0.00	0.00	0.00	0.00
	0.00					

Modify the amounts in the Recommended column

- Once all changes are made, scroll to the *Final Budget Totals* section towards the bottom of the screen and verify the amount in the *Total This Action* box is accurate.

Final Budget Totals	
Total Budget ?	250,000.00
Non-Federal (May Include Program Income) ?	<input type="text" value="0.00"/>
Federal ?	250,000.00
Unobligated Funds - Reprogram	0.00
Unobligated Funds Offset	<input type="text" value="0.00"/>
In Kind Contribution ?	<input type="text" value="0.00"/>
Program Income ?	0.00
Total This Action ?	250,000.00

Fed Negotiator ?	<input type="text"/>
Grantee Negotiator ?	<input type="text"/>
Start By: ?	AWalters1 08/01/2018 04:21:09 PM
Last Update By: ?	AWalters1 08/01/2018 04:26:04 PM

Note: When the “Budget Worksheet” contains more than one tab, select the *Totals* tab to access the *Final Budget Totals* section.

- Click the **Save and Verify** button.
- When changes are saved successfully, click the **Close** button.
- The “Funding Memo” screen appears.

RECOMMEND FUNDING MEMO

1. The next step is to Recommend the Funding Memo. From the *Action* column, click the **Recommend** link to begin moving the application through the approval workflow.

Note: Click the **Budget Worksheet** link to view a read-only version of the Budget Worksheet.

ies/Locale	Action
	Delete Edit History Manage Commitment Set Budget Period View Grant Notes Manage Project Abstract Project Assignments Budget Worksheet Recommend

2. The “Action Requested: Recommend” screen appears in a new window. Enter a **comment** if needed and click the **OK** button.
3. The “Funding Memo” screen reappears, and the Memo is ready for the next step in the approval process.