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PARTNERS IN INNOVATION

GrantSolutions Master Series: Project Assignments

February 16, 2023

Setting the Stage

The GrantSolutions Masters Series course is:

- ✓A high-level overview of Project Assignments in GrantSolutions
- ✓An opportunity to learn more about Project Assignment features
- ✓An opportunity to enter questions into the Q&A chat during class. Time will be allotted for Q&A

Setting the Stage

The GrantSolutions Master series course is NOT:

- x A detailed dive into Project Assignments
- x A platform to discuss business process
- x An opportunity to discuss partner needs

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Agenda

- Objectives
- Introduction
  - What is Project Assignments?
  - Benefits of Project Assignments
- Project Assignment Permissions
- Primary Project Assignments
- Project Assignment Locations
- Project Assignment Screens
- Manage Project Assignments for Multiple Awards (Bulk Project Assignments)
- Resources and Post session Follow-Up
- Help Desk
- Questions and Answers

Objectives

- Understand the benefits of Project Assignments
- Locate where Project Assignments are made in GrantSolutions
- Make Primary Project Assignments in GrantSolutions
- Manage Project Assignments for Multiple Awards

Introduction

GrantSolutions Project Assignments

Introduction: What is Project Assignments?

- Project Assignments are used to assign Federal and Contract staff to a Grant project portfolio. After Project Assignments are complete, users can perform actions to move an application or grant modification forward in the workflow.

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Introduction: Benefits of Project Assignments

- Drives email notifications. 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 Correspondence Notes for a Grant project
- Simplifies Searching
  - When a project assignment is made, users can easily search for their workload by utilizing the advanced search screens
    - **Example*: Application Recommendation and Grants List Screens – Criteria: Assignment Type, Filter: My Applications/My Grants or My Primary Grants***
- Tasks available are on the GrantSolutions Portal Task List if a user has Primary Project Assignments

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Introduction: Who can have a Project Assignment?

- By default, the Grants Management Officer (GMO) listed on a Funding Opportunity Announcement is automatically assigned to the grant project. A GMO must always be assigned to a grant project.
- Users may assign themselves to an application or grant within their office
  - Program Office staff may only add or remove project assignments for other Program Office staff
  - Grant Office staff may add or remove project assignments for other Grant Office staff, Program staff, and grant recipients

Note: It is best practice for Grantors and Contract staff to make project assignments early on in the workflow.

Project Assignment Permissions

Project Assignment Permissions

- Users may assign themselves to an application or award within GrantSolutions

Assigned Role	Authority to Assign
Grants Management Officer (GMO)	All Grantor and Recipient Roles
Grants Management Specialist (GMS)	All Grantor and Recipient Roles except GMO
Grants Support Specialist (GSS)	None (Read-only access)
Program Authorizing Official (AO)	All Program Office roles
Deputy Authorizing Official (DAO)	All Program Office roles except for AO
Program Office Director (OD)	OD, PC, PO, PSS
Program Coordinator (PC)	PC, PO, PSS
Program Office (PO)	PO and PSS
Program Support (PSS)	None (Ready-only access)
Financial Management Officer (FMO)	FMO
Program Budget Officer (PBO)	PBO

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Primary Project Assignments

What are Primary Project Assignments?

- Primary Project Assignments identify the user ultimately responsible for performing a task
  - A task is displayed on the Portal Task list for users with Primary Assignments
- Only one user can have the Primary assignment per role
  - Multiple staff members with the same role can be assigned to the same grant project
- Users may change the primary assignment on the Project Assignments screen

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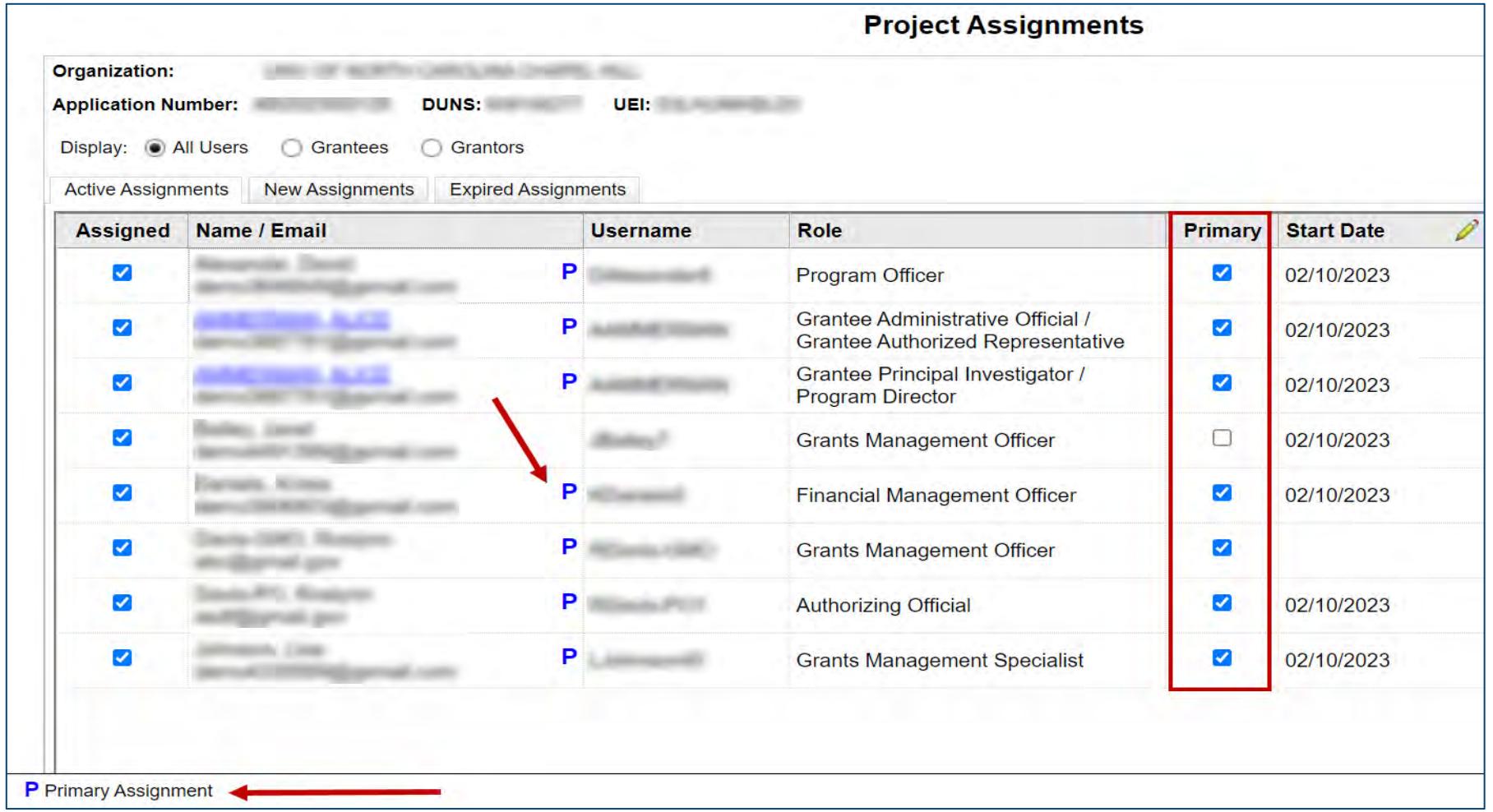
Project Assignment Screen – Primary Assignment Indicator

- The **P** icon indicates the user has a Primary Project Assignment

Note: If another user is selected as the Primary, when clicking the checkbox for a new user with the same role, the system automatically removes the Primary assignment for the previous user.



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Project Assignment Locations

Project Assignment Locations

- Project Assignments can be accessed from the Results table of:
  - The Application Receipt and Logging screen
  - The Application Recommendation screen
  - The Funding Memo screen
  - The Award Processing – Award Overview screen
  - The Grants List screen

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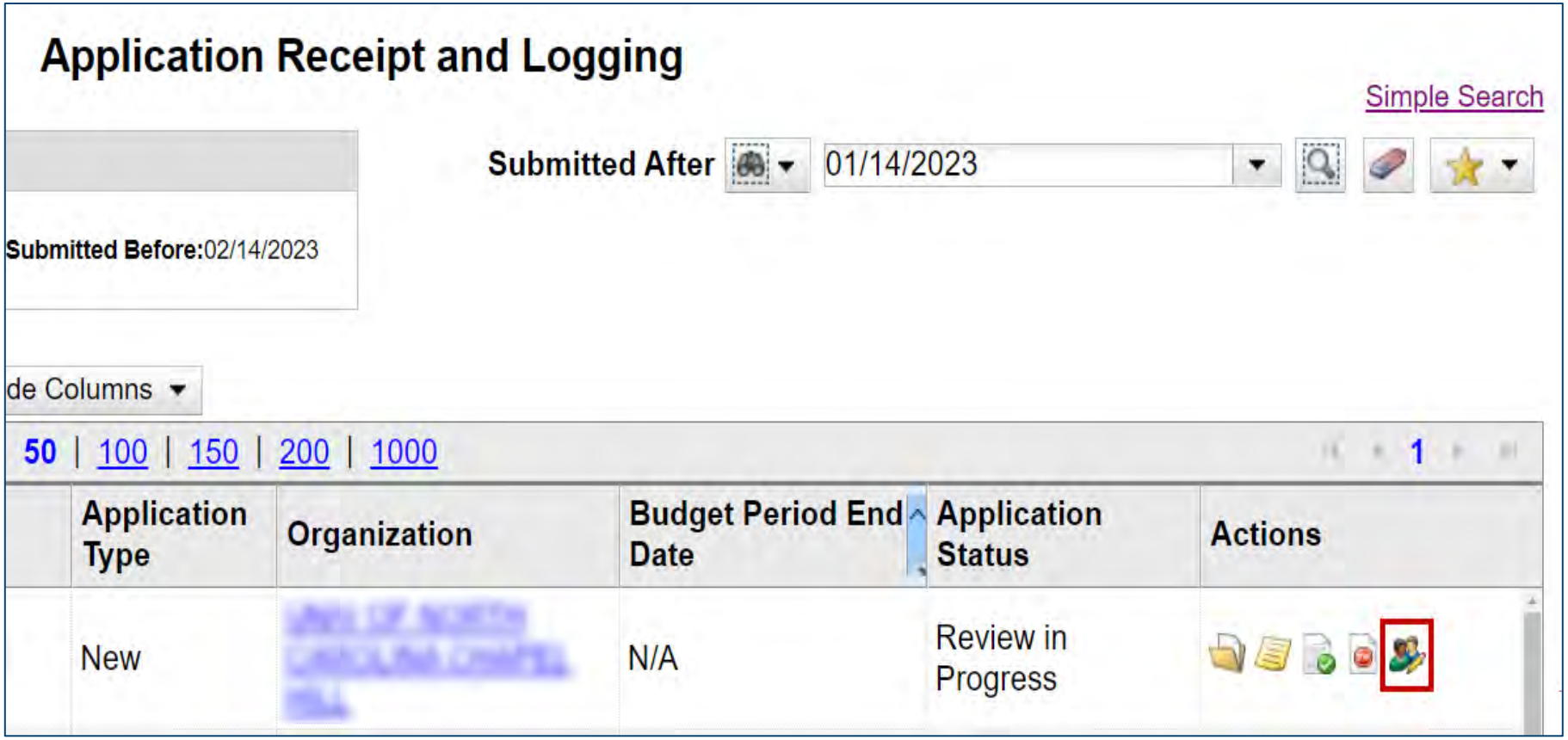
Project Assignments Locations: *Application Receipt and Logging Screen*

- From the results table, in the Actions column the Project Assignments icon will appear



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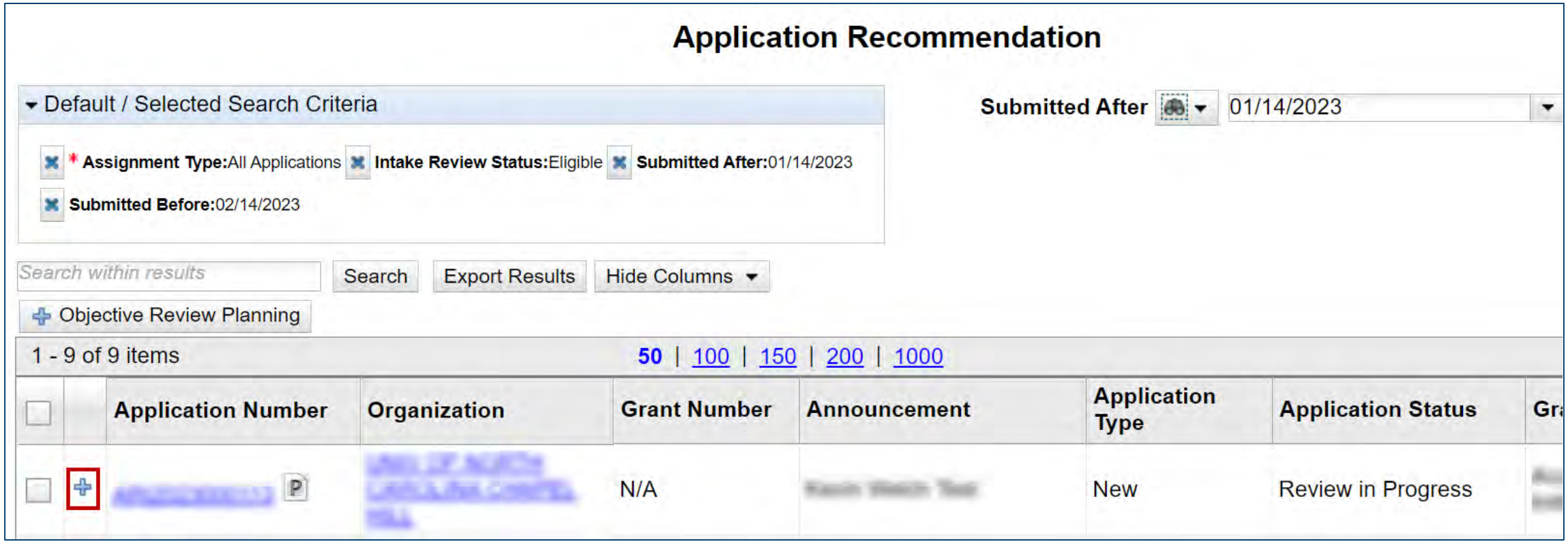
Project Assignments Locations: *Application Recommendation Screen*

- From the Results table, click the blue plus sign to expand the table



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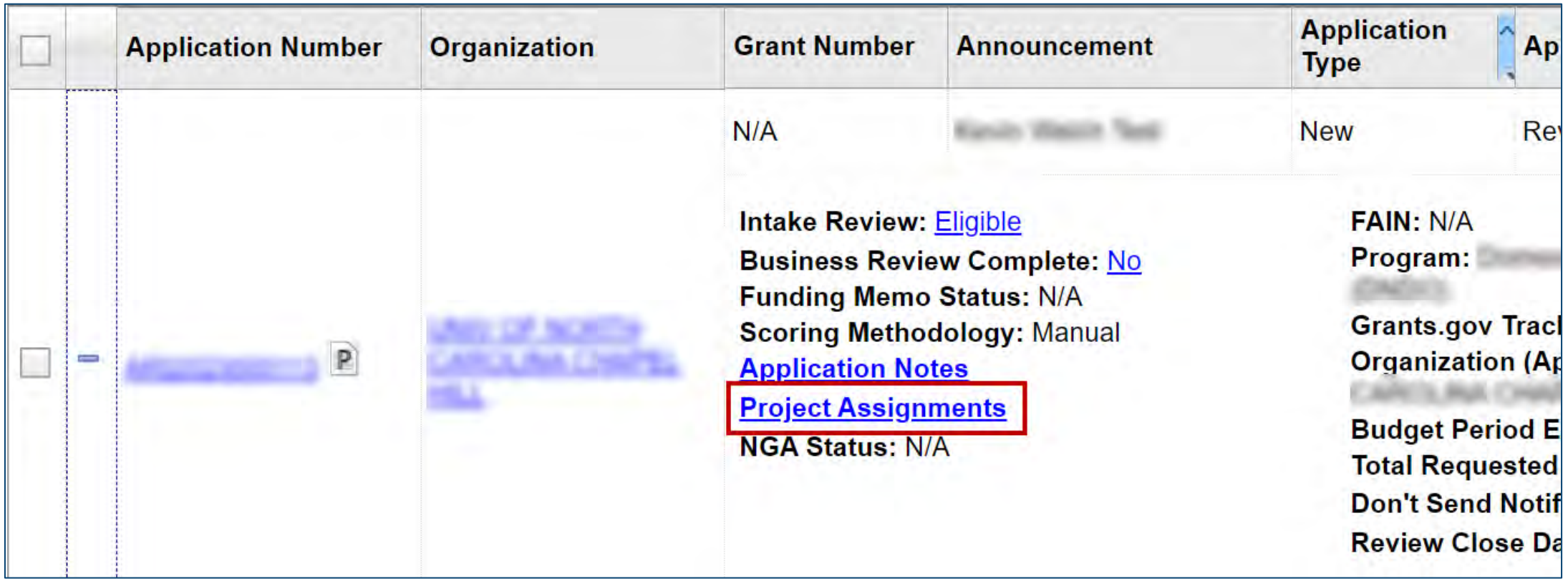
Project Assignments Locations:
Application Recommendation Screen (Continued)

- In the expanded result, click the Project Assignments hyperlink



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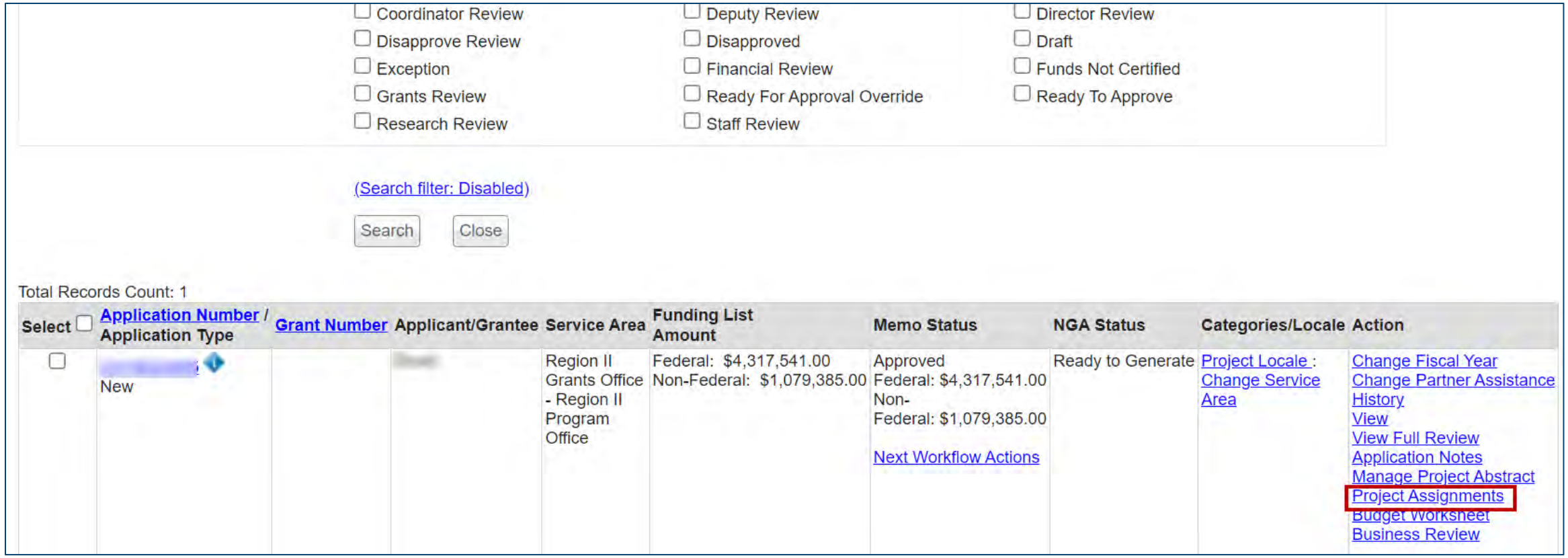
Project Assignments Locations: *Funding Memo Screen*

- On the Funding Memo screen, in the Action column the Project Assignment hyperlink will appear



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)

Search Close

Total Records Count: 1

Select	Application Number / Application Type	Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	NGA Status	Categories/Locale	Action
	New			Region II Grants Office - Region II Program Office	Federal: $4,317,541.00 Non-Federal: $1,079,385.00	Approved Federal: $4,317,541.00 Non-Federal: $1,079,385.00 Next Workflow Actions	Ready to Generate	Project Locale : Change Service Area	Change Fiscal Year Change Partner Assistance History View View Full Review Application Notes Manage Project Abstract Project Assignments Budget Worksheet Business Review

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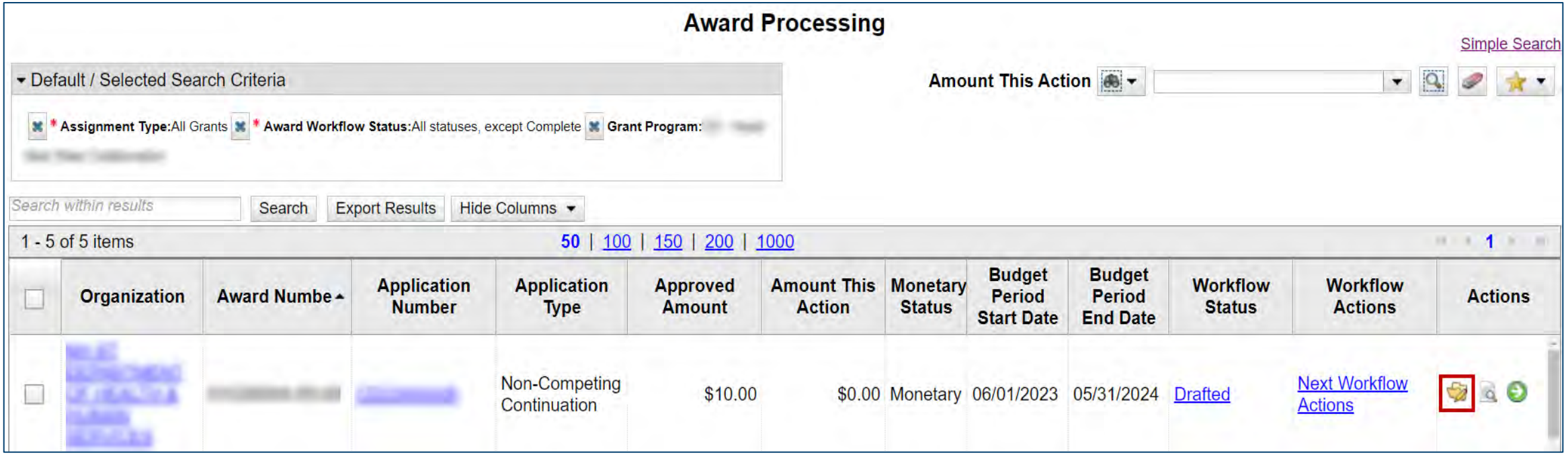
Project Assignments Locations:
Award Processing – Award Overview Screen

- From the results table, in the Actions column, click the folder icon



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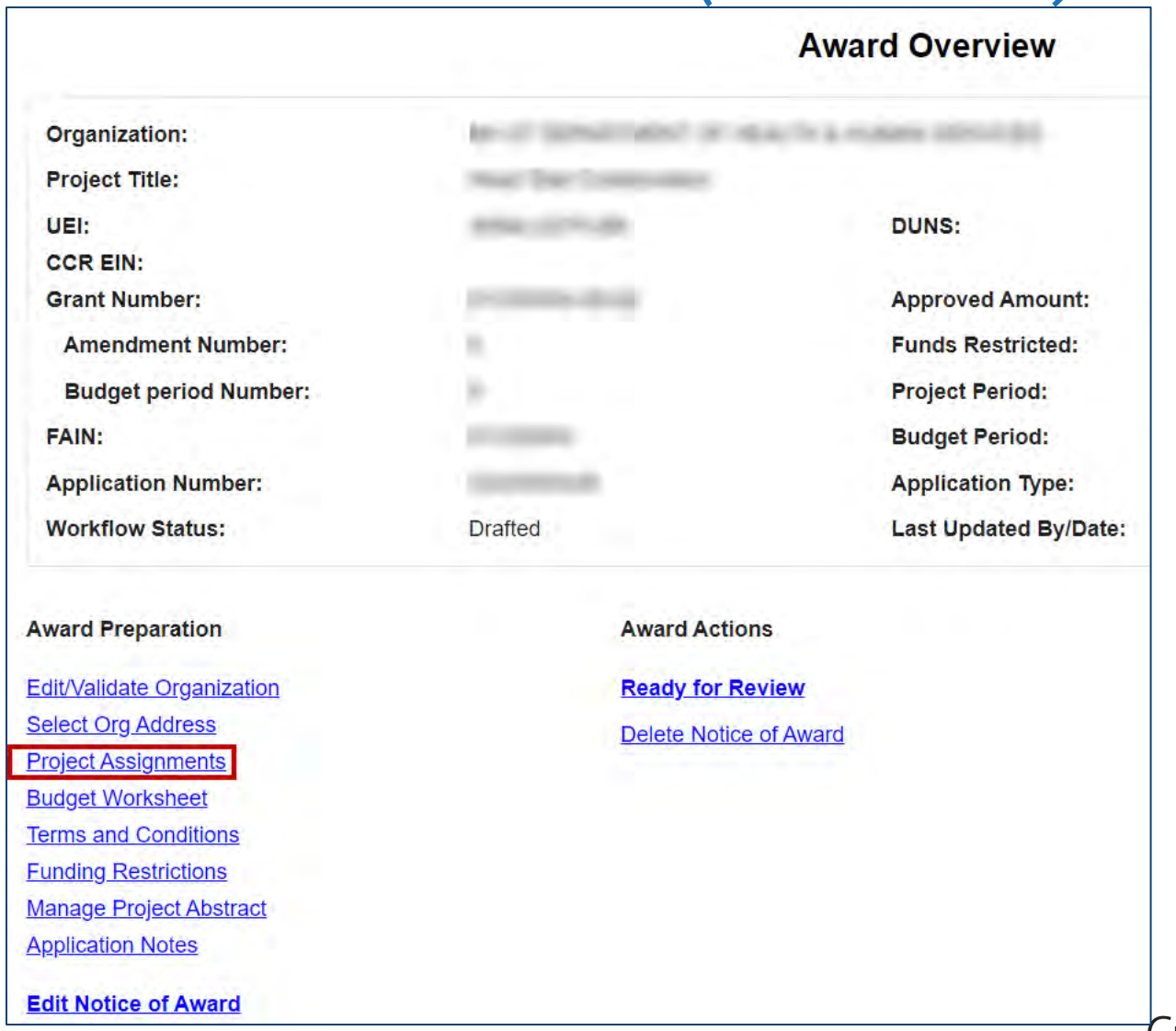
Project Assignments Locations:
Award Processing – Award Overview Screen (Continued)

- When the Award Overview screen appears under the Award Preparation section, click the Project Assignments hyperlink



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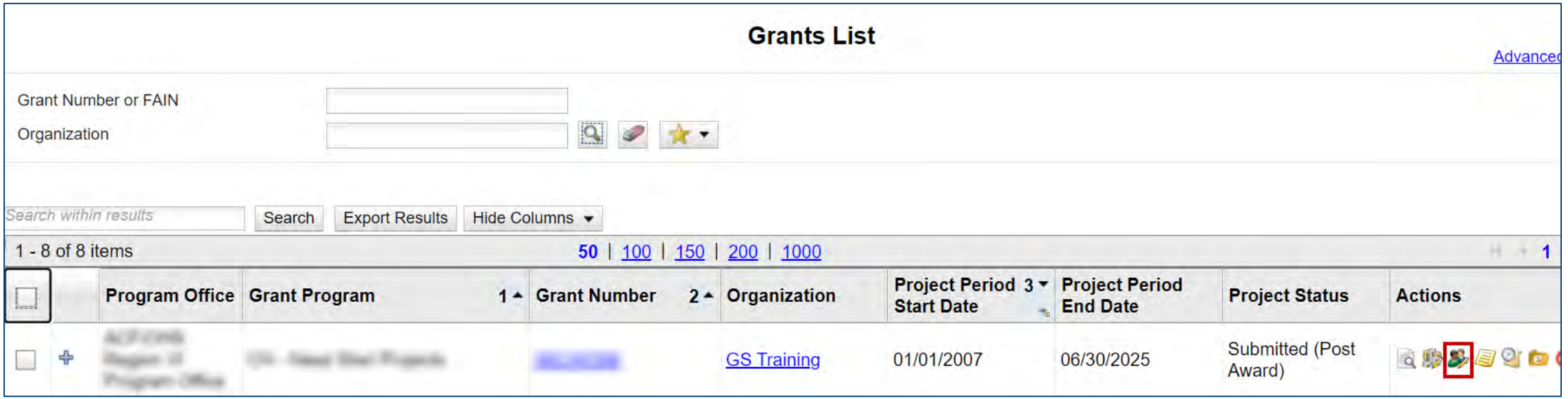
Project Assignments Locations:
The Grants List Screen

- From the results table, in the Actions column, click the Project Assignments icon



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Project Assignments Screen

Project Assignments Screen – Key Components

- Active Assignments Tab
- New Assignments Tab
- Expired Assignments Tab
- Additional Features

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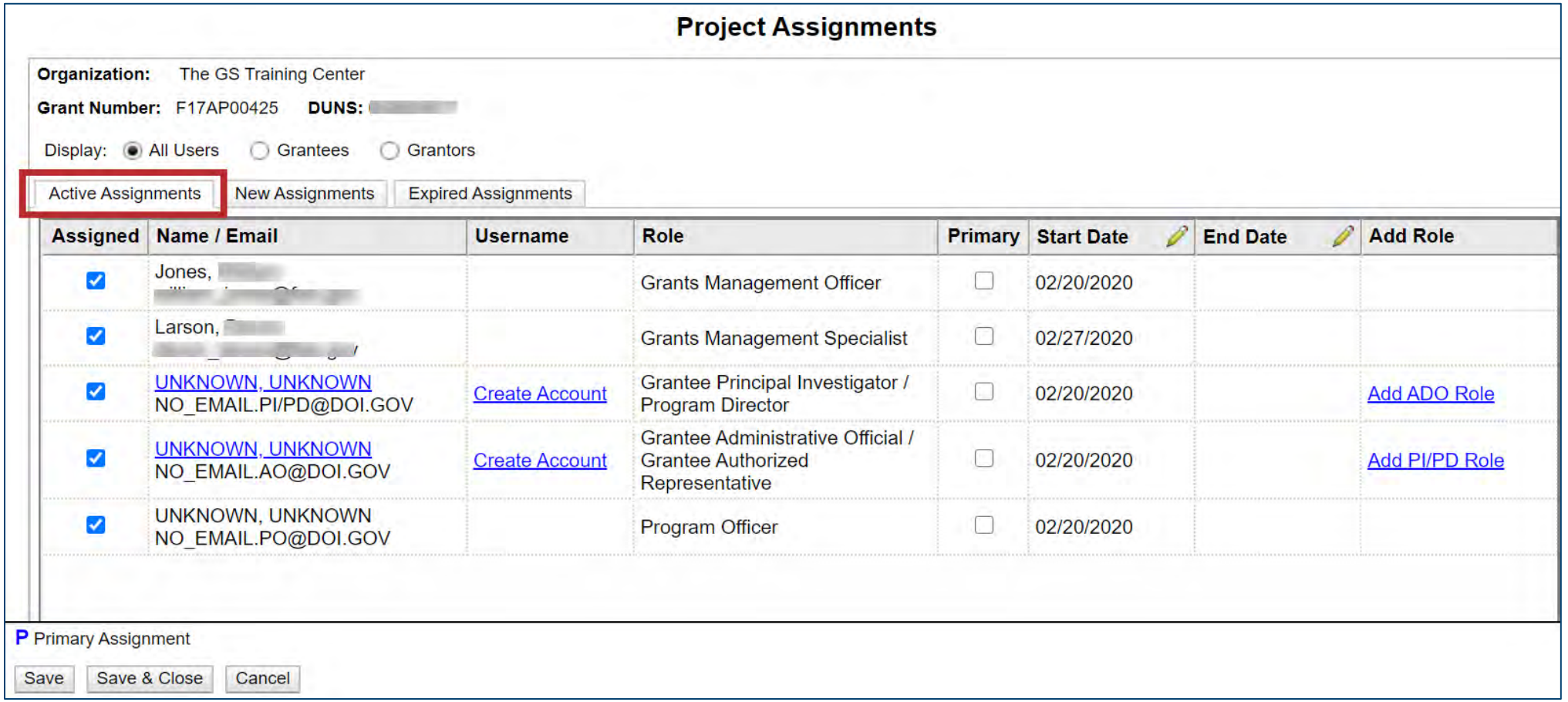
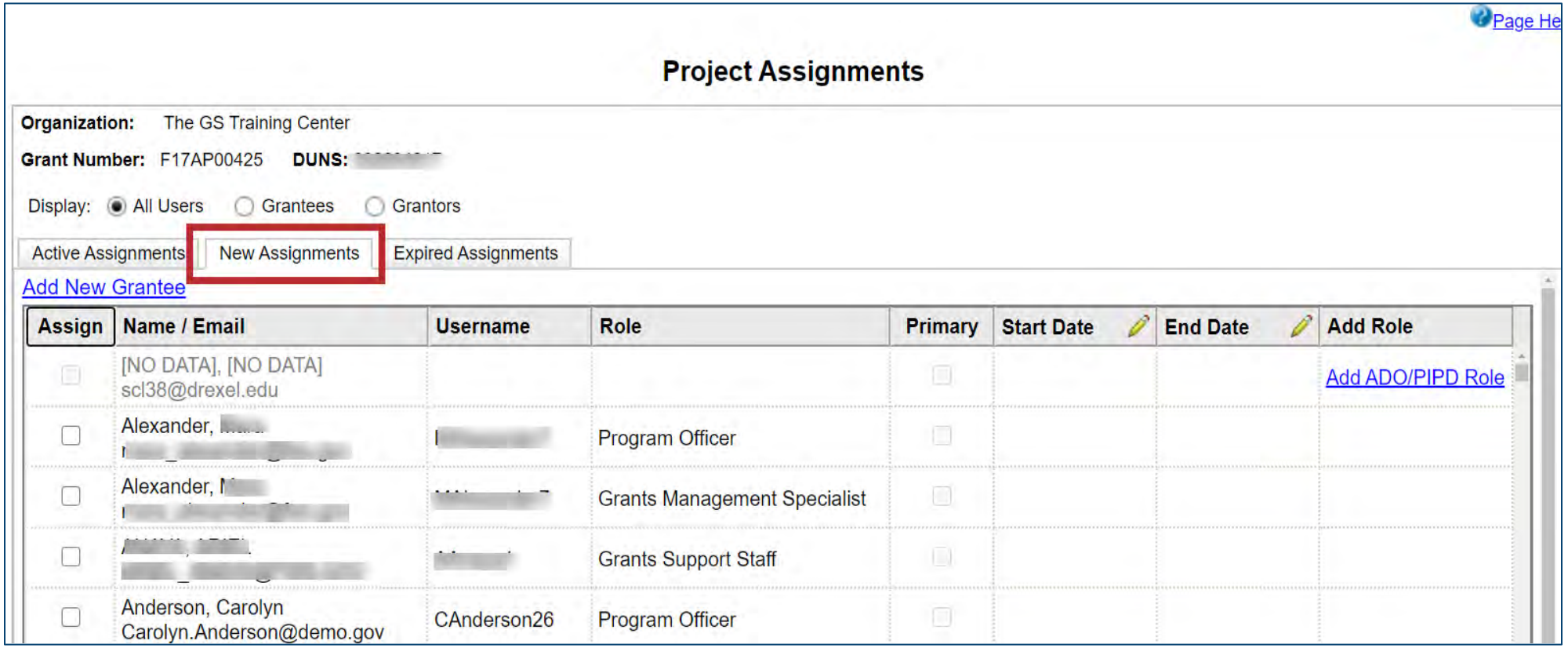
Project Assignment Screen – Active Assignments Tab

- Active Assignments tab – Grantors and Recipients already assigned to a project



Project Assignment Screen – New Assignments Tab

- New Assignments tab – All users available for assignment to a project display under the New Assignments tab



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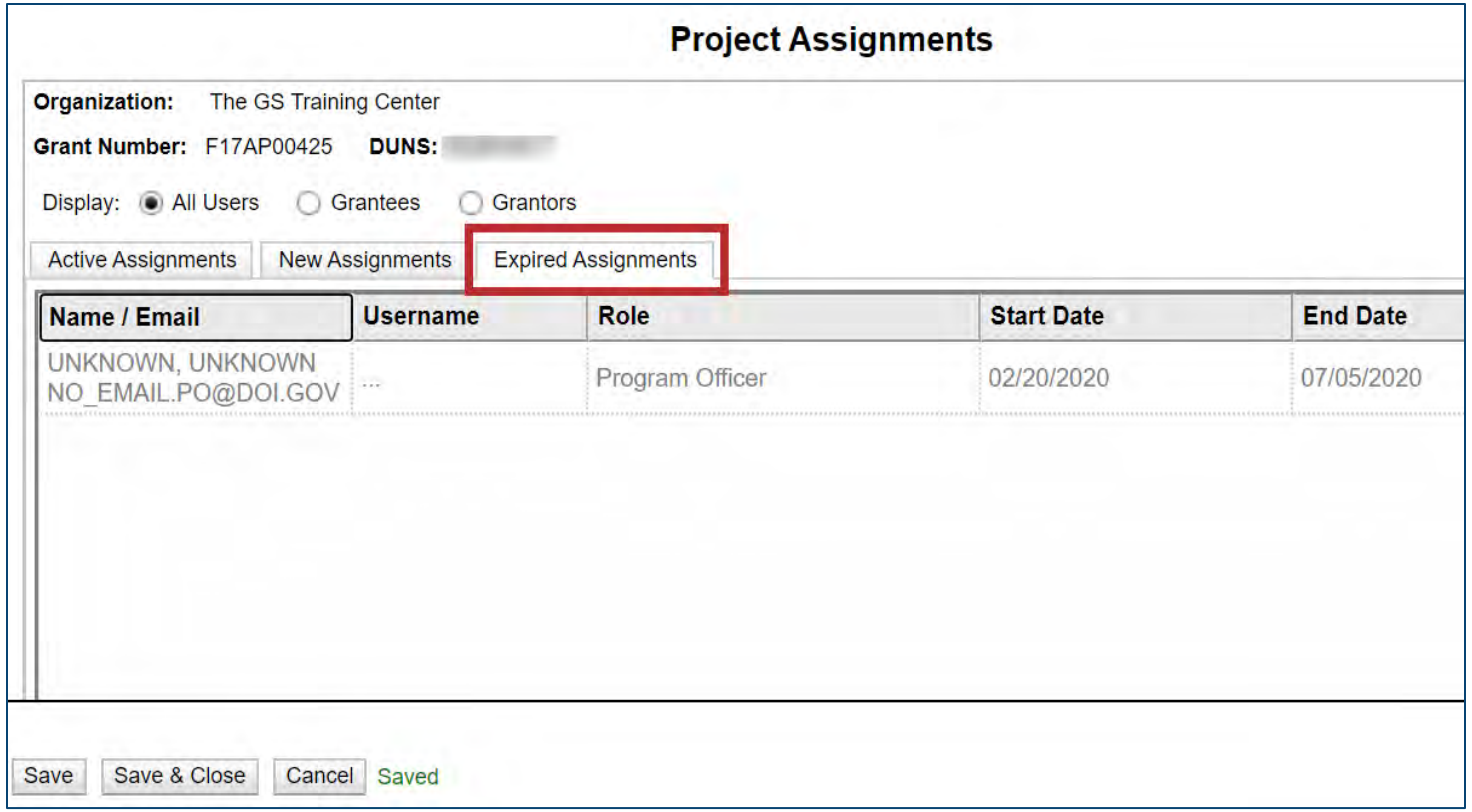
Project Assignment Screen – Expired Assignments Tab

- Expired Assignments tab – View users that were previously assigned to a project but who no longer have an active assignment



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Project Assignments Screen

- Additional features:
  - Display by All Users, Grantees, or Grantors
  - Utilize Start Date and End Dates set the timeframe per project assignment

Note: Users can use the CTRL-F shortcut to search through the Project Assignments list without scrolling through the entire list.

Manage Project Assignments for Multiple Awards

Bulk Assignments

Manage Project Assignments for Multiple Awards

- Use the Bulk Project Assignments feature to make assignments for multiple awards from the same Program Service Office and Grant Service Office at once
  - A user cannot be assigned as primary using the Bulk Project Assignments feature
- Bulk Project Assignments allow users to:
  - Assign Staff – Users can assign multiple users with the same grant program and service office
  - Unassign Staff – Users can unassign multiple users with the same grant program and service office
  - Replace Staff – Users can replace one grantor with another

Note: When assigning, unassigning, or replacing staff, users should revisit the primary assignments for the grant program

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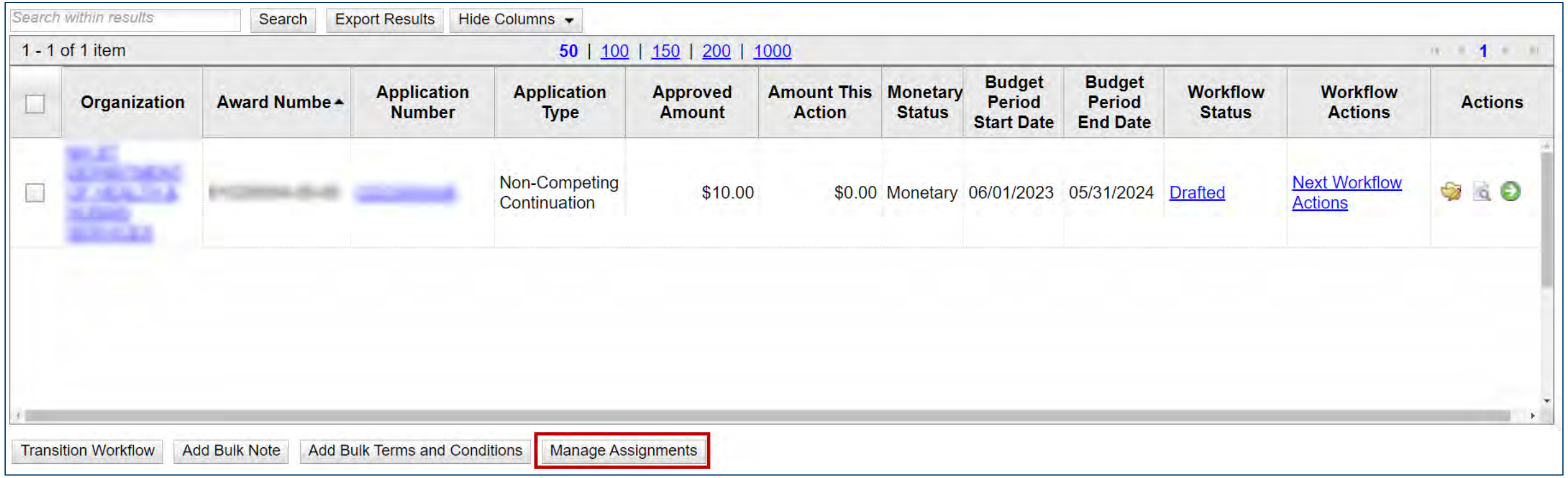
Manage Project Assignments for Multiple Awards

- Bulk Project Assignments are made for applications and awards from the following screens:
  - Application Receipt and Logging
  - Application Recommendation
  - Award Processing
  - Grants List

Note: Project Assignments cannot be modified once the Draft Notice of Award is in the Review status. Once the award is issued, assignments may be changed.

Manage Project Assignments for Multiple Awards

- To make multiple Project Assignments for applications and awards, perform an Advanced Search first. The Manage Assignments button shows below the Results table



Note: The Bulk Assignment functionality is only available if all selected Projects have the same Grant Program and Grant Service Office.

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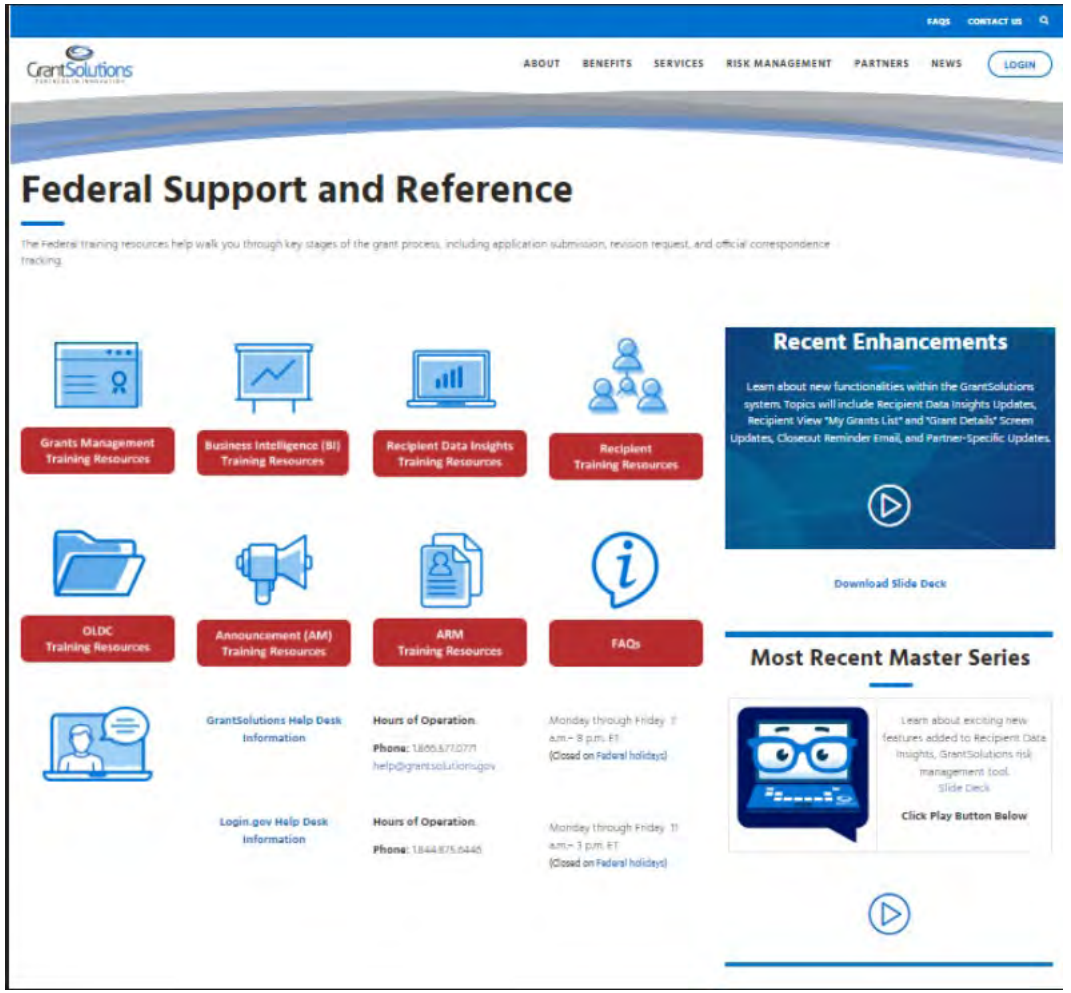
Resources & Post Session Follow -Up

- To access the Grantor training site from within GrantSolutions
  1. Click the Help/Support hyperlink from the main menu
  2. Click Documentation. You will land on the Federal Support and Reference page
- On the Federal Support and Reference page, you can access the:
  - Recordings and slides from the most recent Master Series
  - Supporting document for this session: Project Assignments Guide



Note: The recording will be sent to all attendees following this session.

Help Desk Support

- 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
  - **Phone:** 866-577-0771

Questions?

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Thanks for attending!