Project Assessment

GrantSolutions GMM

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Lesson 1: Introduction to Project Assessment

OBJECTIVES

At the end of this lesson, the user will be able to:

- Understand Project Assessment functionality
- Launch Project Assessment
- Understand the steps required to create a new Assessment Questionnaire

PROJECT ASSESSMENT OVERVIEW

Project Assessment allows grantors to create quantitative or qualitative assessment questionnaires to measure Key Performance Indicators (KPIs) of grant projects or applications. The Project Assessment tool includes a variety of assessment types to accommodate business needs. Assessments, performed by grantors, are saved as part of the grant or application record history and are available for reporting purposes.

The Project Assessment tool offers flexible questionnaire patterns, online help, quick searching and sorting, and greater visibility into the current status of grants records.

To access Project Assessment from the Grants Management Module (GMM) menu bar, select **Grants Management ➔ Project Assessment**.

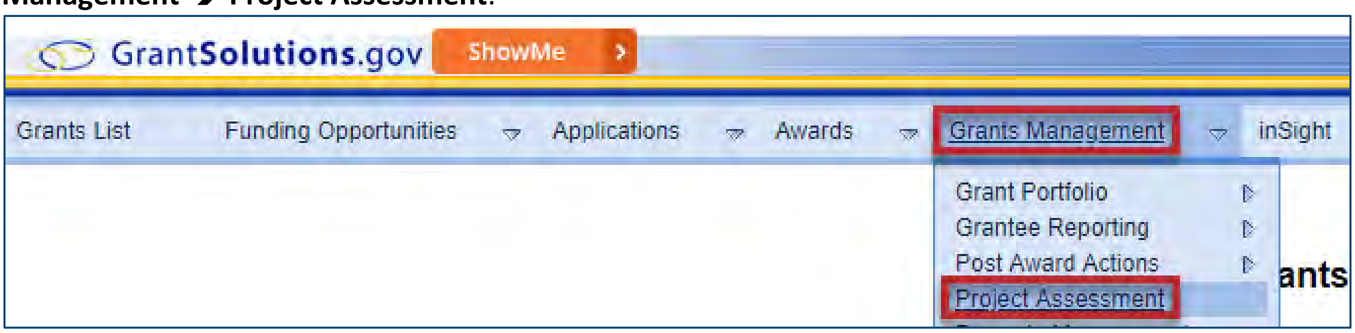

Figure 1: GMM Menu bar - Grants Management > Project Assessment

The “Manage Questionnaire” screen appears. This screen is the starting point for creating and maintaining assessment questionnaires.

There are three basic steps required to create a new questionnaire and make it available to respondents:

1. Create the questionnaire
2. Add questions
3. Activate the questionnaire

Lesson 2: Project Assessment Step-by-Step

OBJECTIVES

At the end of this lesson, the user will be able to:

- Create a new Questionnaire
- Add questions to the questionnaire
- Review and edit questions
- Activate the questionnaire
- Complete a questionnaire
- Print a questionnaire

STEP 1: CREATE A NEW QUESTIONNAIRE

The first step in the process is to create the questionnaire in GrantSolutions (GS). Prior to creating the questionnaire in GrantSolutions, pre-planning and preparation will ensure efficiency and accuracy.

Users will find it helpful to have a list of all questions, answer types, and answer options prepared in advance. Users will also need to know which questions will be answered by the Grants Office and which will be answered by the Program Office.

Topics to consider before creating the questionnaire include:

- Will the assessment questionnaire apply to applications or grants?
- Will respondents include Grants Office, Program Office, or both?
- Which questions will require an answer?
- Which questions will allow attachments and/or comments?
- What additional guidance and instructions for each question should be provided to the respondents?
- What is the due date?

To create a new Questionnaire:

1. From the “Manage Questionnaire” screen, select a **Grant Program**.

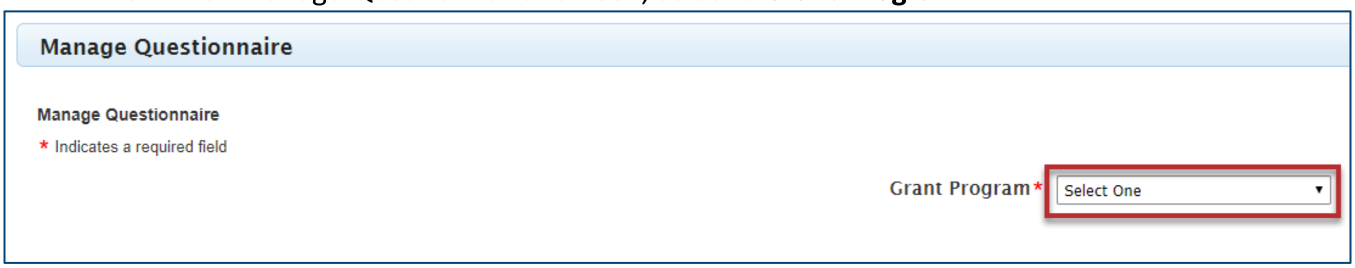

Figure 2: Manage Questionnaire screen - Grant Program

2. The screen refreshes. Click the **Create New Questionnaire** button.

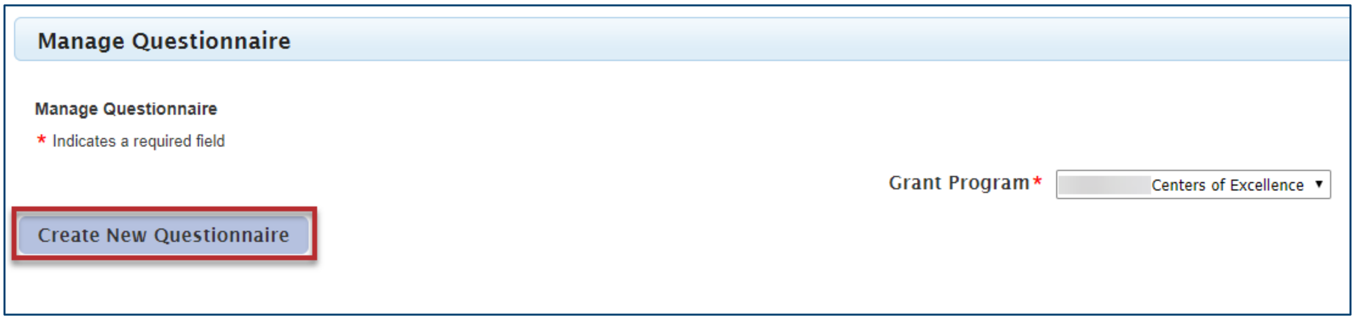

Figure 3: Manage Questionnaire screen - Create New Questionnaire button

3. The "Create Questionnaire" screen appears. In the *Questionnaire Name* field, enter a **name** for the questionnaire.

   Note: This name must be unique to the Assessment Type and selected Grant Program.

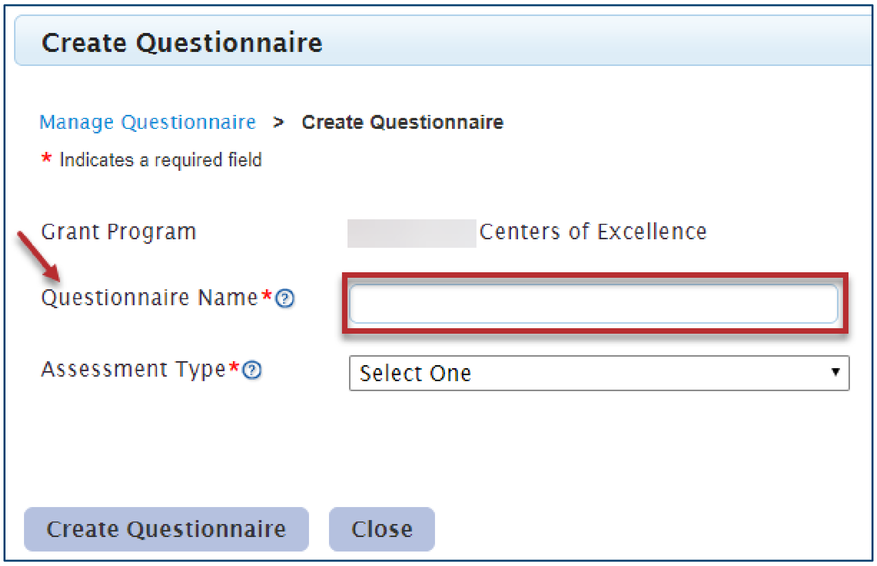

Figure 4: Create Questionnaire screen - Questionnaire Name

4. From the *Assessment Type* drop-down list, select the **Assessment Type**.

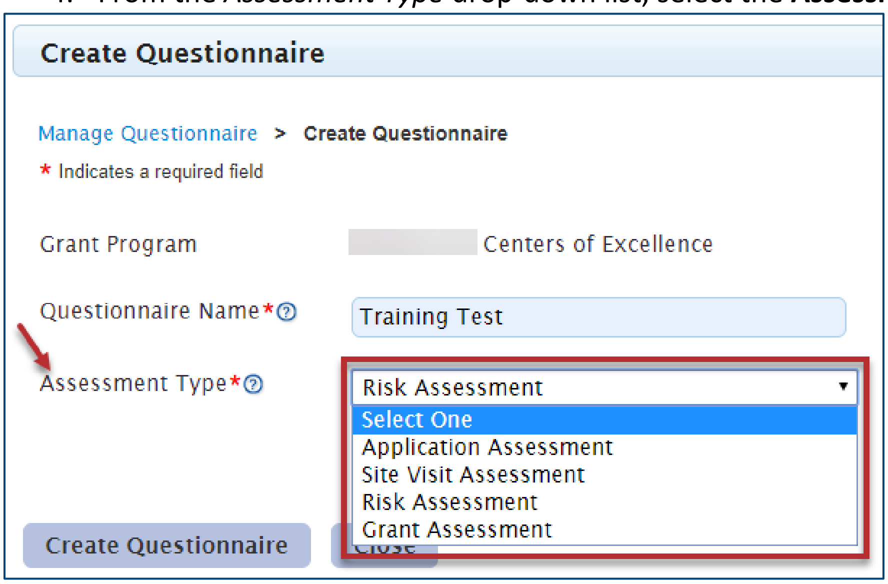

Figure 5: Create Questionnaire screen - Assessment Type

Pre-defined *Assessment Types* include:

- Application Assessment
- Site Visit Assessment
- Risk Assessment
- Grant Assessment

Note: In addition to the 4 pre-defined assessment types, a partner agency may create up to 5 custom assessment types. To add custom assessment types, please contact a Partner Services representative for assistance.

5. For Application assessments only, select an **Announcement** from the drop-down menu.

6. To create the new questionnaire, click the **Create Questionnaire** button.

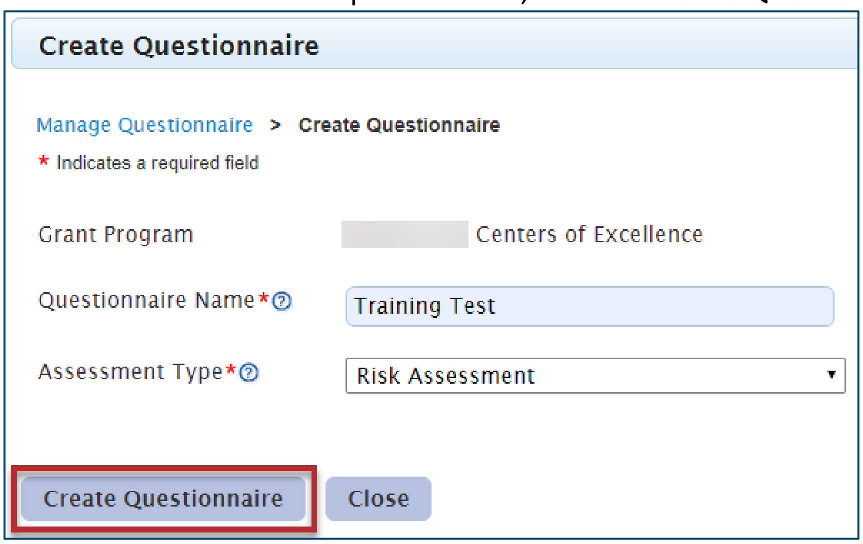

Figure 6: Create Questionnaire screen - Create Questionnaire button

7. The "Questionnaire Details" screen appears. The *Grant Program* and *Assessment Type* appear at the top of the screen. The *Questionnaire Name* prepopulates in the associated field. Click the ***Due Date*** field to select a **date** from the calendar widget.

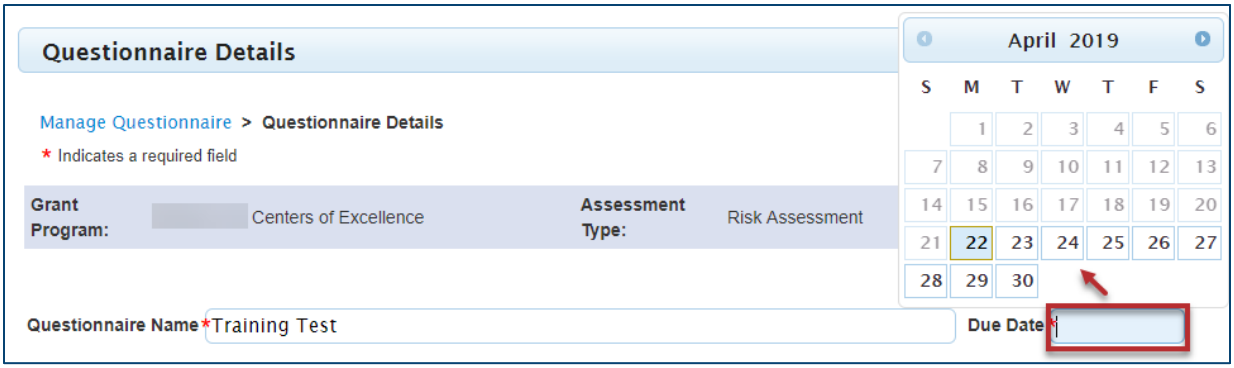

Figure 7: Questionnaire Details screen – Due Date

8. When a due date is selected, a message appears stating that there are unsaved changes.

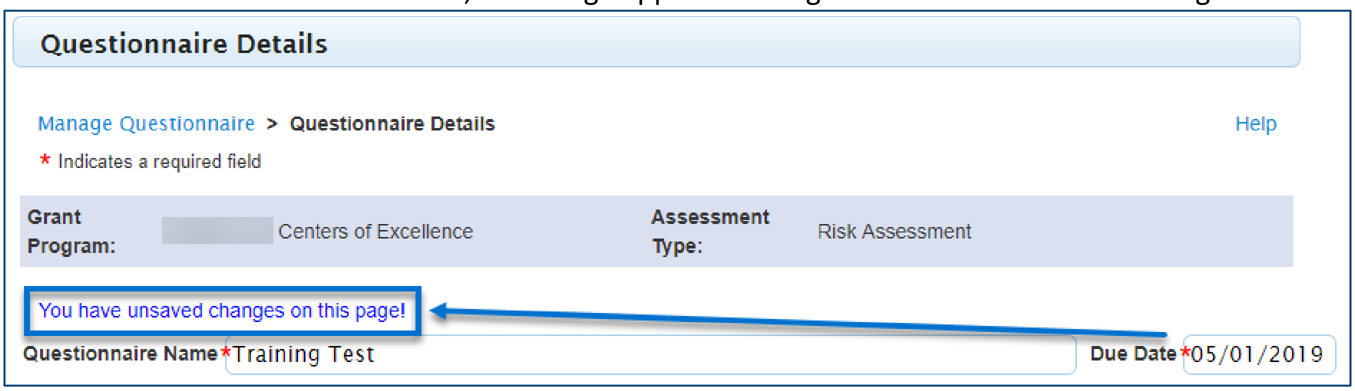

Figure 8: Questionnaire Details screen - Unsaved Changes message

9. To save the date, click the **Save** button at the bottom of the screen.

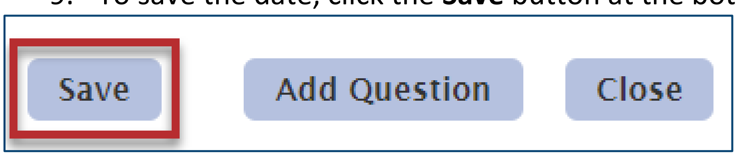

Figure 9: Questionnaire Details screen - Save button

STEP 2: ADD QUESTIONS

Once the questionnaire is created, the next step is to add the assessment questions. Questions may be designated as Program Service Office or Grants Service Office. Program Service Office questions can only be answered by Program Office staff. Likewise, Grants Service Office questions can only be answered by Grants Office staff.

To add questions:

1. At the bottom of the "Questionnaire Details" screen, click the **Add Question** button.

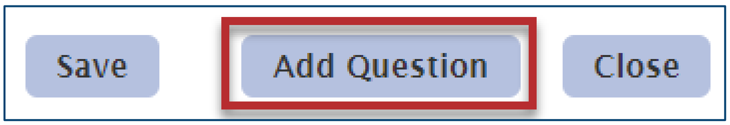

Figure 10: Questionnaire Details screen - Add Question button

2. The "Add Question" screen appears. Below the assessment information, select the **Program Service Office** or **Grants Service Office** radio button in the *Question For* field.

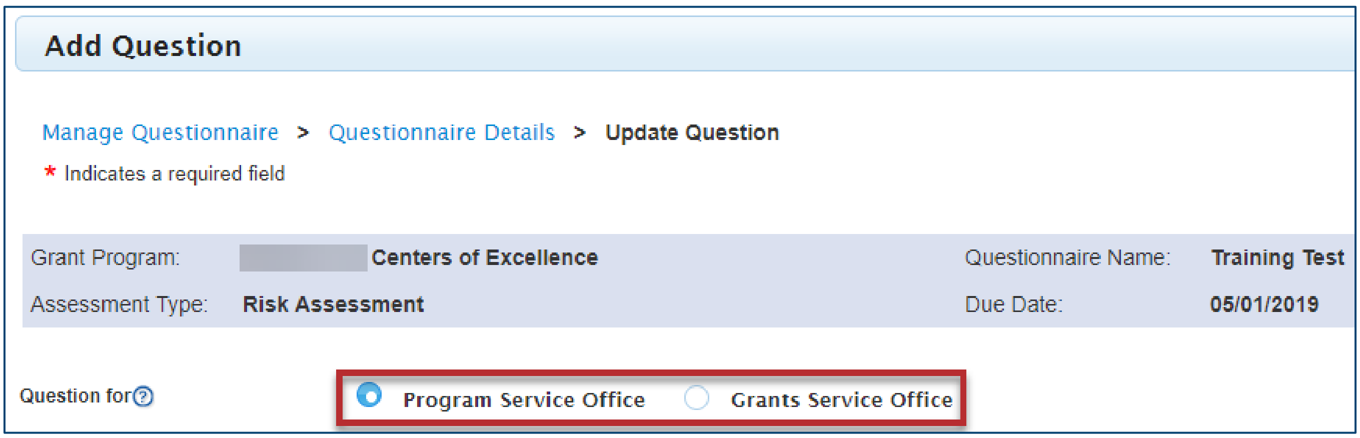

Figure 11: Add Question screen - Service Office radio buttons

3. In the required *Question Text* field, enter **text**.

   Note: There is a 500-character limit.

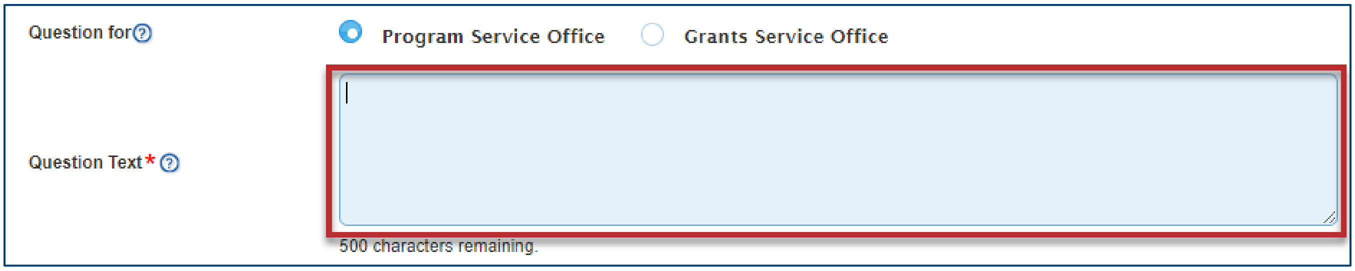

Figure 12: Add Question screen - Question Text

4. To further explain the question, add an optional description in the *Guidance* field.
   It is highly recommended that as much information as possible is entered in the *Guidance* field to ensure respondents select the best answer.

   Note: There is a 2000-character limit.

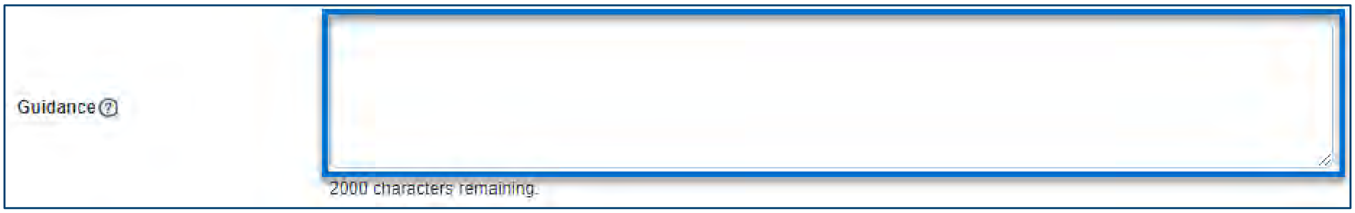

Figure 13: Add Question screen – Guidance

5. From the *Answer Type* drop-down menu, select one of the following:

   - **Plain Text**: Respondents provide paragraph answers
   - **Radio Button**: Respondents select one option from several choices
   - **Multi Select Checkbox**: Respondents select as many options as desired
   - **Date**: Respondents select a date from a calendar widget
   - **Risk**: Respondents rate the associated risk (select one option - Severe Risk, Low Risk, etc.)

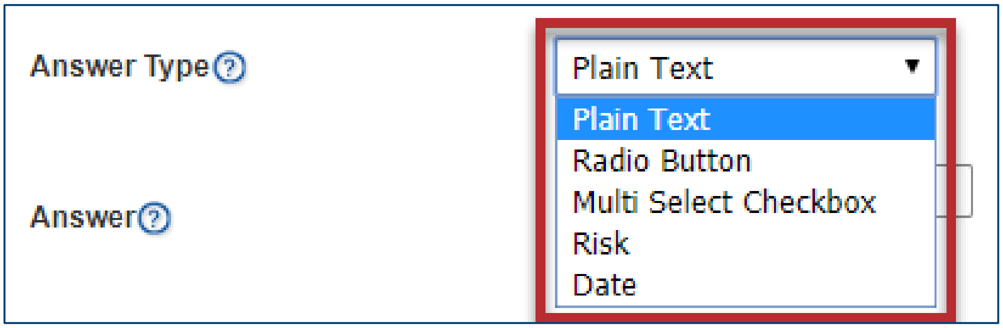

Figure 14: Add Question screen - Answer Type

Note: The default question type is *text*. Once a question is added, the type may be changed by selecting the **Edit** button from the “Questionnaire Preview” page.

Answer Type

Additional information required is based on the *Answer Type* selected. Please see below.

Plain Text:

- No additional information is needed.

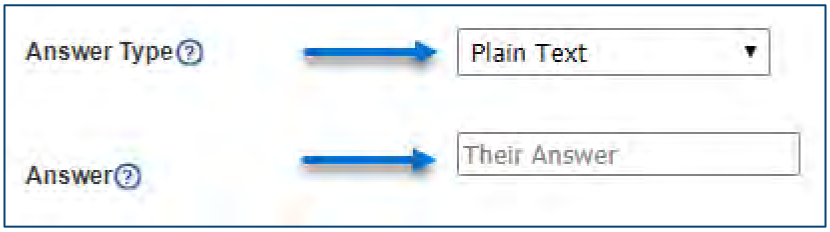

Figure 15: Add Question screen - Plain Text Answer

Radio Button:

- Select **Number of Options.** (The default value is 2 and the maximum is 5.)

- Select **Quantifiable** checkbox. (*Refer to the section titled, "Quantifiable, Rating, and Weights" for more details.)*

- Enter **Answer Options**. (This will be equal to the *Number of Options* selected.)

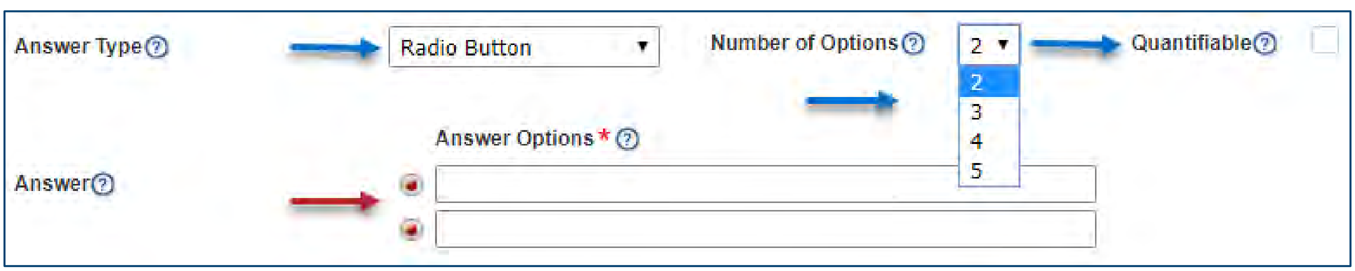

Figure 16: Add Question screen - Radio Button Answer

Multi-Select Checkbox:

- Respondents may select one or more options.
- Select **Number of Options** from the drop-down list. The maximum number of selections is 5.
- Enter **Text** for each *Answer Option*.

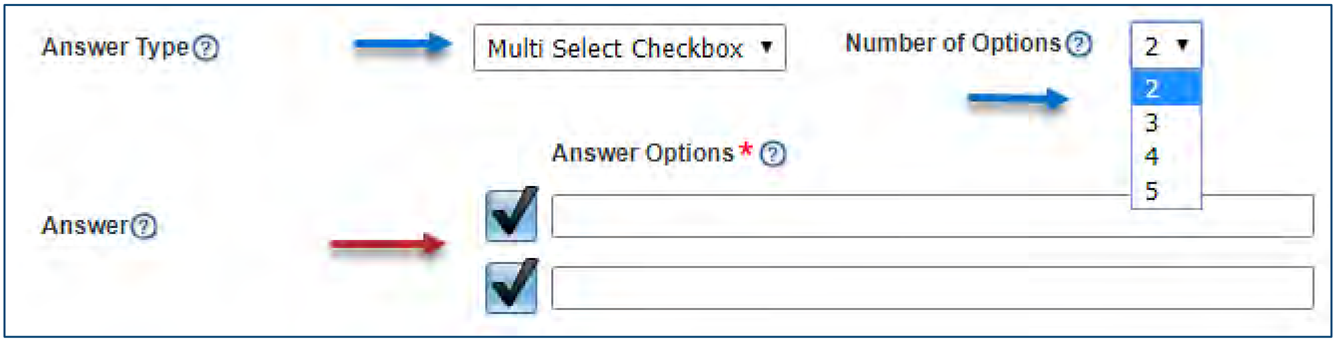

Figure 17: Add Question screen - Multi Select Checkbox Answer

Risk:

- Select the *Quantifiable** **checkbox** to associate each answer with a score.
- The *Answer Options* are pre-populated and may not be modified.
- Enter a **Weight**. The value can range from 1 to 100; however, the sum of all weights for the entire questionnaire must equal 100.

Note: Please refer to the section titled, "Quantifiable, Rating, and Weights" for additional information.

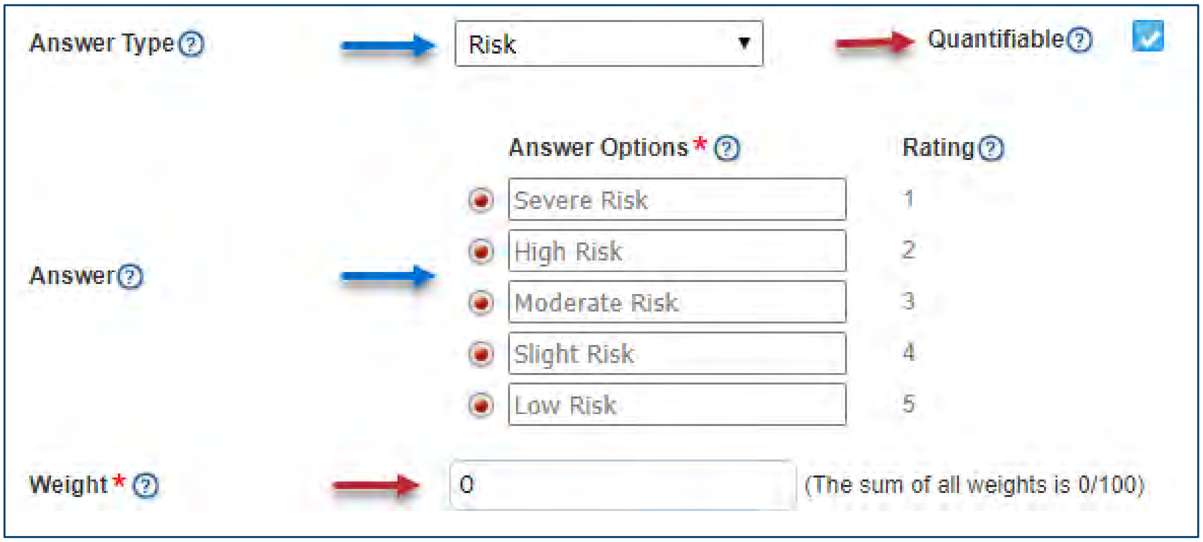

Figure 18: Add Question screen - Risk Answer

Date:

- No additional information is needed.

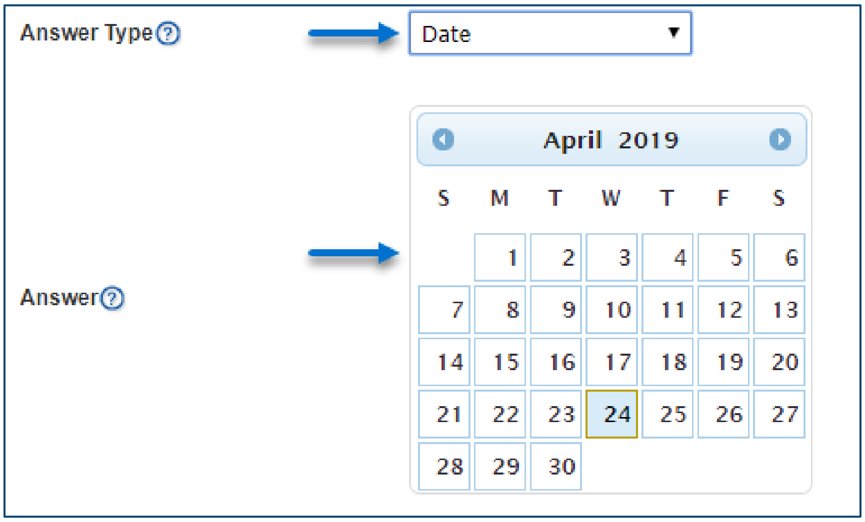

Figure 19: Add Question screen - Date Answer

Quantifiable, Rating, and Weights

Radio button and *Risk* answer types include a *Quantifiable* field, which provides the option to quantify feedback when the checkbox is selected. This allows the user to assign a weight to each question. Weights for a single question can be any value between 1 and 100; however, the sum of weights for the entire questionnaire must equal 100. The total score for a question is calculated as *Weight* * *Rating*. (*Ratings* are predefined system values associated with each answer option based on the number of options.)

To make a *Radio Button* answer quantifiable:

1. From the *Answer Type* drop-down list, select **Radio Button.**

2. From the *Number of Options* drop-down list, select a **number** from 2 to 5.

3. Select the *Quantifiable* **checkbox**.

4. Enter a **Weight**. This can be any number from 1 to 100. (The total weight of all questions must equal 100.)

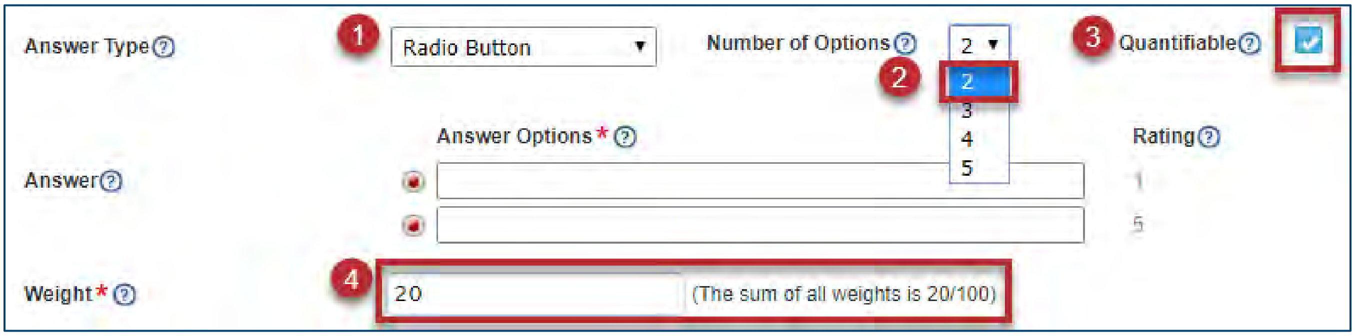

Figure 20: Add Question screen - Radio Button Weights

To make a *Risk* answer quantifiable:

1. From the *Answer Type* drop-down list, select **Risk**.

2. Select the *Quantifiable* **checkbox**.
   Note: For *Risk* questions, the number of answer options and the rating are predefined and may not be modified.

3. Enter a **Weight**. This can be any number from 1 to 100. (The total weight of all questions must equal 100.)

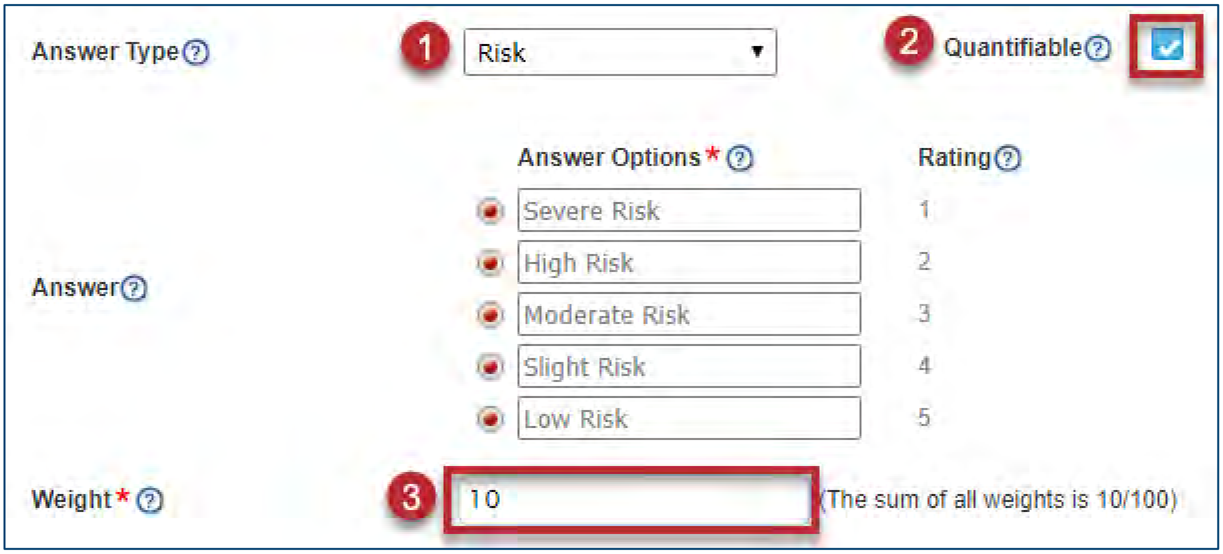

Figure 21: Add Question screen - Risk Weights

Note: The *Total Score* associated with the question is **Weight * Rating** (rating corresponding to the respondent's answer).

Additional Options

For each question, there are three additional options:

- *Required*: To prevent respondents from leaving a question blank, select the *Required* **checkbox**.

- *Allow Comments*: To allow respondents to enter comments, select the *Allow Comments* **checkbox**.

- *Allow Attachments*: To allow respondents to attach files to the questions, select the *Allow Attachments* **checkbox**.

  Note: Attachments are tied to specific questions, not the entire assessment.

Figure 22: Add Questions screen - Additional Options

When all selections have been made, click one of the following action buttons:

- **Save:** Select this option to save and validate changes and remain on the current page.

- **Save and Add Question:** Select this option to save and validate changes and create a new question.

- **Save and Copy:** Select this option to save and validate changes, as well as duplicate the current question.

- **Save and Continue:** Select this option to save and validate changes and close the current page.

- **Close:** Select this option to close the current page. Any unsaved changes will be lost.

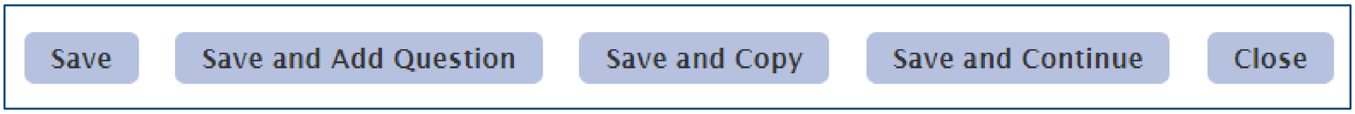

Figure 23: Add Questions screen – Save, Add, Copy, and Close buttons

Repeat the above steps for each question.

Note: The questionnaire will remain in the *Not Published* status until it has been activated. After it has been activated, the status will change to *Active*.

STEP 3: REVIEW AND EDIT THE QUESTIONS

Prior to activating the questionnaire, review the questions and make any necessary changes.

Edit a Question

To review and edit a question:

1. From the *Action* column of the "Manage Questionnaire" screen, click the **Select** drop-down button.

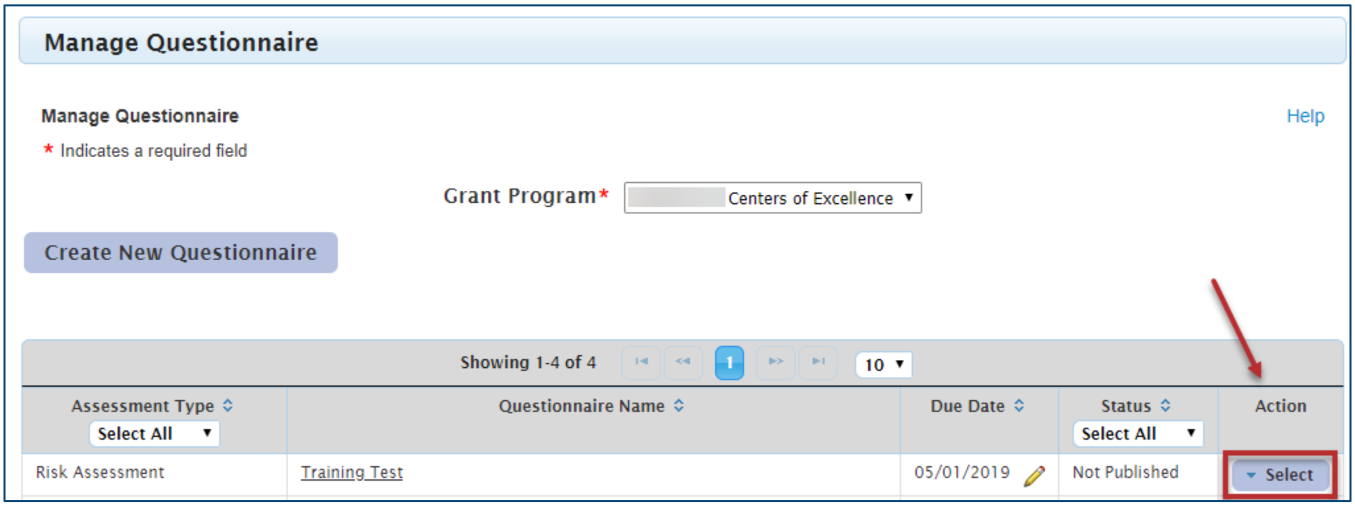

Figure 24: Manage Questionnaire screen - Select button

2. From the *Select* drop-down list, click **Edit**.

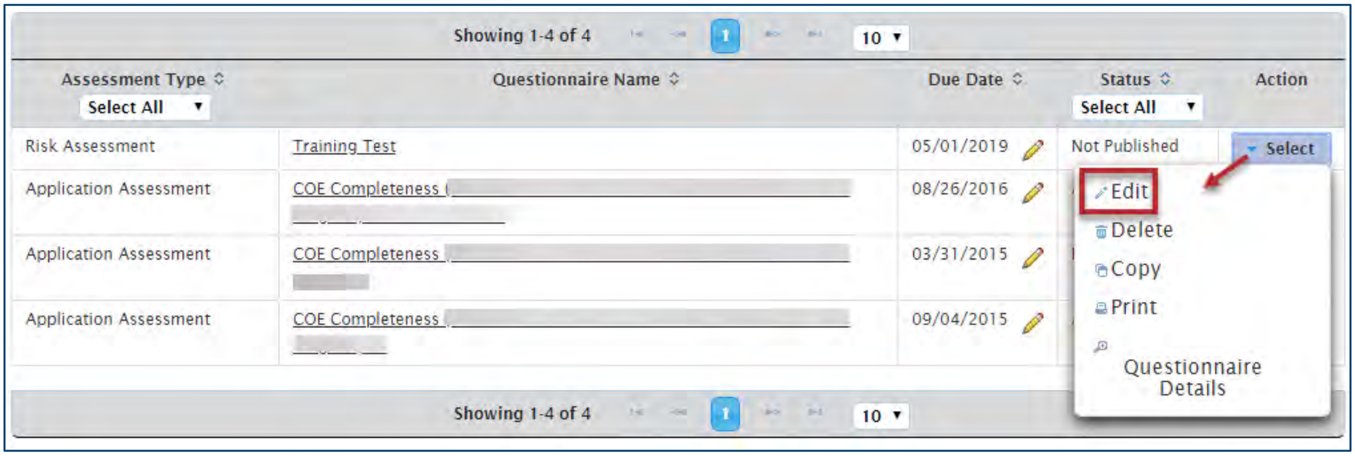

Figure 25: Manage Questionnaire screen - Edit link

3. The "Questionnaire Details" screen appears. To review or edit a question, click the corresponding **Select** drop-down button from the *Action* column.

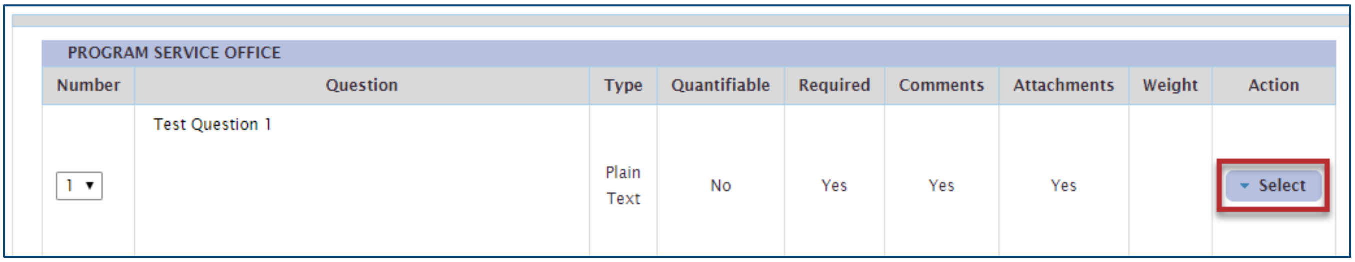

Figure 26: Questionnaire Details screen - Select button

4. When the drop-down list expands, click **Edit**.

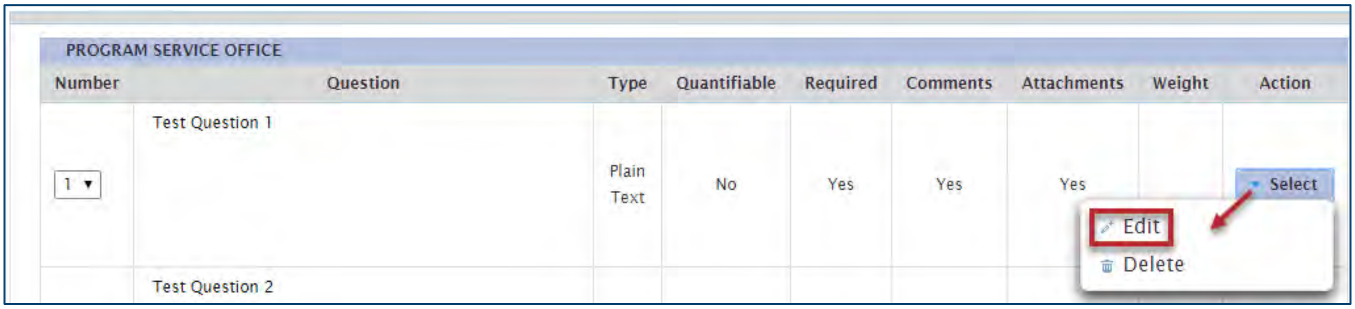

Figure 27: Questionnaire Details screen - Edit link

5. The "Update Question" screen appears. Make and save any desired changes.

Delete a Question

To delete a question:

1. From the "Questionnaire Details" screen, click the **Select** drop-down button.

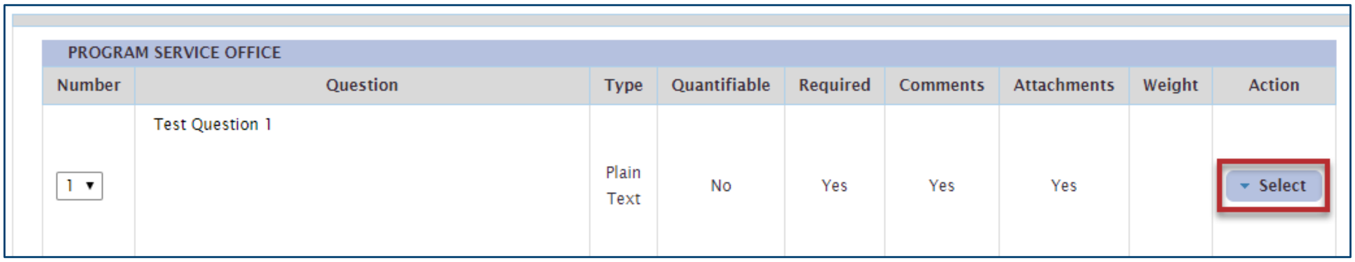

Figure 28: Questionnaire Details screen: Select button

2. When the drop-down list expands, click **Delete**.

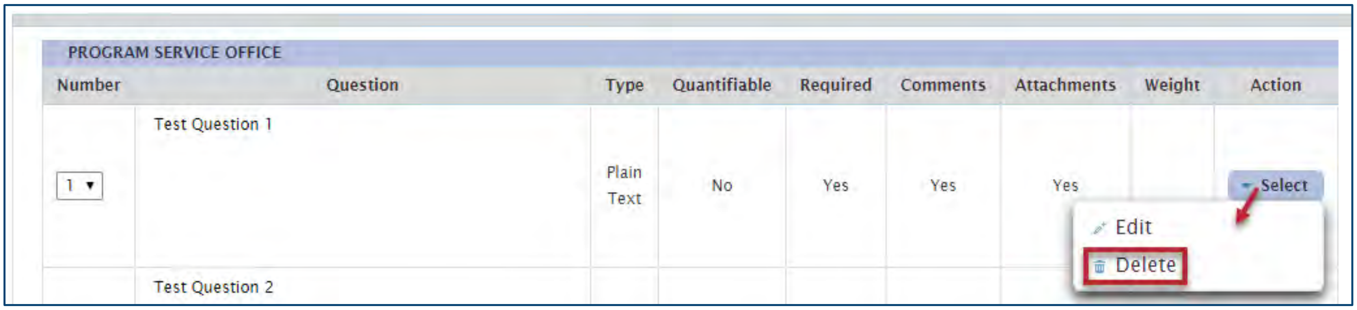

Figure 29: Questionnaire Details screen - Delete link

3. A confirmation message appears. To delete the question, click **Yes**.

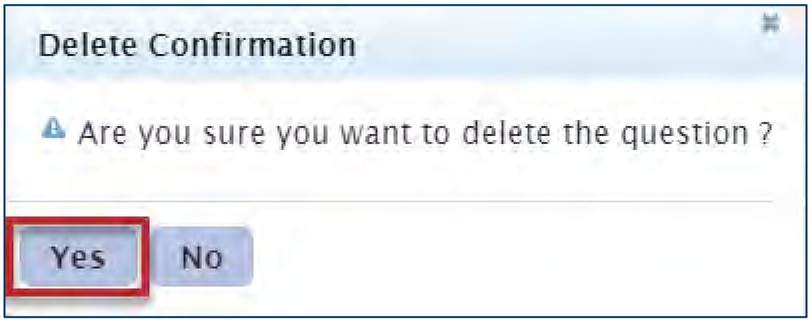

Figure 30: Questionnaire Details screen - Delete Confirmation message

Reorder Questions

To change the order of the questions:

1. From the *Number* column of the "Questionnaire Details" screen, click the **arrow** to expand the drop-down list.

Figure 31: Questionnaire Details screen - Number drop-down

2. From the drop-down list, select the **Number** which represents the order in which the selected question should appear.

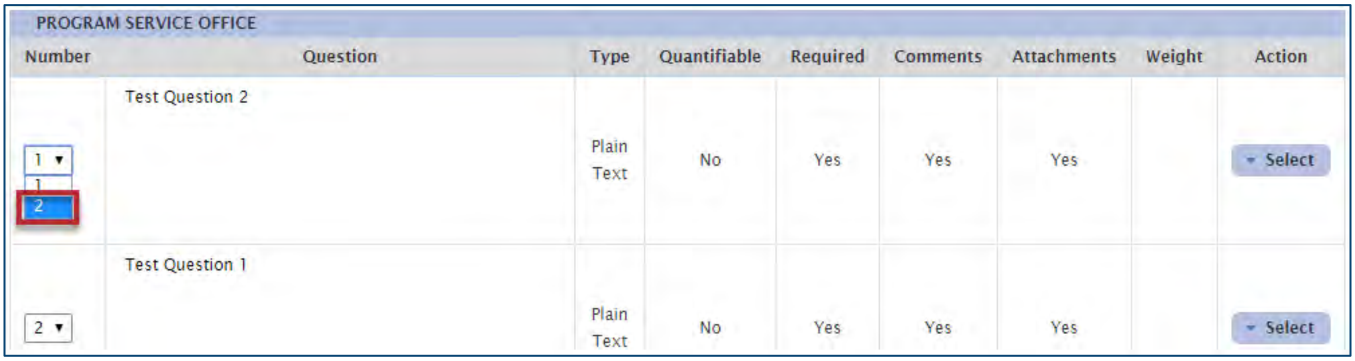

Figure 32: Questionnaire Details screen - Number drop-down

3. The screen refreshes and the questions are reordered.

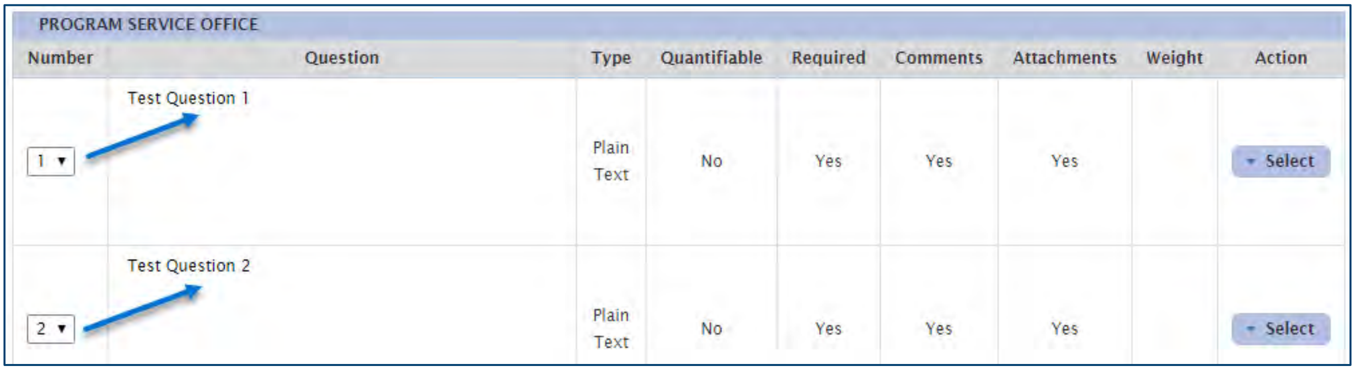

Figure 33: Questionnaire Details screen - Reordered Questions

4. To keep the change, click the **Save** button at the bottom of the screen.

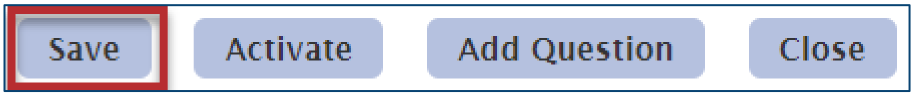

Figure 34: Questionnaire Details screen - Save button

STEP 4: ACTIVATE THE QUESTIONNAIRE

The final step in the process is to activate the questionnaire. Activating a questionnaire makes it active for all grants under the selected Grant Program. For Application Assessments, the questionnaire is active for all applications that belong to an announcement.

Activate the Questionnaire

To activate a questionnaire:

1. From the *Action* column of the "Manage Questionnaire" screen, click the **Select** drop-down button.

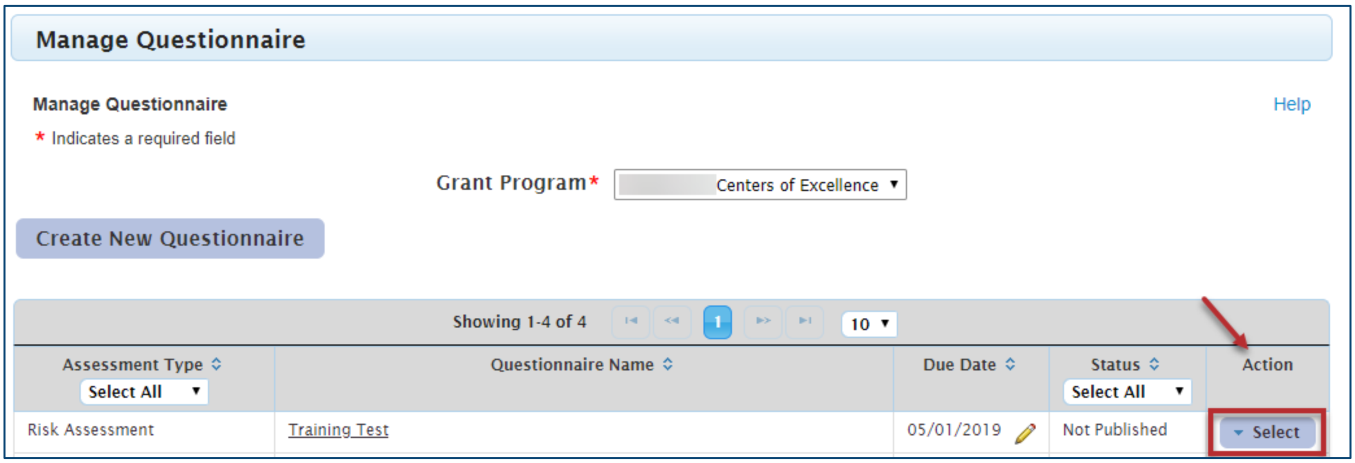

Figure 35: Manage Questionnaire screen - Select drop-down button

2. When the list expands, click **Activate**.

Figure 36: Manage Questionnaire screen - Activate link

3. A confirmation message appears. To activate the questionnaire, click **Yes**.

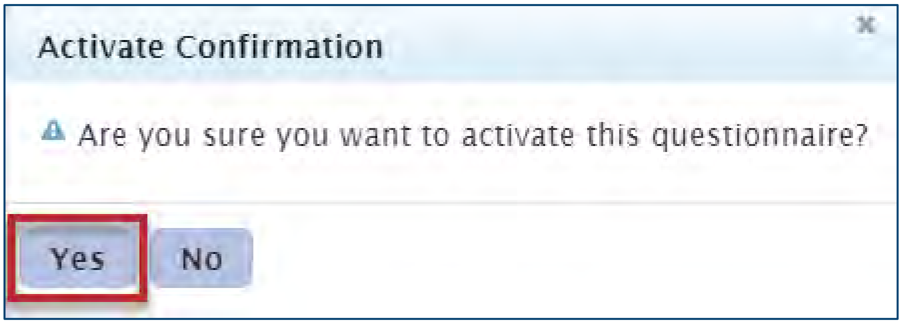

Figure 37: Manage Questionnaire screen - Activate Confirmation message

4. The questionnaire *Status* updates to *Active.*

Figure 38: Manage Questionnaire screen - Active status

Note: When *Active*, the questionnaire may be completed by respondents. Once a questionnaire is activated and one or more assessments are in progress or completed, the questionnaire cannot be edited or deleted. To make changes, copy the questionnaire and activate the new one.

Figure 39: Manage Questionnaire screen - Copy link

Deactivate the Questionnaire

To deactivate a questionnaire:

1. From the *Action* column of the "Manage Questionnaire" screen, click the **Select** drop-down button.

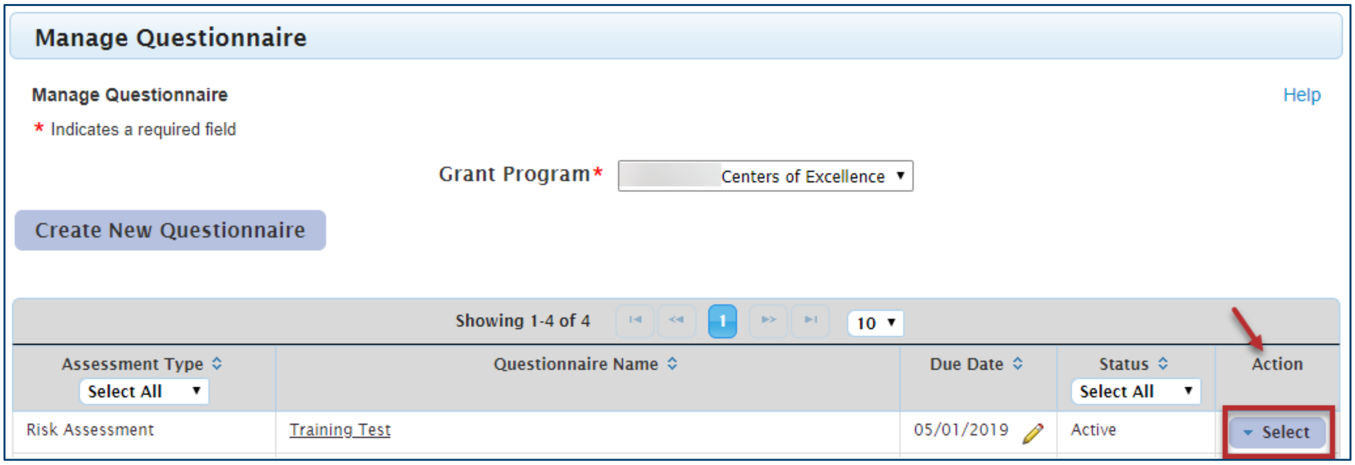

Figure 40: Manage Questionnaire screen - Select drop-down button

2. When the list expands, click **Deactivate**.

Figure 41: Manage Questionnaire screen - Deactivate link

3. A confirmation message appears. To deactivate the questionnaire, click **Yes**.

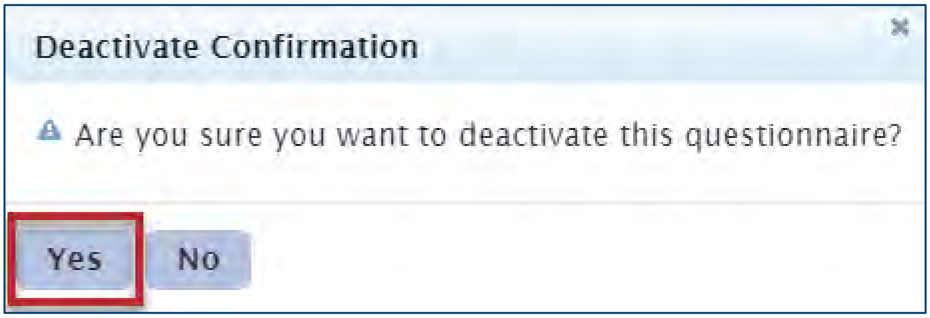

Figure 42: Manage Questionnaire screen - Deactivate Confirmation Message

Deactivating a questionnaire ensures:

- A completed assessment for this questionnaire cannot be resubmitted
- Any assessment that has not yet begun for this questionnaire cannot be started
- In-Progress assessments for this questionnaire are still available for completion

Delete the Questionnaire

A questionnaire may only be deleted if the status is *Not Published*, or if no assessments are in-progress or completed.

Important! Once a questionnaire is deleted, it cannot be retrieved.

To delete a questionnaire:

1. From the *Action* column of the "Manage Questionnaire" screen, click the **Select** drop-down button.

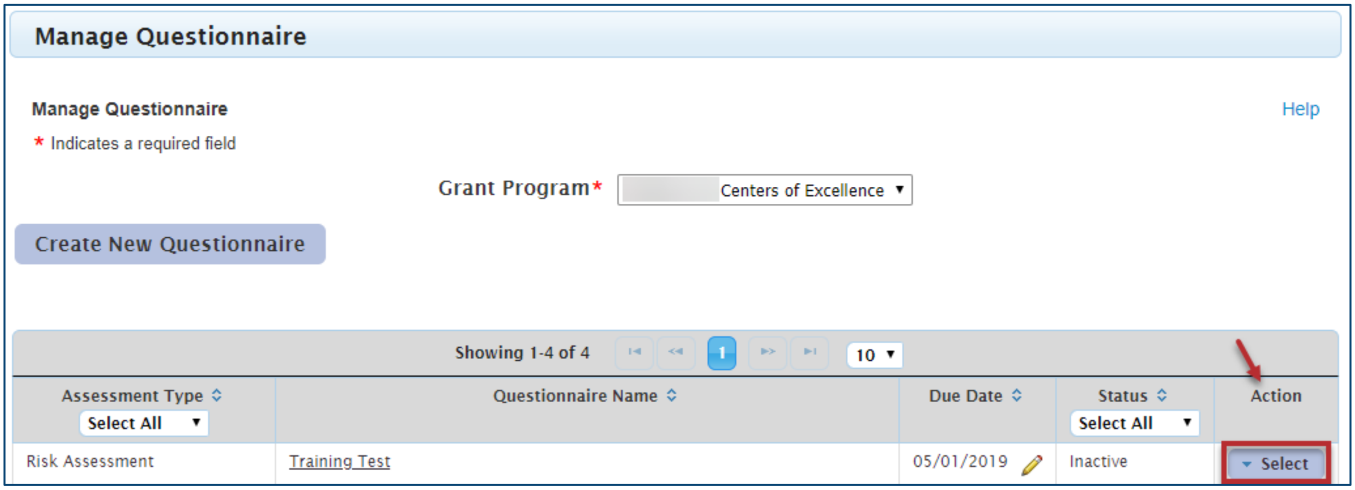

Figure 43: Manage Questionnaire screen - Select drop-down button

2. When the list expands, click **Delete**.

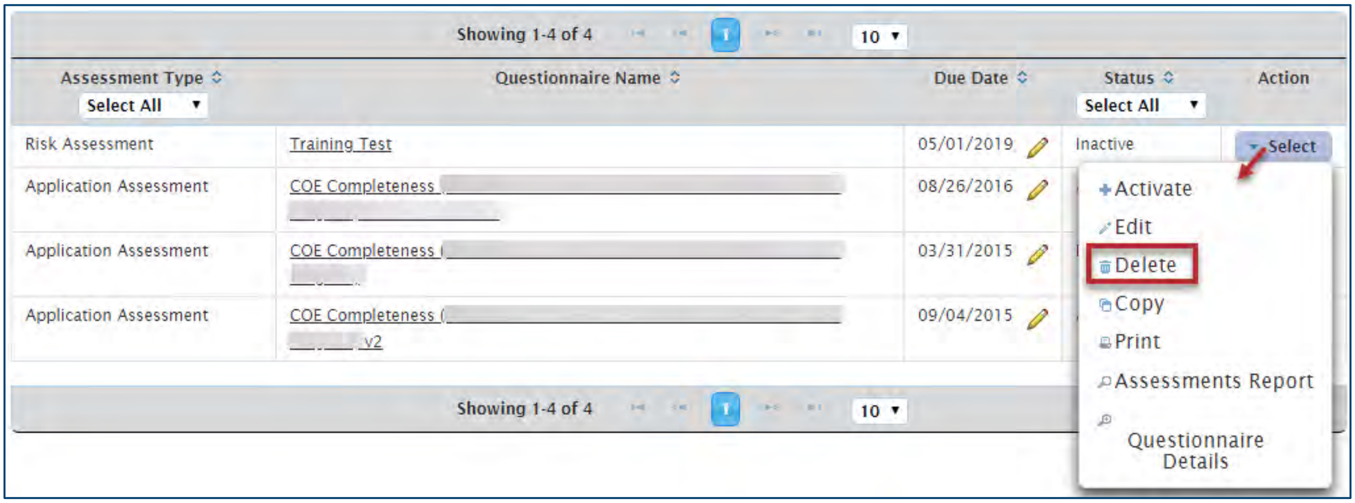

Figure 44: Manage Questionnaire screen - Delete link

3. A confirmation message appears. To delete the assessment, click **Yes**.

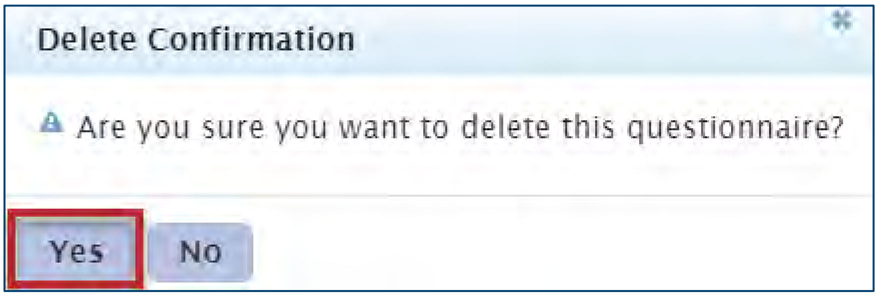

Figure 45: Manage Questionnaire screen - Delete Confirmation Message

STEP 5: ANSWER A QUESTIONNAIRE

When a questionnaire is activated for a grant or application, responses may be entered. Application questionnaires can be accessed from the "Application Receipt and Logging" screen in the GrantSolutions Grants Management Module (GMM). Grant questionnaires can be accessed from the GMM "Grants List" screen.

Complete a Grant Questionnaire

To complete a Grant questionnaire:

1. From the GMM "Grants List" screen, enter **criteria** in at least one *Simple* or *Advanced* search field. Click the **Search** icon (magnifying glass).

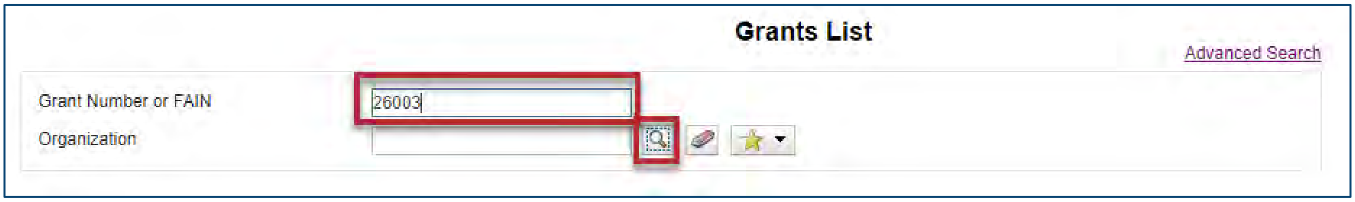

Figure 46: Grants List screen - Simple Search

2. Matching results display in a table below the search fields. Locate the desired grant and click the blue **plus sign** in the second column.

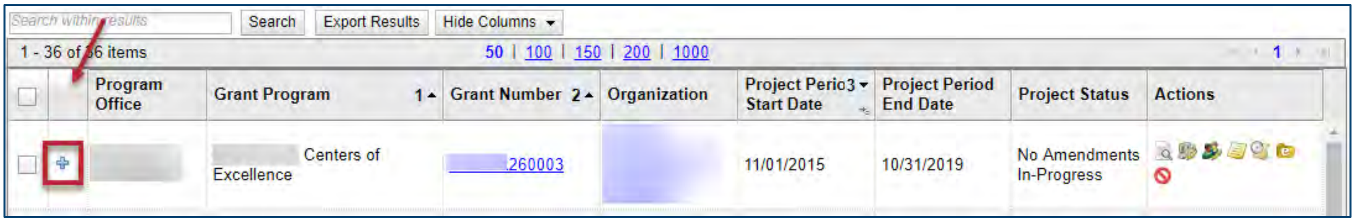

Figure 47: Grants List screen - Expand Search Results

3. The row expands. From the *Actions* column on the right, click the **Grant Project Assessment** link.

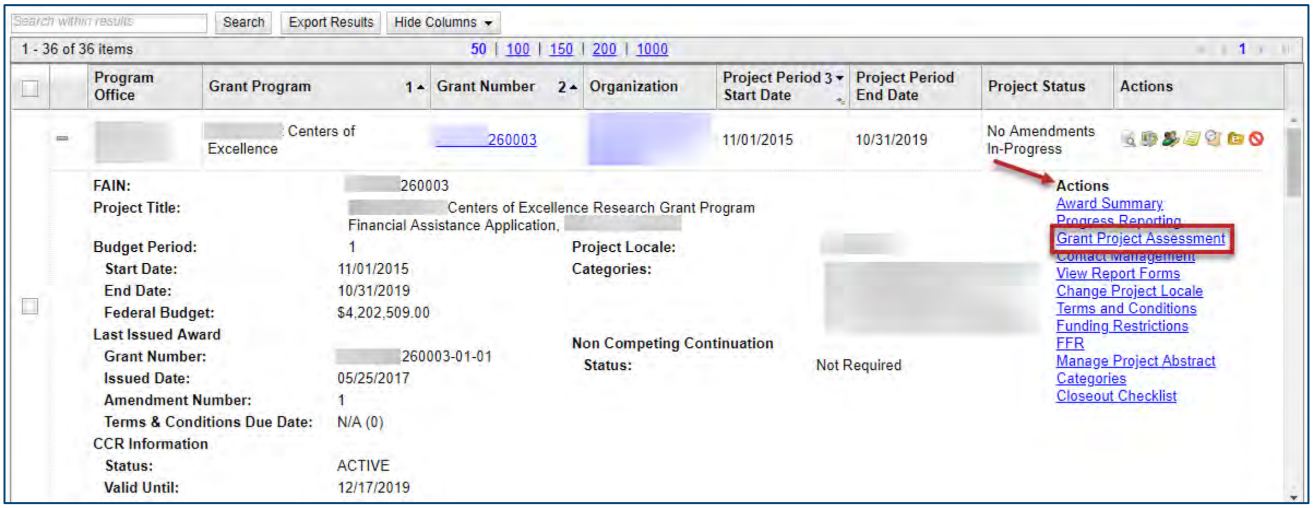

Figure 48: Grants List screen - Grant Project Assessment link

4. The "Manage Assessments" screen appears. From the *Action* column of the *In Progress/Not Started Assessments* section, click the **Select** drop-down button.

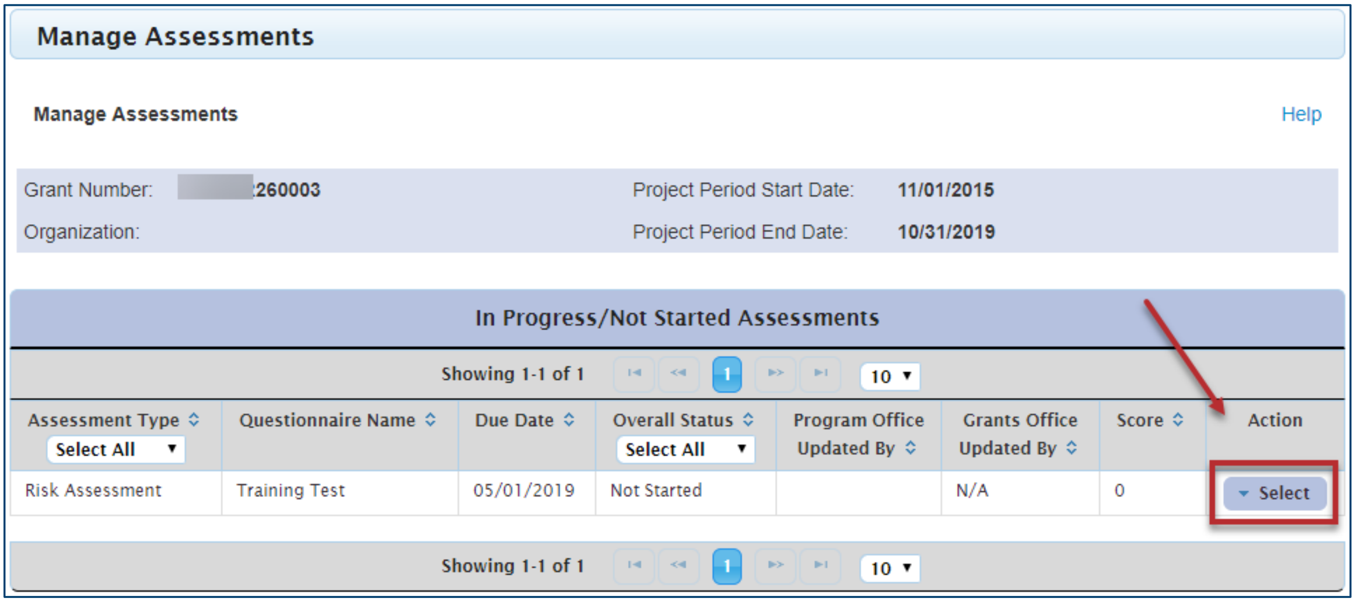

Figure 49: Manage Assessments screen - Select button

5. When the drop-down list expands, click **Start**.

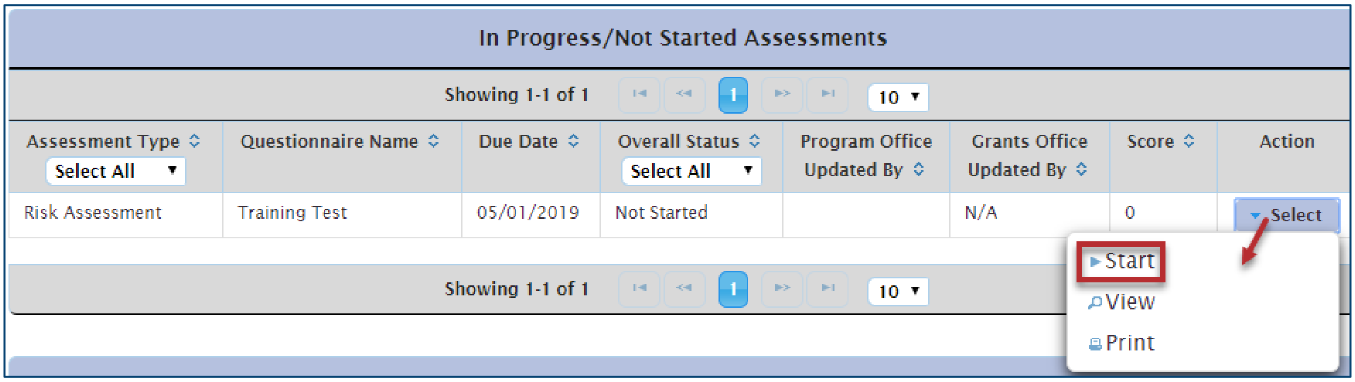

Figure 50: Manage Assessments screen – Start link

6. The "Perform Assessment" screen appears. When completing the assessment, consider the following:
   - Questions with a red asterisk are required
   - The *Score*, *Weight*, and *Overall Score* fields are visible
   - For *Text* answers, type directly into the provided text box. There is a 4,000-character limit.
   - For *Radio Button* answers, select one radio button
   - For *Multi Select Checkbox* answers, click the appropriate checkbox(es) to select one or more options
   - For Date answers, click inside the dialog box and select the correct **month**, **day**, and **year** from the Calendar widget
   - If available, comments may be entered by typing directly in the *Comments* textbox. There is a 2,000-character limit.
   - If available, files may be attached to a question
     - In the *Description* field, enter a **description** of the attachment
     - Click the **Choose** button to locate the desired file

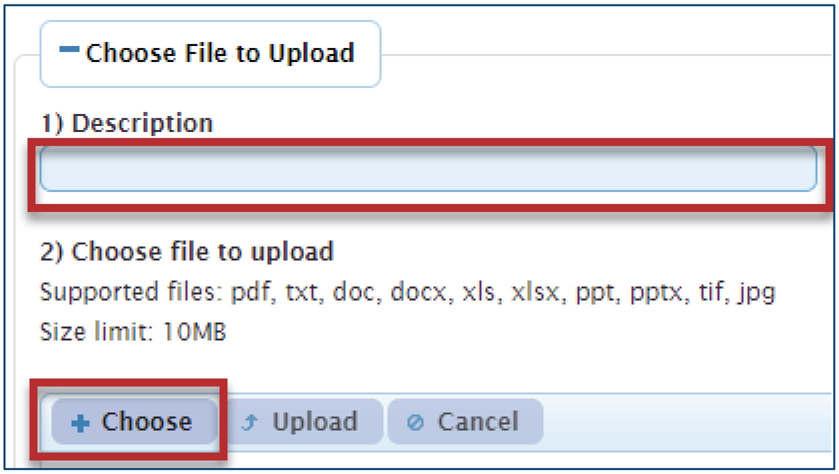

Figure 51: Perform Assessment screen - Choose File to Upload section

- Select the file and click the **Open** button.

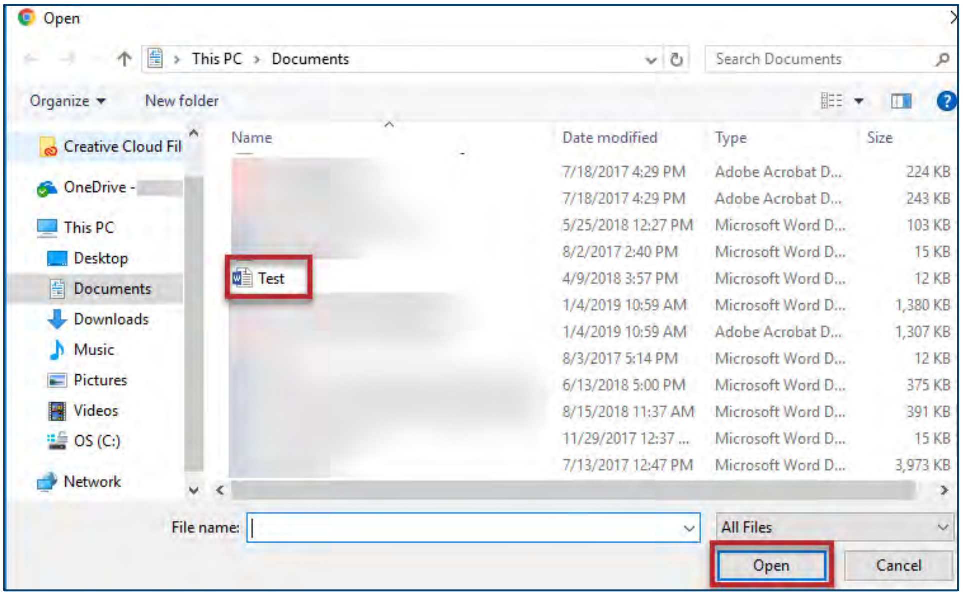

Figure 52: File Selection

- To attach the file, click the **Upload** button.

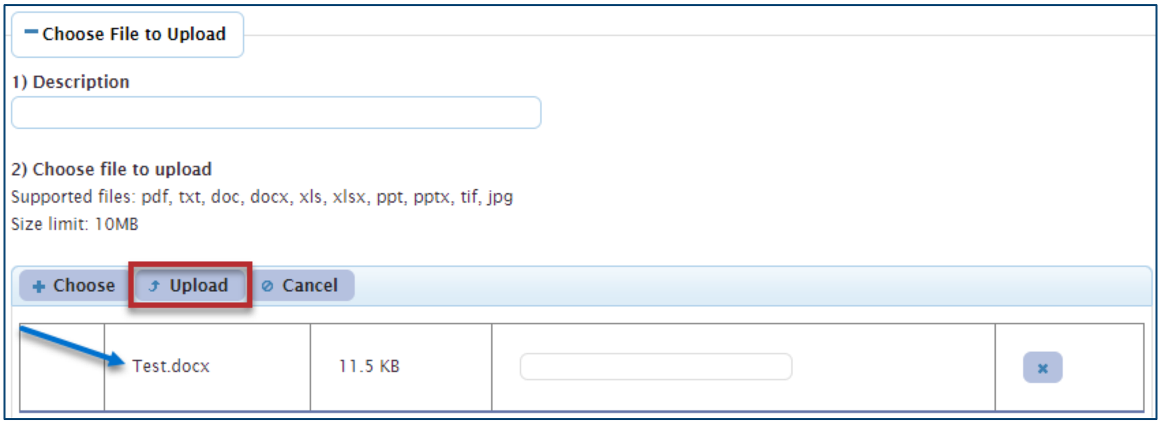

Figure 53: Perform Assessment screen - Upload button

7. For assistance with answering a question, select the corresponding **Guidance** link to view additional instructions (if available).

8. To save responses, click the **Save** button.

Figure 54: Perform Assessment screen - Save button

9. When all questions are completed, and the questionnaire is ready for submission, click the **Submit** button.

Figure 55: Perform Assessment screen - Submit button

Note: Once the questionnaire is submitted, the assessment is considered *Complete*. It will appear in the *Completed Assessments* section of the "Manage Assessments" screen. To edit assessment answers after submission, click the **Resubmit** button from the *Action* column's *Select* drop-down list.

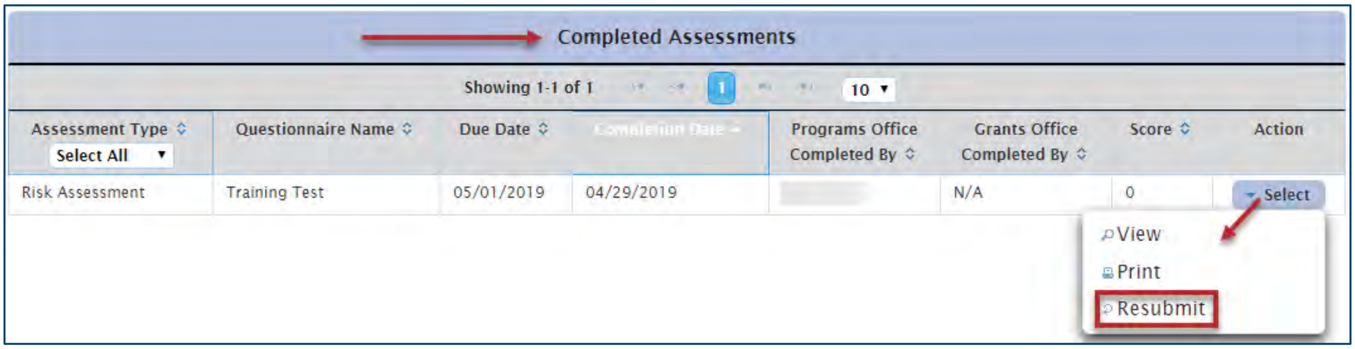

Figure 56: Manage Assessments screen - Resubmit link

Printing

To print the completed questionnaire or assessment, including all attachments, perform the following steps:

1. From the *Action* column of the *Completed Assessments* section on the "Manage Assessments" screen, click the **Select** drop-down button.

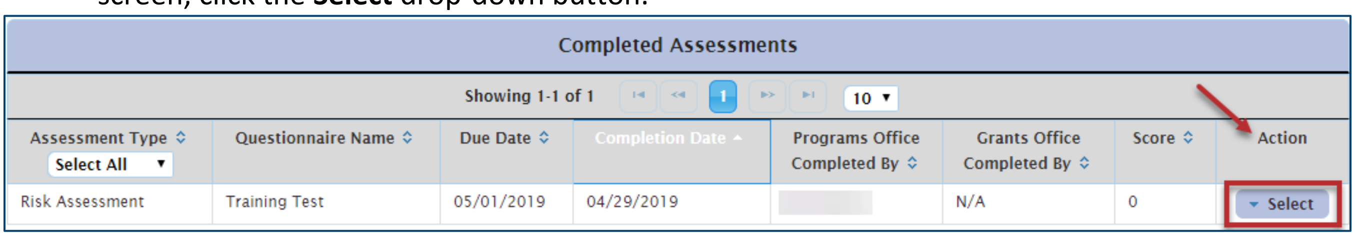

Figure 57: Manage Assessments screen - Select drop-down button

2. When the list expands, click **Print**.

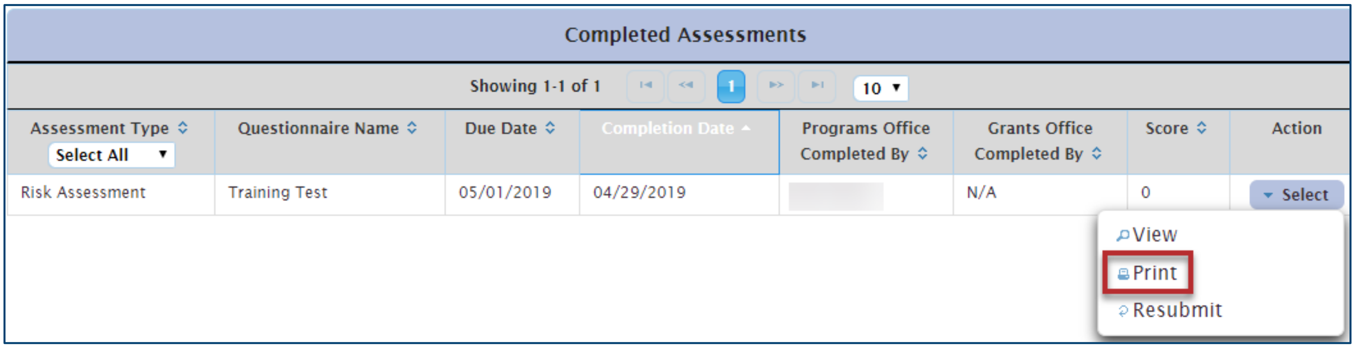

Figure 58: Manage Assessments screen - Print link

3. A PDF file containing the questionnaire and attachments opens in a new window. Click the **Printer** icon in the upper right corner.

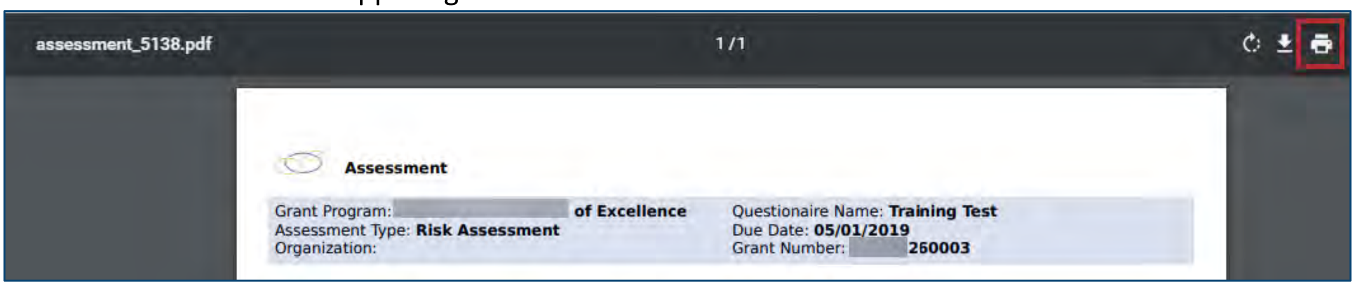

Figure 59: Assessment – PDF

Complete an Application Questionnaire

To complete an Application Questionnaire:

1. From the GMM menu bar, select **Applications ➔ Application Receipt Log**.

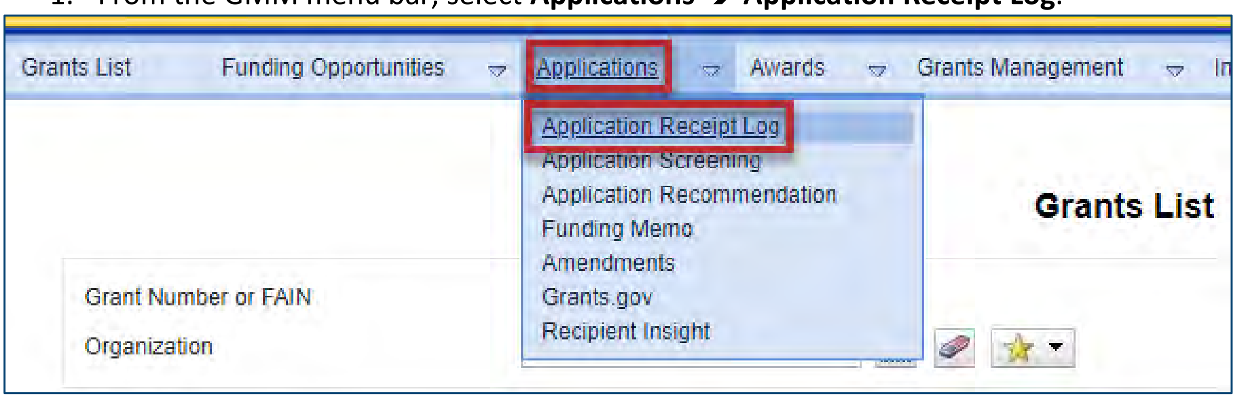

Figure 60: GMM Menu bar - Applications > Application Receipt Log

2. The "Application Receipt and Logging" screen appears. Enter **search criteria** in at least one *Simple* or *Advanced* search field. Click the **Search** icon (magnifying glass).

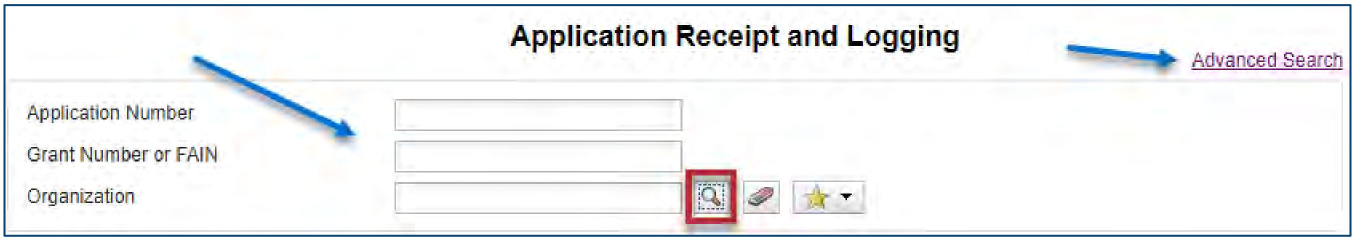

Figure 61: Application Receipt and Logging screen - Search icon

3. Matching results appear in a table below the search fields. Locate the desired application and click the corresponding blue **plus sign (+)**.

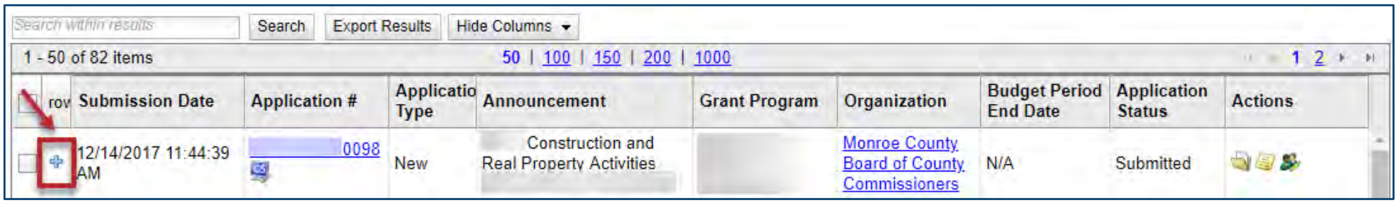

Figure 62: Application Receipt and Logging screen – Expand Search Results

4. The application row expands. On the right side of the screen, click the **Application Assessment** link.

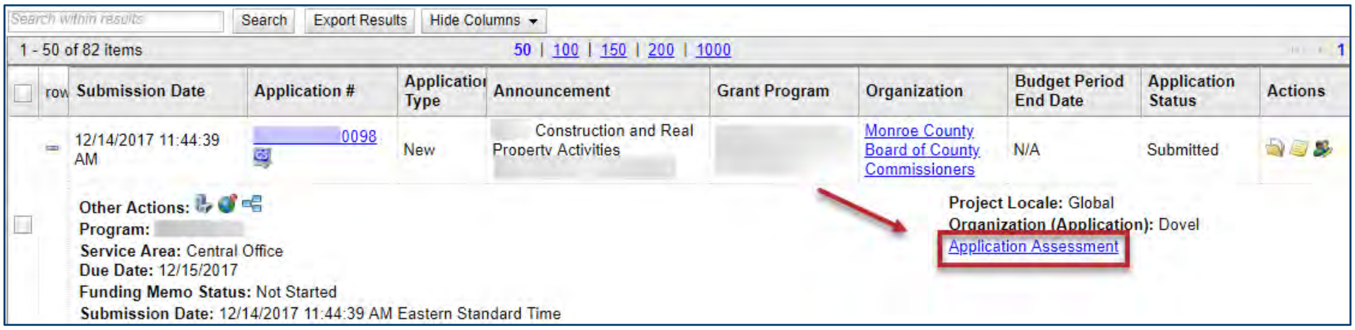

Figure 63: Application Receipt and Logging screen - Application Assessment link

5. The "Manage Assessments" screen appears. Follow steps 4-9 in the previous section titled, "Complete a Grant Questionnaire."

Lesson 3: Sorting, Filtering, Reporting, and More

The "Manage Questionnaire" screen provides a list of all questionnaires created for each Grant Program. In addition to viewing questionnaires, users can sort the list of questionnaires by any of the column titles available in the table.

Two reports are available to provide additional information and details about the questionnaires and completed assessments. The Questionnaire Details report provides a summary of the questionnaire including the status, due date, and number of assessments in progress. The Assessments report provides a list of all assessments, as well as the ability to view completed assessments individually.

Additional instructions for accessing these reports are provided below.

OBJECTIVES

At the end of this lesson, the user will be able to:

- Sort and filter questionnaires by *Assessment Type* or *Status*
- View questionnaire details
- View, sort, and filter Assessment reports
- Print questionnaires and assessments with attachments

VIEW, SORT, AND FILTER QUESTIONNAIRES AND ASSESSMENTS

Sorting allows the user to change the order in which questionnaires and assessments appear in a list. For example, it may be useful to organize the list alphabetically by *Questionnaire Name*, or in ascending/descending order by *Due Date*. In the Project Assessment tool, all columns on the "Manage Questionnaire" screen are sortable.

Filtering allows the user to view and work with a subset of data in the list. Questionnaires may be filtered by *Assessment Type* or *Status*. Assessments may be filtered by *Assessment Status*.

Questionnaires

To sort the list of questionnaires:

1. From the GMM Menu bar, select **Grants Management ➔ Project Assessment**.

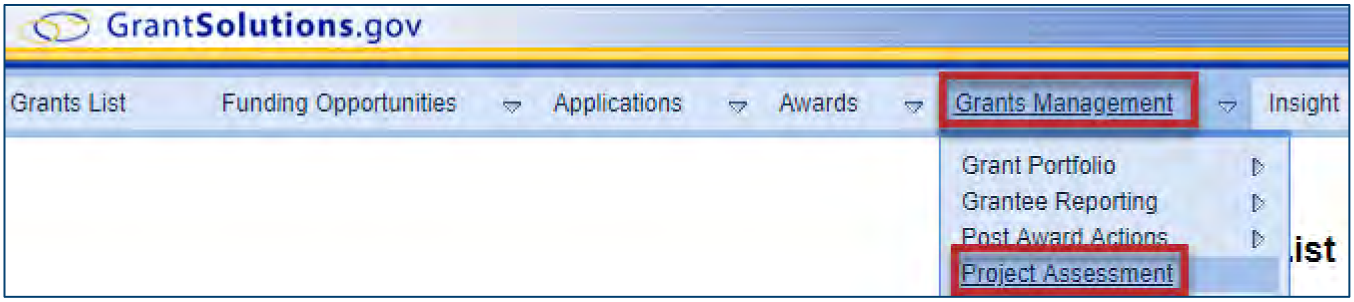

Figure 64: GMM Menu bar - Grants Management > Project Assessment

2. The "Manage Questionnaire" screen appears. Select a **Grant Program** from the drop-down list.

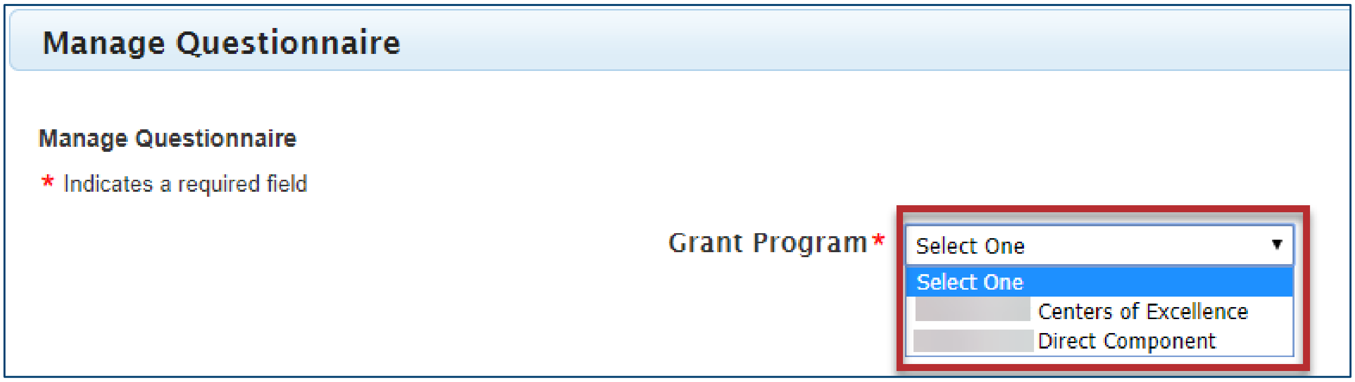

Figure 65: Manage Questionnaire screen - Select Grant Program

3. A list of questionnaires for the selected Grant Program appears. To sort in ascending or descending order, click the Up or Down **arrows** to the right of a column header.

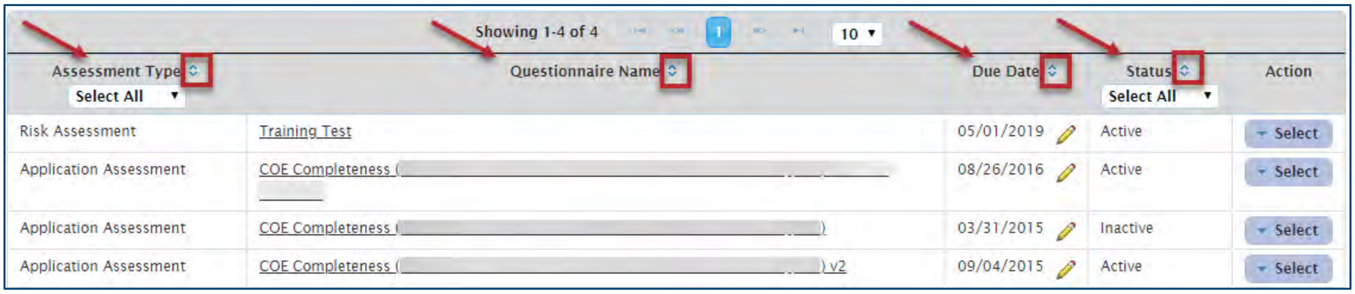

Figure 66: Manage Questionnaire screen - Sort by Column

To filter the list of Questionnaires:

1. From the *Assessment Type* drop-down list on the "Manage Questionnaire" screen, select a value.

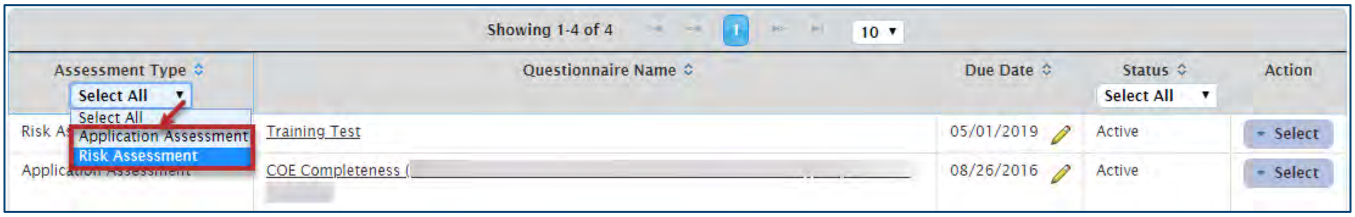

Figure 67: Manage Questionnaire screen - Filter by Assessment Type

2. The table will update to only display assessments matching the selected *Assessment Type*.

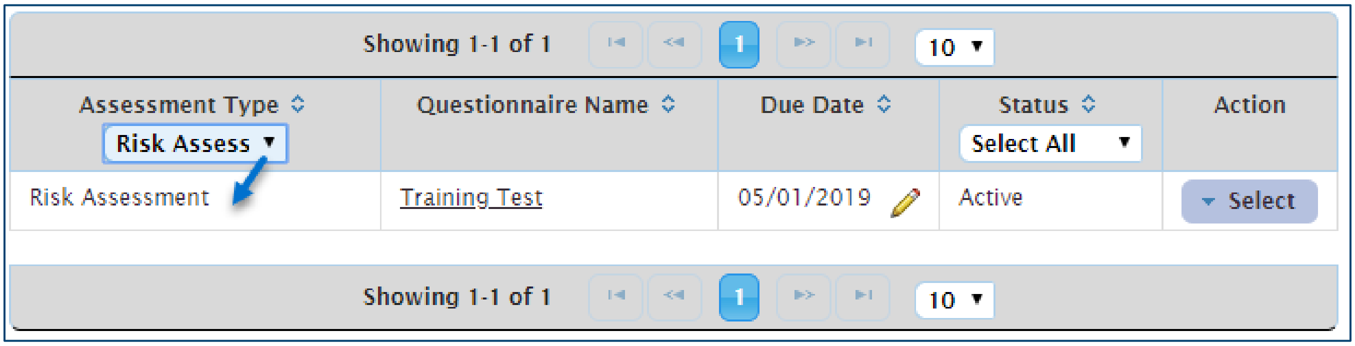

Figure 68: Manage Questionnaire screen - Filter by Assessment Type

3. Alternatively, assessments may be filtered by *Status*. From the *Status* column on the "Manage Questionnaire" screen, click the drop-down **arrow**.

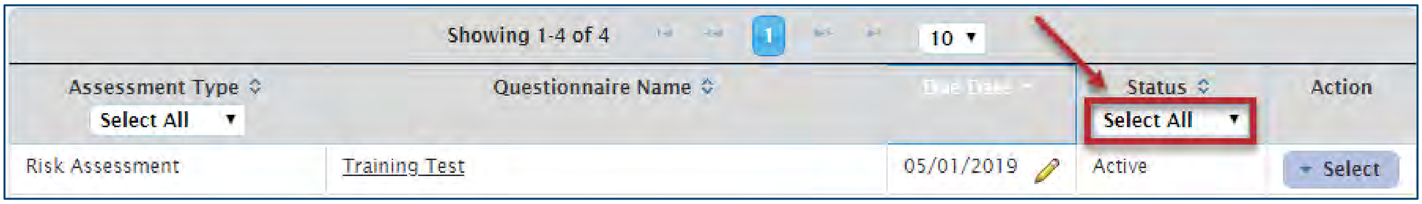

Figure 69: Manage Questionnaire screen - Filter by Status

4. The drop-down list displays. Select the desired **status**.

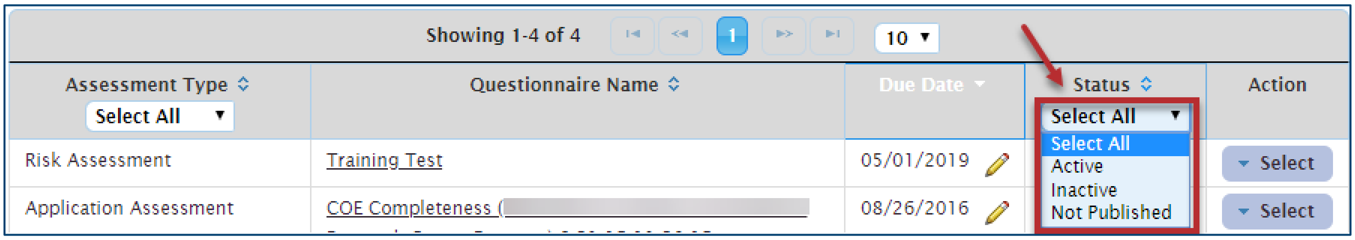

Figure 70:Manage Questionnaire screen - Filter by Status

Note: To remove a filter, click the drop-down **arrow** and choose **Select All**.

Questionnaire Details Report

To view details for a questionnaire:

1. From the *Action* column on the "Manage Questionnaire" screen, click the **Select** drop-down button.

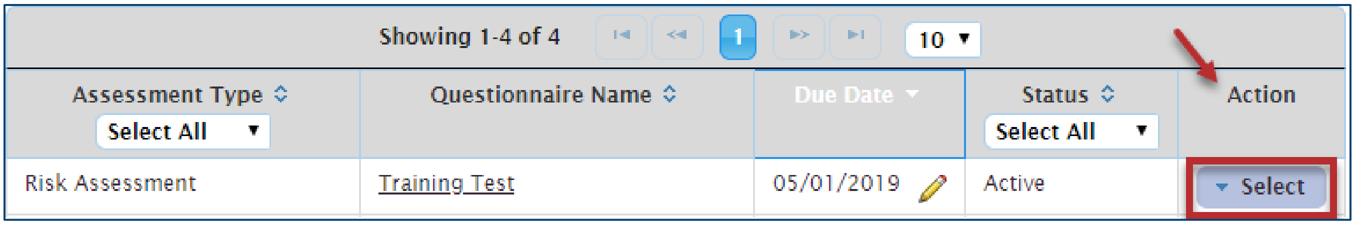

Figure 71: Manage Questionnaire screen - Select button

2. When the drop-down expands, click **Questionnaire Details**.

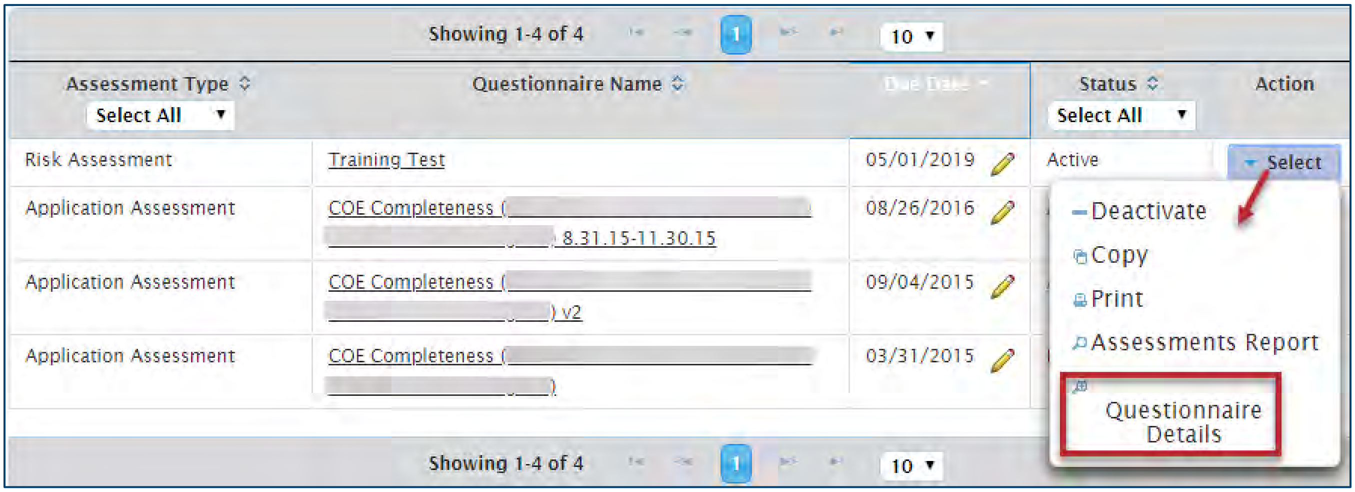

Figure 72: Manage Questionnaire screen - Questionnaire Details link

3. The "Questionnaire Details" screen opens in a new window.

Figure 73: Questionnaire Details screen

Assessments Report

To view assessments completed for a questionnaire:

1. From the GMM Menu bar, select **Grants Management ➔ Project Assessment**.

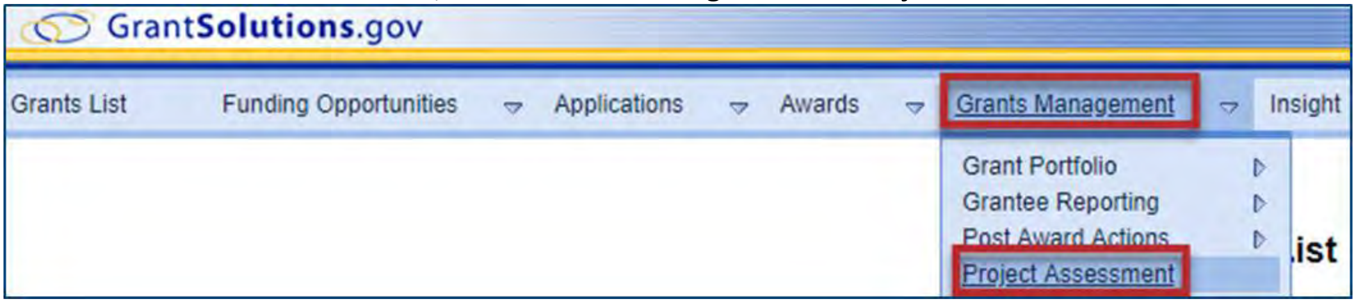

Figure 74: GMM Menu bar - Grants Management > Project Assessment

2. The "Manage Questionnaire" screen appears. From the drop-down list, select a **Grant Program**.

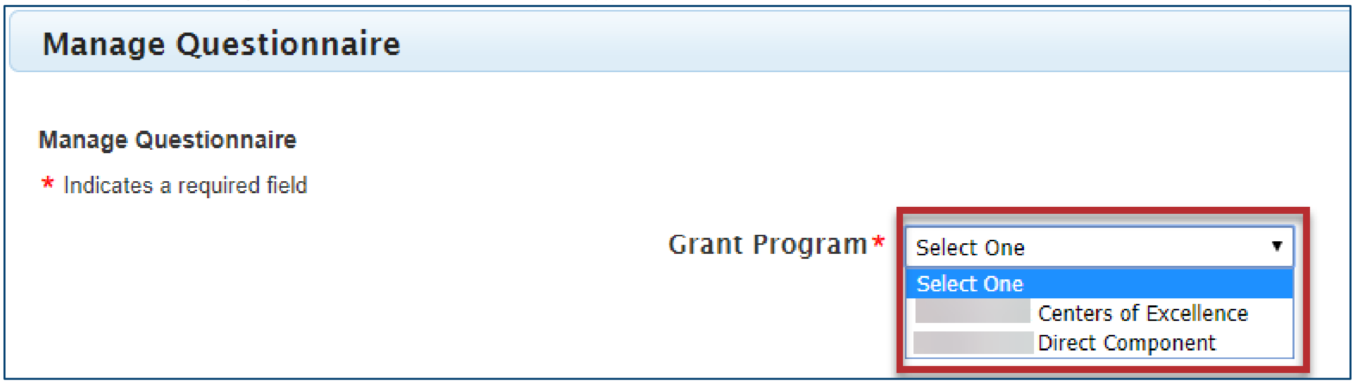

Figure 75: Manage Questionnaire screen - Select Grant Program

3. A list of questionnaires for the selected Grant Program displays. For any *Active* questionnaire, click the **Select** drop-down button from the *Action* column.

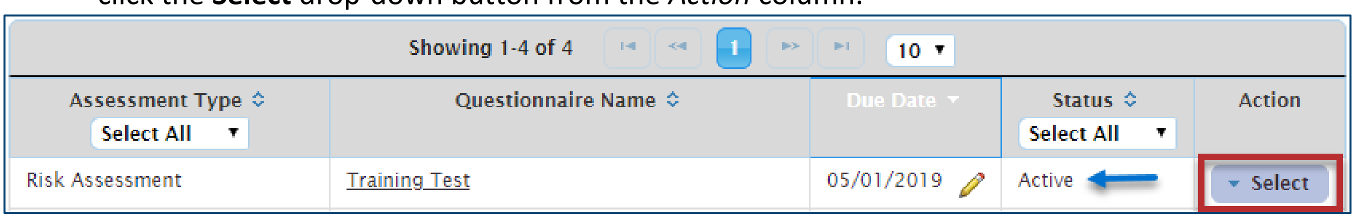

Figure 76:Manage Questionnaire screen - Select button

4. When the drop-down expands, click **Assessments Report**.

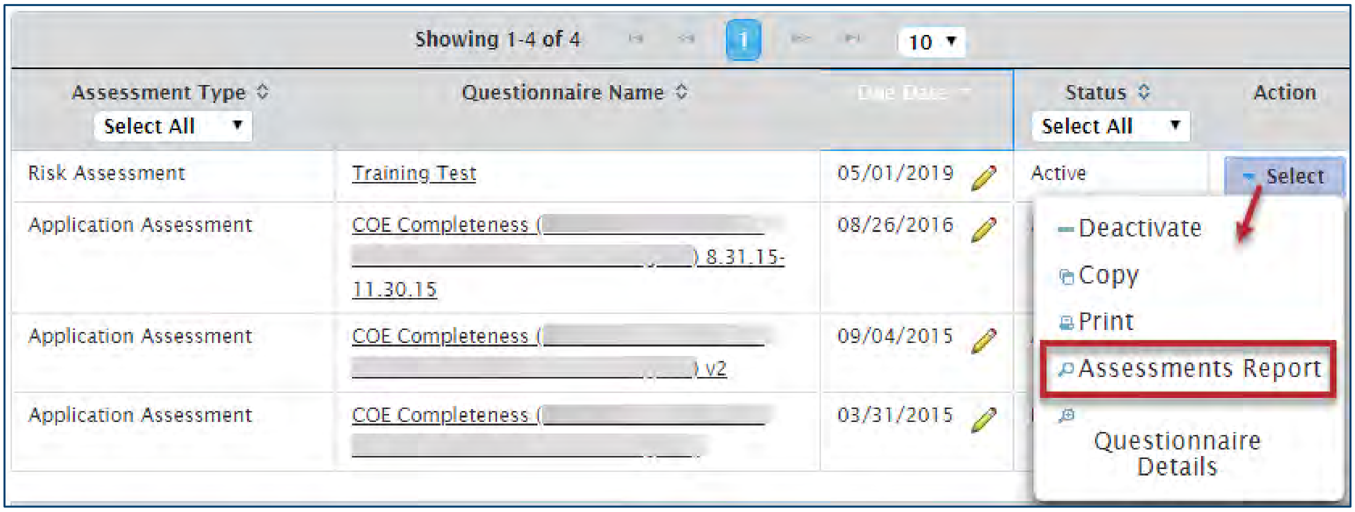

Figure 77: Manage Questionnaire screen - Assessments Report

5. The "Questionnaire Assessments Report" screen appears. For the preferred assessment, click the **Select** drop-down button in the *Action* column.

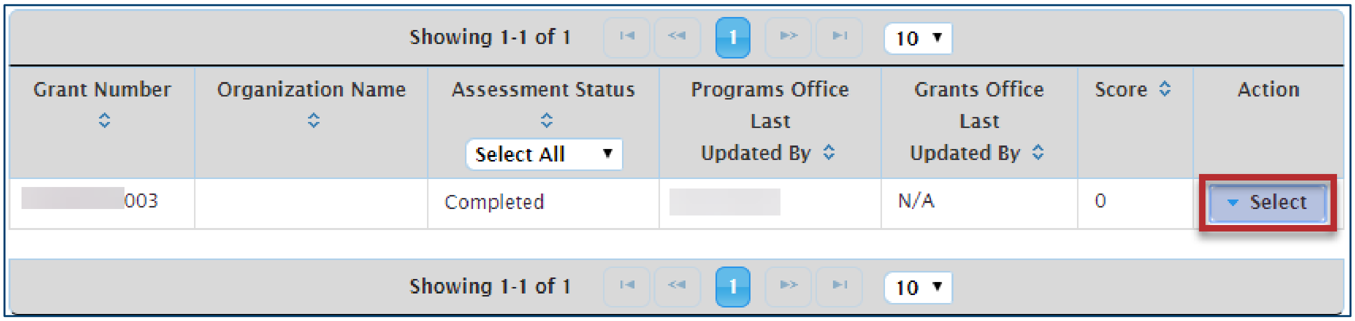

Figure 78: Questionnaire Assessments Report screen - Select button

6. When the drop-down expands, click **View**.

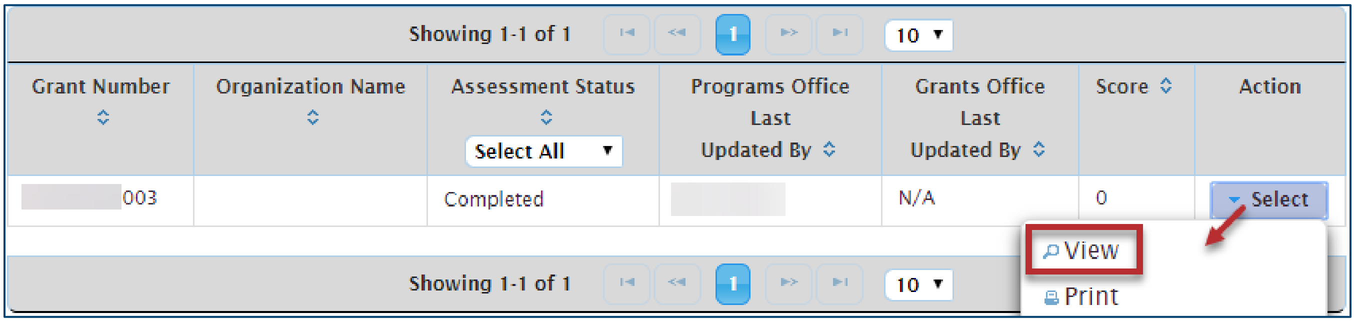

Figure 79: Questionnaire Assessments Report screen - View link

7. The "View Assessment" screen appears. All information entered by the respondent displays.

To sort the list of Assessments:

1. From the GMM Menu bar, select **Grants Management ➔ Project Assessment**.

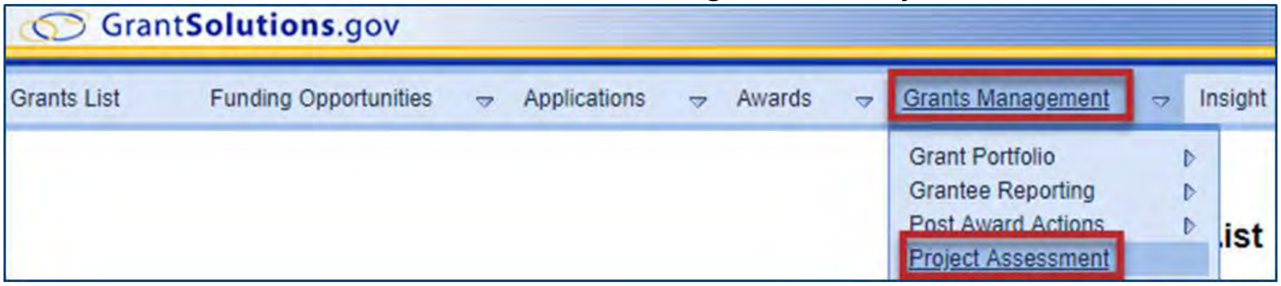

Figure 80: GMM Menu bar - Grants Management > Project Assessment

2. The "Manage Questionnaire" screen appears. Select a **Grant Program** from the drop-down list.

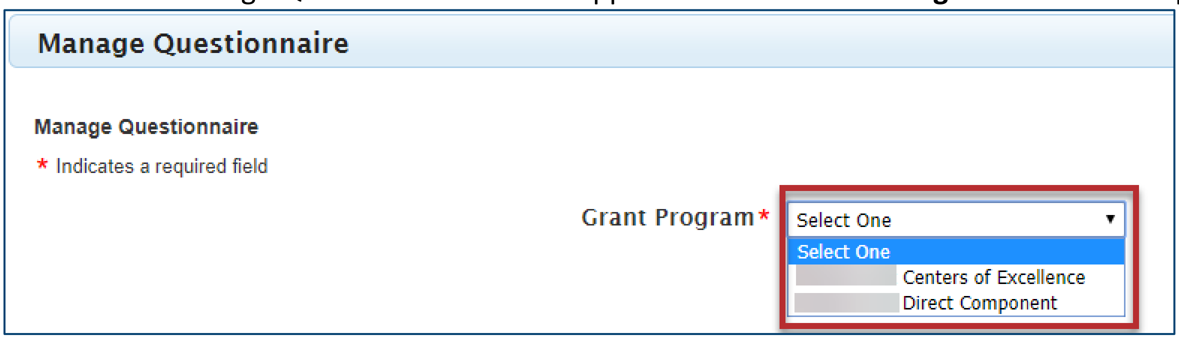

Figure 81: Manage Questionnaire screen - Select Grant Program

3. A list of questionnaires for the selected Grant Program displays. For any *Active* questionnaire, click the **Select** drop-down button from the *Action* column.

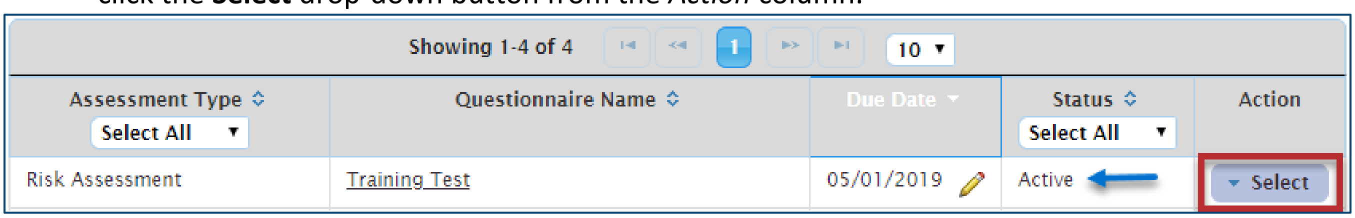

Figure 82: Manage Questionnaire screen - Select button

4. When the drop-down expands, click **Assessments Report**.

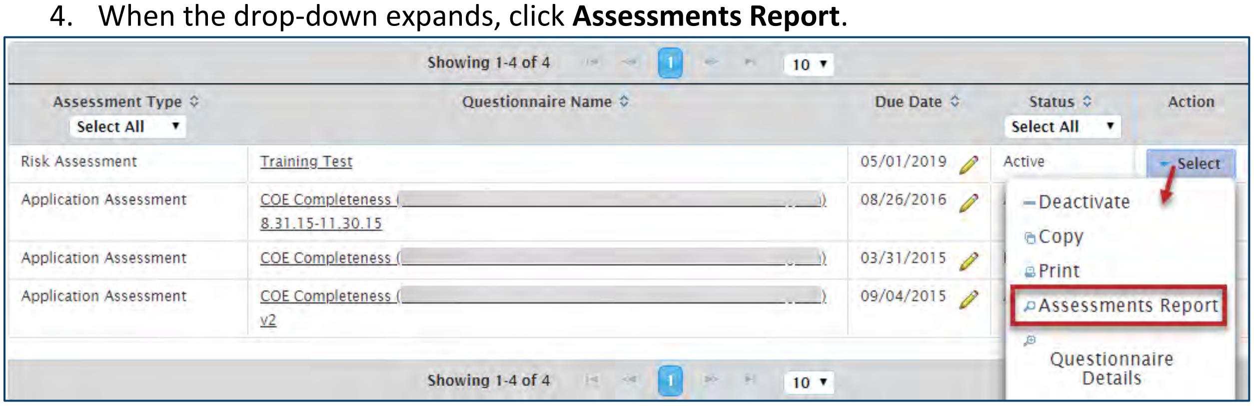

Figure 83: Manage Questionnaire screen - Assessments Report link

5. The "Questionnaire Assessments Report" screen appears. To sort any column in ascending or descending order, click the Up or Down **arrows** to the right of a column header.

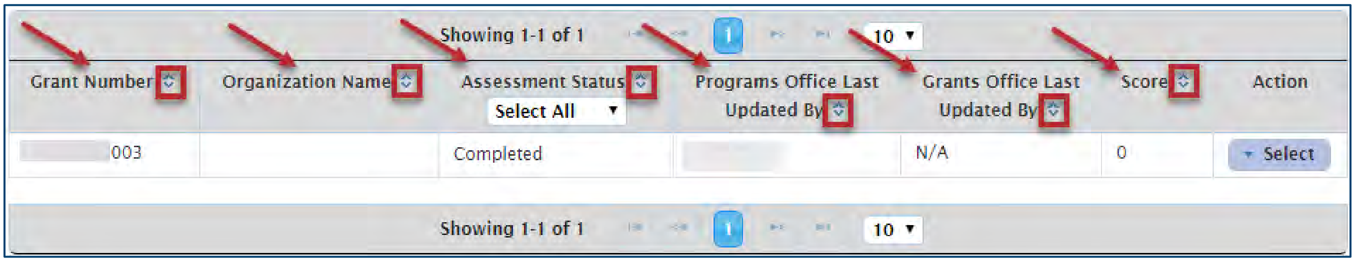

Figure 84: Questionnaire Assessments Report screen – Sort by Column

To filter the list of Assessments:

1. From the *Assessment Status* column on the "Questionnaire Assessments Report" screen, click the drop-down arrow.

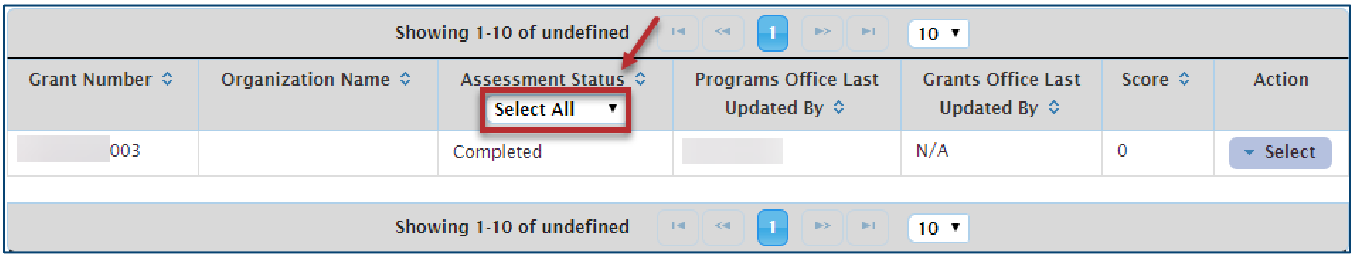

Figure 85: Questionnaire Assessments Report screen - Filter by Assessment Status

2. When the drop-down displays, select the desired **status**.

   Note: Only statuses that populate in the results will appear for selection.

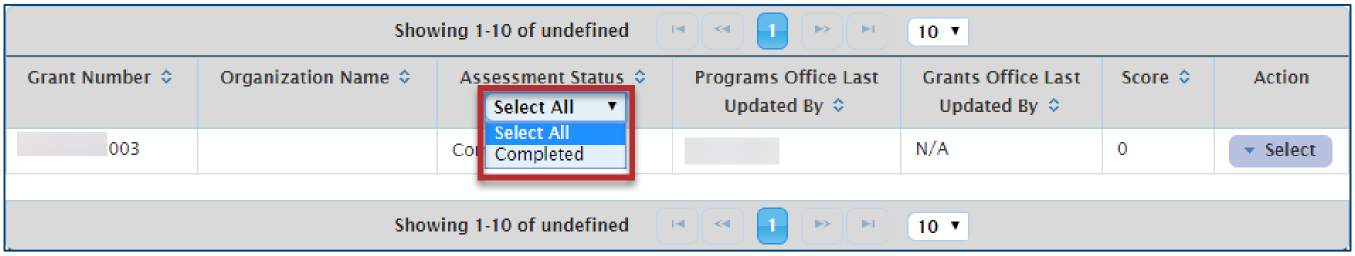

Figure 86: Questionnaire Assessments Report screen - Filter by Assessment Status

3. The table updates to display results matching the selected status.

4. To remove the filter, choose **Select All** from the *Assessment Status* drop-down list.

Getting Assistance

The GrantSolutions Help Desk is available to assist Grantor and Grant Recipient users with technical questions.

HELP DESK CONTACT INFORMATION

Email: Help@grantsolutions.gov

Phone: 1.866.577.0771 or 202.401.5282

Hours of Operation: Monday through Friday 7 a.m. – 8 p.m. ET (closed on Federal holidays).

The GrantSolutions Help Desk contact information is available in multiple locations:

- The GrantSolutions "Contact Us" screen (https://home.grantsolutions.gov/home/contact-us/) and the GrantSolutions "Frequently Asked Questions" screen (https://home.grantsolutions.gov/home/frequently-asked-questions/)

Figure 87: Help Desk Information

- At the bottom of every screen in the GrantSolutions GMM

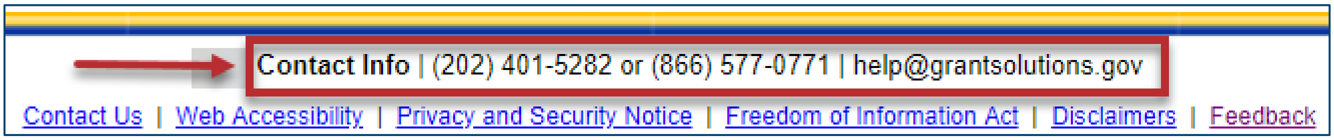

Figure 88: GMM Screen - Help Desk Information

SUBMIT A HELP REQUEST

Users may send questions to the Help Desk directly from the GrantSolutions GMM. This method automatically populates user account information, as well as the screen where the issue was encountered.

To submit a Help Request from within GrantSolutions:

1. From the GMM menu bar, select **Help/Support → Submit a Help Request**.

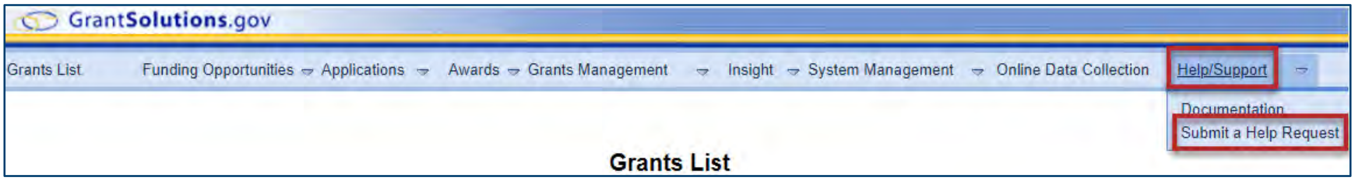

Figure 89: GMM Menu bar - Help/Support > Submit a Help Request

2. The "Help Request" screen appears in a new window. The *First Name*, *Last Name*, *Email*, *Phone Number*, *Service Office*, and *Roles* fields automatically populate. To change the Service Office or Roles, click the corresponding drop-down **arrow** and select from the list.

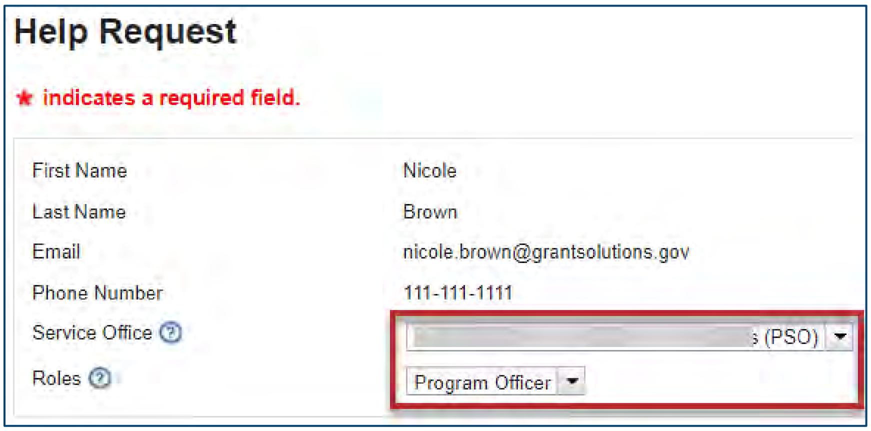

Figure 90: Help Request screen - Prepopulated fields

3. Below the user information, include as many details as possible (Grant Number, Application Number, etc) to enter a required **subject** and **description**.

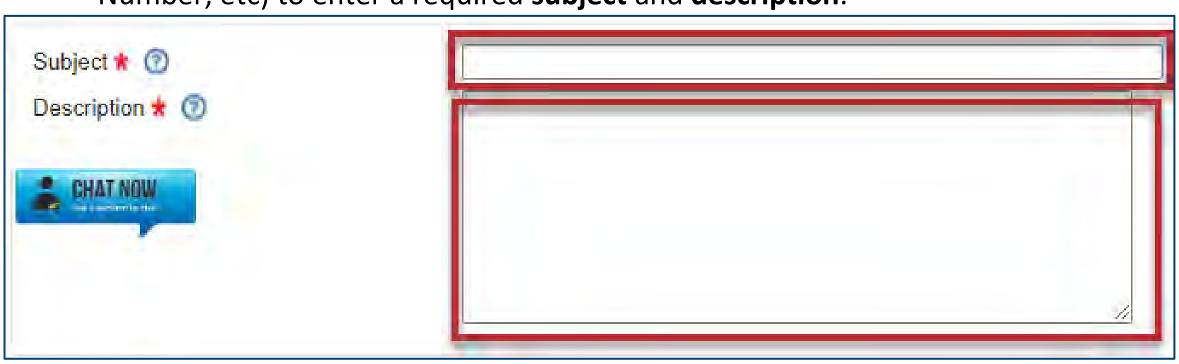

Figure 91: Help Request screen - Subject and Description

4. If desired, upload **files** in the *Attachment* section. When the request is complete, click the **Create Support Ticket** button.

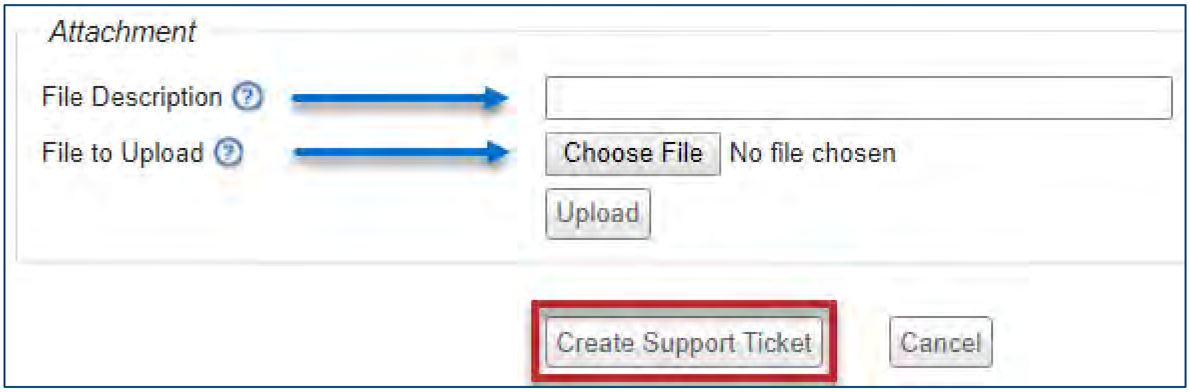

Figure 92: Help Request screen - Create Support Ticket button

5. A confirmation message appears containing the date and time the ticket was created.

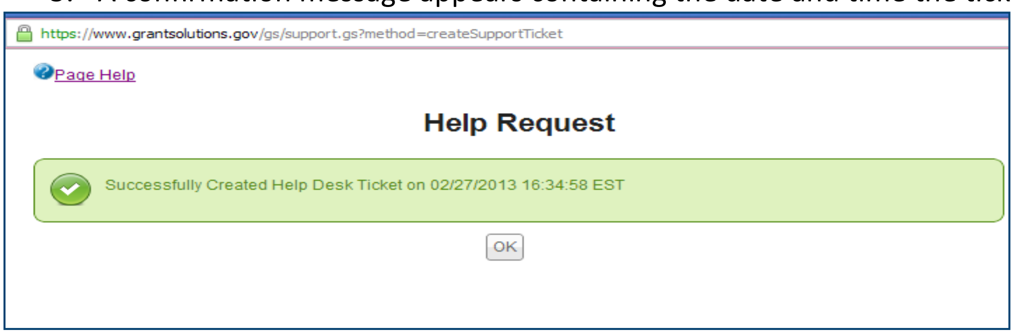

Figure 93: Help Request Confirmation Message

6. An email containing the automatically generated ticket number is sent to the user email address on file.