

Reverse Workflow Actions

GrantSolutions Master Series
Presented by Cher Ann Pepper

Agenda

- Introduction
- New Application Workflows
- Walking back a New Application
- Amendment Processing Workflows
- Walking back an Amendment Application
- Final Q & A





Introduction

This Master Series provides instructions on how to walk back new applications and amendments to an earlier stage in the process or to send the action back to the recipient.











Deleting the Draft Notice of Award



Rejecting the Funding Memo



Deleting the Funding Memo



Withdraw Review



Uncompleting an Application

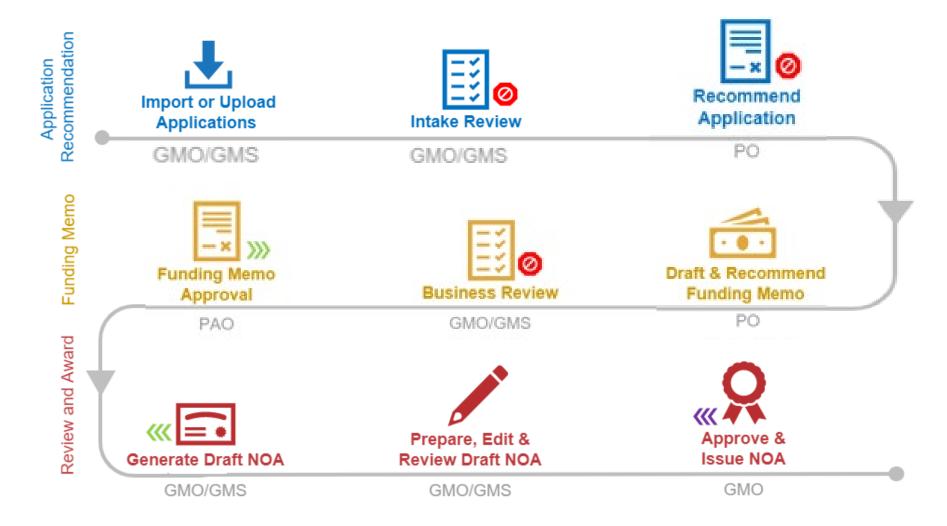


Returning an Application

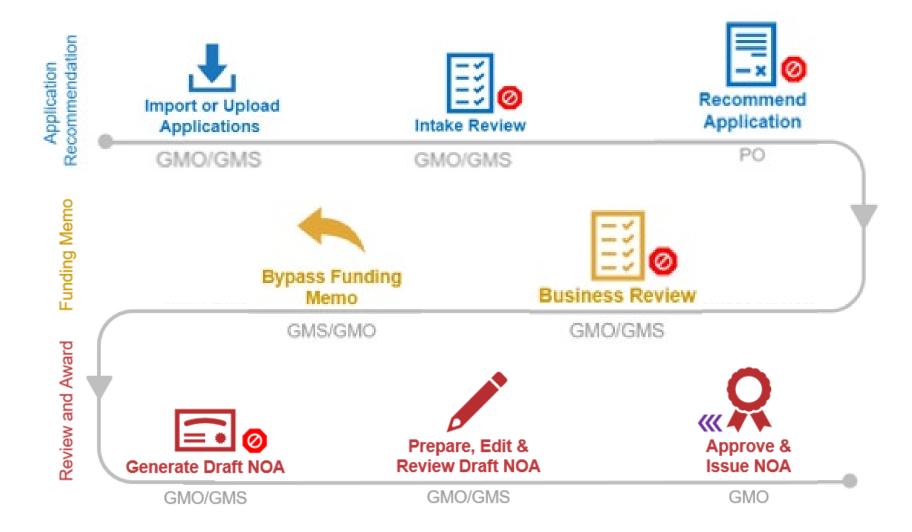




New Application Workflow



New Application Workflow with Funding Memo Bypass



Steps in Walking Back a New Application

Return **Application** Uncomplete the **Application**

Withdraw Review

Delete the **Funding** Memo

Reject or Disapprove & Reopen **Funding Memo**

Delete Notice of Award













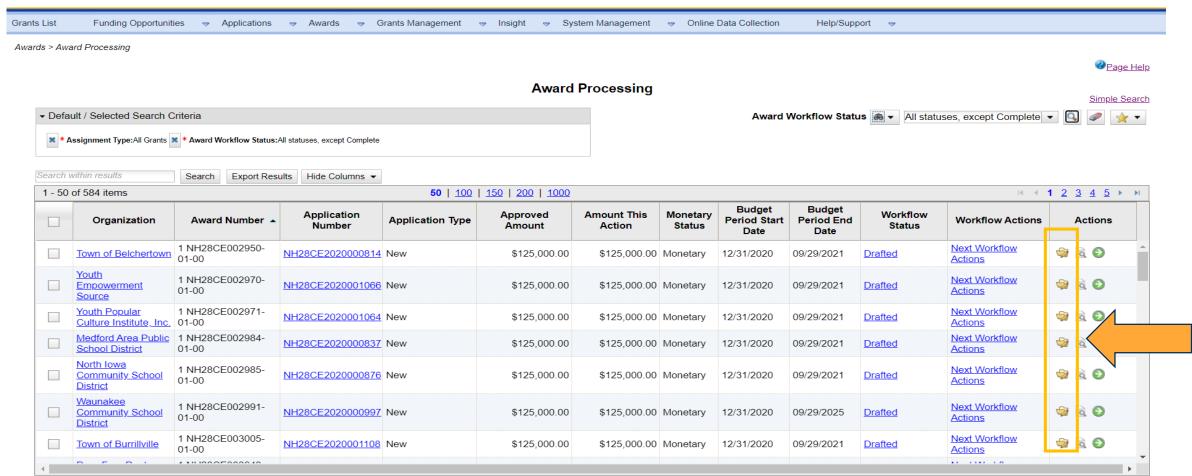






Award Processing

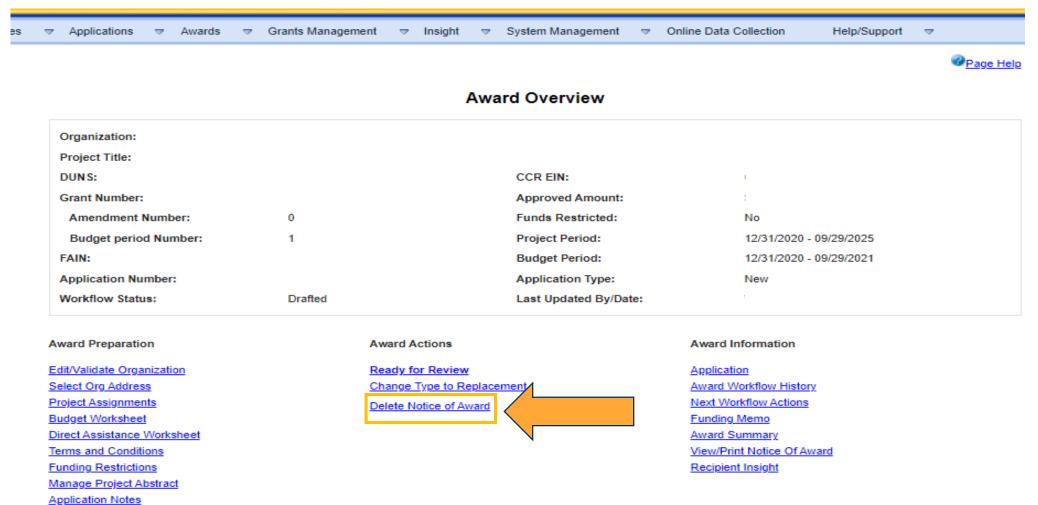
 Awards > Award Processing. GMO or GMS has option to select a yellow folder to open the award to the Award Overview screen to take action in moving award back or forward in the workflow.





Delete Notice of Award

Awards > Award Processing > Award Overview. GMO or GMS has option to select "Delete Notice of Award".

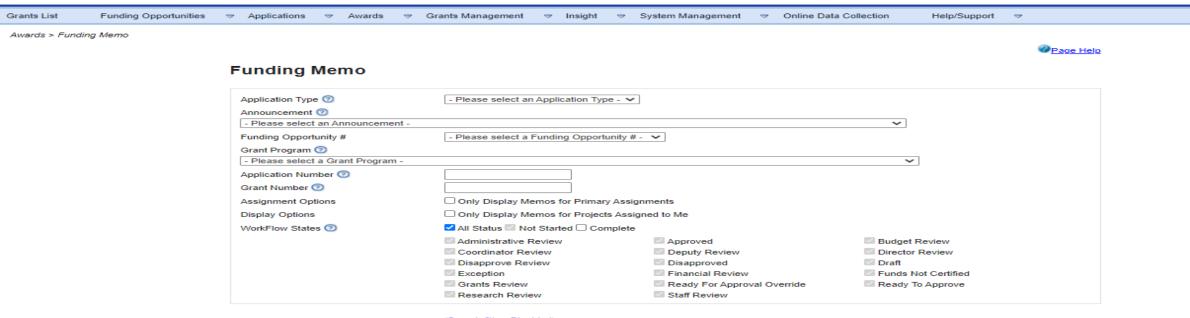


Close



Reject Funding Memo

• Applications > Funding Memo. PAO has option to select "Reject".



(Search filter: Disabled)

Total Records Count: 1

	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	NGA Status	Categories/Locale	Action
	NH28CE2020000959		Dovel	Central Office.	Federal: \$125,000.00 Non-Federal: \$125,868.00	Approved Federal: \$125,000.00	Ready to Generate		<u>History</u> <u>View</u>
	New					Non- Federal: \$125,868.00			View Full Review Application Notes Manage Project Abstract
						Next Workflow Actions			Manage Project Abstract Project Assignments Budget Worksheet
									Business Review Disapprove
									Reject

Disapprove and Reopen Funding Memo

• Applications > Funding Memo. GMO has option to select "Disapprove".

Total Reco	rds Count: 1								
Select	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	NGA Status	Categories/Locale	Action
	NH28CE2020000959		Dovel	Central Office.	Federal: \$125,000.00 Non-Federal: \$125,868.00	Approved Federal: \$125,000.00 Non-	Ready to Generate		History View View Full Review
	New					Federal: \$125,868.00			Application Notes Manage Project Abstract
						Next Workflow Actions			Budget Worksheet Business Review
									Disapprove Generate

• GMO has option to select "Reopen".

Select -	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
	NH28CE2020000959 New			Central Office.	Federal: \$125,000.00 Non-Federal: \$125,868.00	Disapproved Federal: \$125,000.00 Non- Federal: \$125,868.00 Next Workflow Actions	_	History View View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Business Review Reopen



Delete Funding Memo

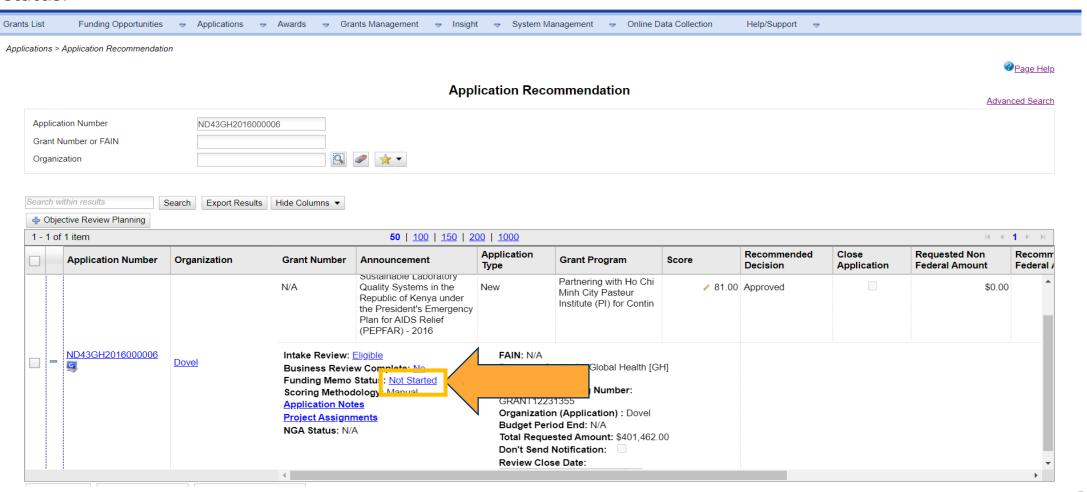
• Applications > Funding Memo. PO has option to select "Delete".

Next Workflow Actions Next Workflow Actions Application No	Total Reco	rds Count: 1							
New Non-Federal: \$125,868.00 Federal: \$125,000.00 History			Grant Number	Applicant/Grantee	Service Area	_	Memo Status	Categories/Locale	Action
Recommend		•		Dovel			Federal: \$125,000.00 Non- Federal: \$125,868.00		History View View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Business Review



Delete Funding Memo

 Applications > Application Recommendation. PO has option to select edit, if Funding Memo is in "Not Started" status.

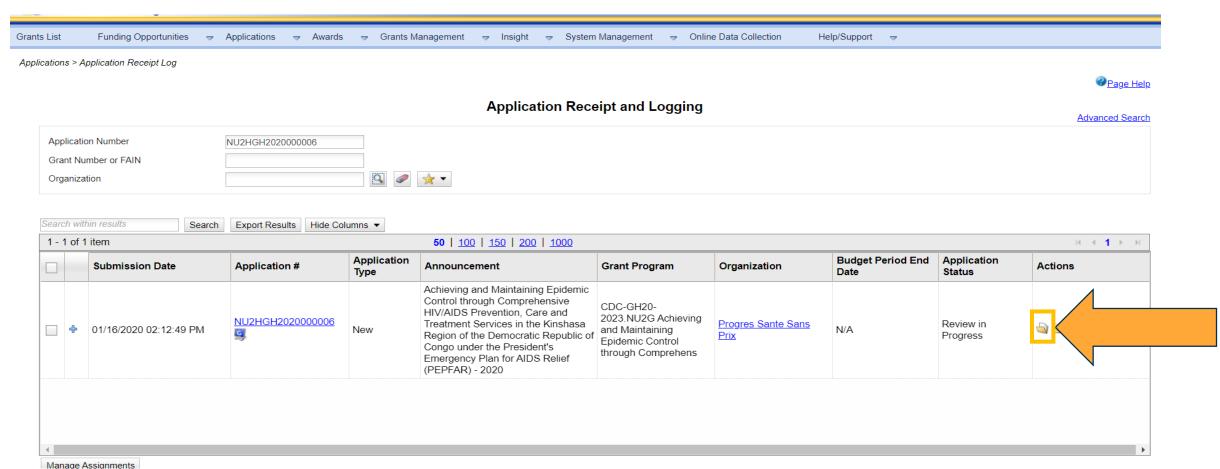




Application Receipt and Logging

• Applications > Application Receipt and Logging > Open Application

. GMO or GMS have the option to select the Open Application icon.





Withdraw Review

• Applications > Application Receipt and Logging > Open Application

. GMO or GMS have the option to select
"Withdraw Review" on the GrantSolutions Application Control Checklist screen.

Online Forms	Enclosure(s)	Attachment(s)	Status
SF-424 Application for Federal Assistance Version 2	<u>View Online</u> <u>Print Completed</u>	25 <u>Uploaded Files</u> 0 <u>Mail-in Items</u>	✓
SF-424A Budget Information - Non-Construction	<u>View Online</u> <u>Print Completed</u>	0 <u>Uploaded Files</u> 0 <u>Mail-in Items</u>	✓
SF-LLL Disclosure of Lobbying Activities	<u>View Online</u> <u>Print Completed</u>	0 <u>Uploaded Files</u> 0 <u>Mail-in Items</u>	✓
Project Abstract Summary	<u>View Online</u> <u>Print Completed</u>	0 <u>Uploaded Files</u> 0 <u>Mail-in Items</u>	✓
Additional Information to be Submitted	Enclosure(s)	Attachment(s)	Status
Miscellaneous		0 <u>Uploaded Files</u> 0 <u>Mail-in Items</u>	✓

Post Submission Supplemental Information

Description	Attachment(s): Uploaded Files			
No Attachments Uploaded				

Application Package Status: Review in Progress

Sent To Review Status: Yes

Mail-In Package Information: CDC Office of Financial Resources is currently not expecting to receive a Mail-In Package for this application.







Return Application

• Applications > Application Receipt and Logging > Open Application

. GMO or GMS have the option to select
"Withdraw Review" on the GrantSolutions Application Control Checklist screen.

Post Submission Supplemental Information

Description Attachment(s): Uploaded Files					
	No Attachments Uploaded				

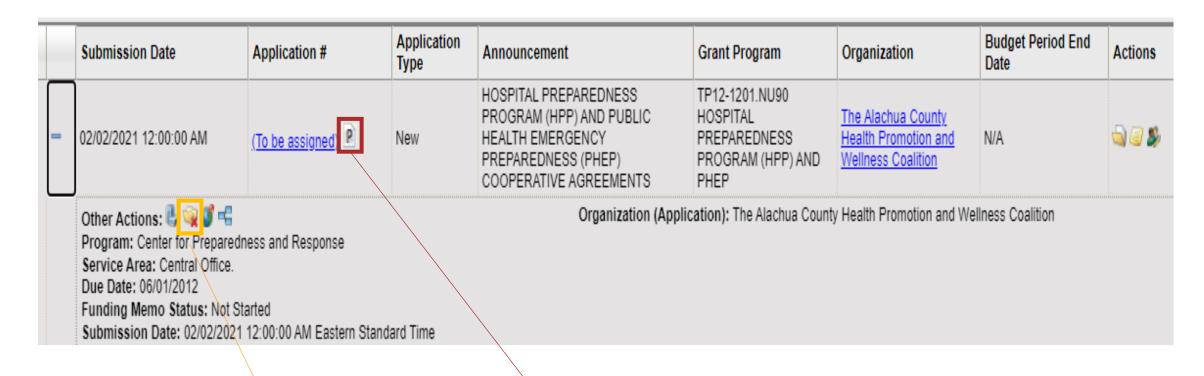
Mail-In Package Information: CDC Office of Financial Resources is currently not expecting to receive a Mail-In Package for this application.





Delete Application

• Applications > Application Receipt and Logging. GMO or GMS have the option to select "Delete Application 📦 "icon.



Delete Application Icon

Paper Submission Icon





Amendment Workflow with Funding Memo

Funding Memo









GMO/GMS

GMO/GMS



Prepare, Edit & **Review Draft** Amendment

GMO

GMO/GMS



Amendment Workflow with Funding Memo Bypass

Funding Memo Verify Draft Create & Submit Bypass Funding **Amendment** Amendment Memo GMO/GMS GMO/GMS GMO/GMS Review and Issue Prepare, Edit & Approve & Issue **Review Draft** Amendment Amendment **GMO** GMO/GMS

Steps in Walking Back an Amendment Application

Return the Amendment Application Uncomplete the Amendment Application

Delete the Funding Memo

Reject the Funding Memo

Delete Notice of Award



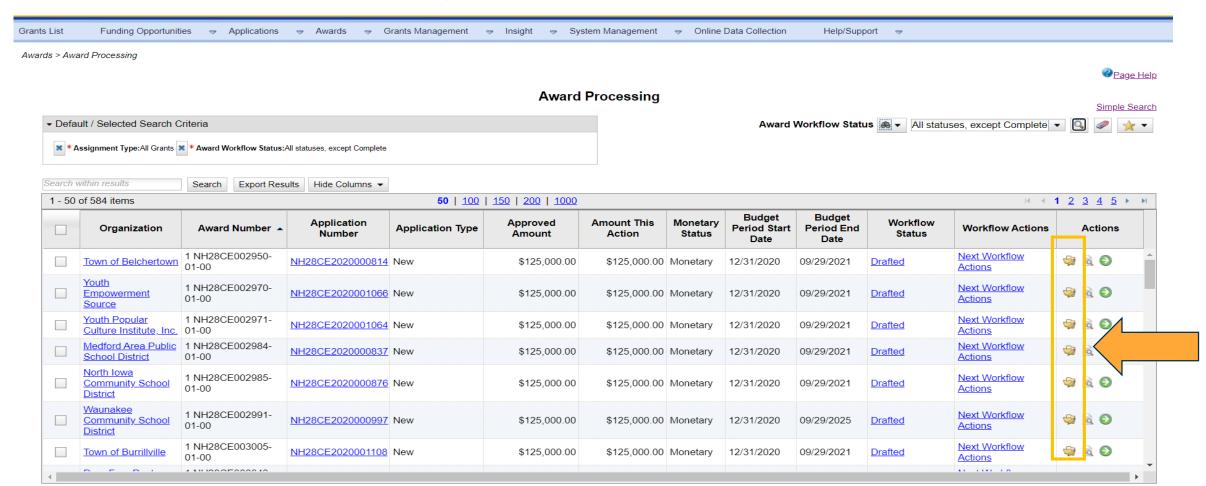






Award Processing

 Awards > Award Processing. GMO or GMS has option to select a yellow folder to open the award to the Award Overview screen to take action in moving award back or forward in the workflow.

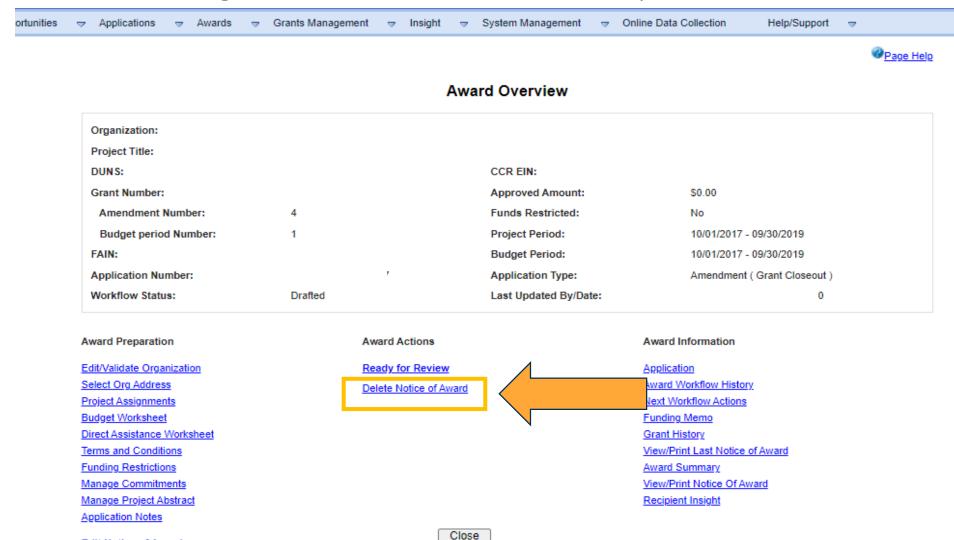




Delete Notice of Award

Edit Notice of Award

• Awards > Award Processing > Award Overview. GMO or GMS has option to select "Delete Notice of Award".





Reject Funding Memo

• Applications > Funding Memo. PAO has option to select "Reject".

Total Records Count: 1

Select Application Number / Application Type	Grant Number Budget Period	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	NGA Status	Categories/Locale	Action
•	NB01DP009013 Budget Period: 12	Georgia Departme nt of Public Health		Federal: N/A Non-Federal: N/A	Approved Federal: \$0.00 Non- Federal: \$0.00 Next Workflow Actions			History Manage Commitment Set Budget Period View Grant Notes Manage Project Abstract Project Assignments Budget Worksheet Disapprove Reject



Disapprove and Reopen Funding Memo

• Applications > Funding Memo. GMO has option to select "Disapprove".

Select Application Type Application Type NB010T2020000932	Total Reco	rds Count: 1								
(Amendment: Grant Closeout) Budget Period: 1 of Health Group of Health Group Office. Non-Federal: N/A Federal: \$0.00 Non-Federal: \$0.00 Non-Federal: \$0.00 Next Workflow Actions Disapprove Office. Non-Federal: N/A Federal: \$0.00 Non-Federal: \$0.00 Next Workflow Actions Disapprove	Select	Application Number / Application Type	Grant Number Budget Period	Applicant/Grantee	Service Area	_	Memo Status	NGA Status	Categories/Locale	Action
		(Amendment: Grant		of Health Group			Federal: \$0.00 Non- Federal: \$0.00 Next Workflow	-		Manage Commitment Set Budget Period View Grant Notes Manage Project Abstract Project Assignments Budget Worksher Disapprove

• GMO has option to select "Reopen".

Total Records Count: 1							
Select Application Number / Application Type	Grant Number Budget Period	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
NB01OT2020000932 (Amendment: Grant Closeout)	NB01OT009232 Budget Period: 1	Virgin Islands Dept of Healt h Group	Central Office.	Federal: N/A Non-Federal: N/A	Disapproved Federal: \$0.00 Non- Federal: \$0.00 Next Workflow Actions		History Manage Commitment Set Budget Period View Grant Notes Manage Project Abstract Project Assignments Budget Workshalt Reopen



Delete Funding Memo

• Applications > Funding Memo. PO has option to select "Delete".

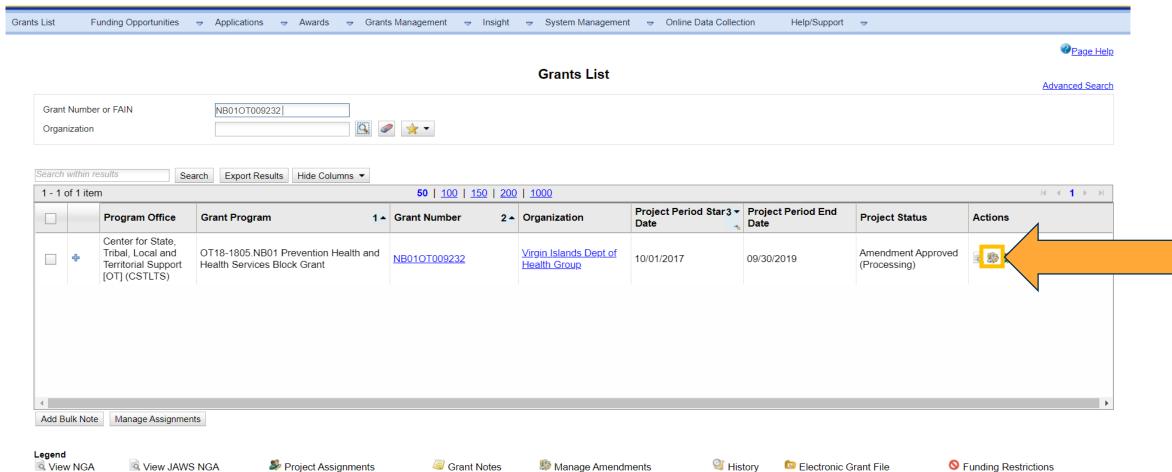
Total Records Count: 1

Select Application	on Number / Grant Number on Type Budget Period	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
	ent: Grant Rudget Deried	Virgin Islands Dept of Healt h Group	Central Office.	Federal: N/A Non-Federal: N/A	Draft Federal: \$0.00 Non- Federal: \$0.00 Next Workflow Actions		Delete Edit History Manage Commitment Set Budget Period View Grant Notes Manage Project Abstrace Project Assignments Budget Worksheet Recommend



Grants List (Manage Amendments)

Grants List > Manage Amendments (ID Manage Amendments). GMO and GMS have option to select ID Manage Amendments





Uncomplete Amendment Application

• Grants List > Manage Amendments (Manage Amendments) > View Amendment. GMO and GMS have option to select "Uncomplete Amendment" on GrantSolutions Amendment Application Control Checklist screen.

Original Submission

Applicant	Virgin Islands Dept of Health Group
Grant Number	NB01OT009232
Application Number	NB01OT2020000932 S
Action	Grant Closeout
Project Title	Preventive Health and Health Services Block Grant 2018
Submitted Date	02/28/2020 03:19 PM Eastern Time

Grant Announcement	Enclosure(s)	Attachment(s)	Status
Application Upload		3 <u>Uploaded Files</u> 0 <u>Mail-in Items</u>	✓
Additional Information to be Submitted	Enclosure(s)	Attachment(s)	Status
Miscellaneous		1 <u>Uploaded Files</u> 0 <u>Mail-in Items</u>	✓

Post Submission Supplemental Information

Description	Attachment(s): Uploaded Files			
No Attachments Uploaded				

Amendment Package Status: Complete (Post Award)

Mail-In Package Information: CDC Office of Financial Resources is currently not expecting to receive Application Notes

Uncomplete Amendment



Return Amendment Application

• Grants List > Manage Amendments (Manage Amendments). GMO and GMS have option to select "Return" on Manage Amendment screen.

Manage Amendments

Grant Number NB01OT009232

Grantee Name Virgin Islands Dept of Health Group

Project Title Preventive Health and Health Services Block Grant 2018

Project Start Date 10/01/2017

Project End Date 09/30/2019

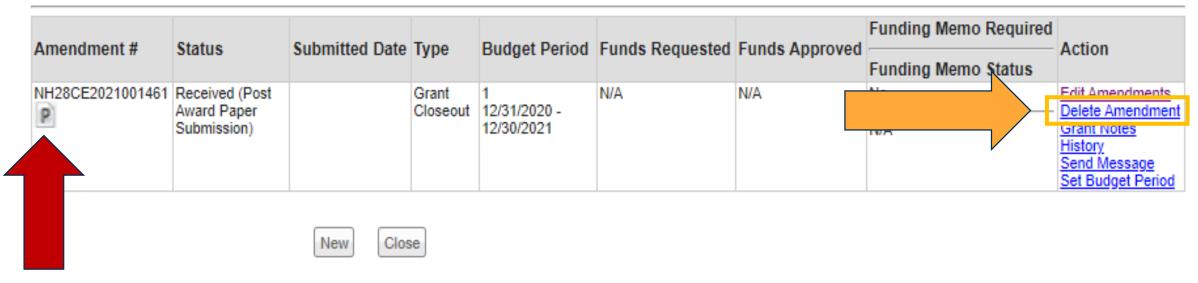
Last Issued NGA 10/03/2018 (View NGA)

Amendment #	Status	Submitted Date	Tuno	Budget Period	Funds Doguested	Funds Approved	Funding Memo Required	Action
Amendment#	Status	Submitted Date	Type	Budget Period	et Period Funds Requested F	runus Approved	Funding Memo Status	Action
NB01OT2020000932		02/28/2020 03:19:30 PM	Grant Closeout	1 10/01/2017 - 09/30/2019	N/A	N/A	NIZA	Return Set Sudget Grant Notes History Send Message



Delete Amendment Application

- Federal initiated amendments allow the option to delete an amendment.
- Grants List > Manage Amendments (Manage Amendments). GMO and GMS have option to select "Delete Amendment" on Manage Amendment screen.







Help Desk

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









