Federal User Account Request Form

Please use this form to request the following GrantSolutions Federal user account actions:

Create New User Account

The new user's Supervisor or Authorized Partner/Agency Official must make all account requests.
1. The user must complete and sign the Federal User Account Request Form (Form 2)
2. The user who will be receiving access must:
    a. Sign and date the Rules of Behavior (Form 1)
    b. Provide Government HSPD-12 Identification Card (PIV) Number

Create Only a New Recipient Data Insights (RDI) User Account

1. Sign and date the Rules of Behavior) (Form 1)
2. On the Federal User Account Request Form (Form 2): select New Account, enter Partner/Agency, check Recipient Data Insights (RDI) under GrantSolutions Modules, and then have supervisor sign and submit the form.

Update an Existing GrantSolutions User Account

Should any information regarding an existing Federal user account change, please select "Request Type: Account Change" and complete the Federal User Account Request Form (Form 2) in its entirety. Changes to existing accounts may include:
- Change a user's role (and reason for the change)
- Update a user or user's Supervisor/Authorizing Official's contact information

Close Existing User Account

Should a user's account need to be closed and no longer active, the user's Supervisor or Authorized Official must select "Request Type: Account Closure," sign the bottom of the Federal User Account Request Form (Form 1), and email it to
help@grantsolutions.gov.

Submission of the User Account Request Form

The Supervisor or Authorized Partner/Agency Official must request and authorize account changes (role changes, account closures, etc.). The GrantSolutions Support Center will verify all account requests as needed.

Restricting a User's Access

Any restriction to a user's existing access rights (privileges) must be defined below. This is usually done when restricting access to certain grant programs is required. In some cases, this can be done on a grant by grant basis. Please describe any special situations below or contact the GrantSolutions Support Center for help.

Submitting Requests

An official signature is required on these forms prior to their submission for action. Completed Federal User Account Request Forms with submitter contact information may be scanned and submitted electronically with the GrantSolutions Support Center by email or fax:
- Email: help@grantsolutions.gov
- Fax: (703) 288-5390

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Account information will be sent to the new (or changed) user's email address provided. Upon initial login, the user will be required to change the system-assigned temporary password.

If you have any questions, please contact the GrantSolutions Support Center at help@grantsolutions.gov or toll-free at (866) 577-0771.

GrantSolutions Functional Access Role Definitions

Please note the following definitions of each Role Type listed in Part 2 of the Federal User Account Request Form:

Grants Management Officer: The Grants Management Officer creates and posts announcements and application kits/templates; manages receipt of applications; performs eligibility and business reviews; creates budgets and draft NGA; manages Post-Award Amendment actions including prior approval memos; manages grant applications and records; generates form letters; and manages CLO and TAGGS data exports.

Grants Quality Control Manager: The Grants Quality Control Manager reports to the Grants Management Officer and is responsible for quality control administration of grant and reporting actions. This role can perform many of the same tasks as a Grants Management Specialist.

Grants Management Specialist: The Grants Management Specialist creates announcements and application kits/templates; manages receipt of applications; performs eligibility and business reviews; creates budgets and draft NGA; manages Post-Award Amendment actions including prior approval memos; manages grant applications and records; and generates form letters.

Grants Support Staff: The Grants Support Staff manages receipt of applications; performs eligibility; manages grant applications and records; and generates form letters.

Administrative Director: The Administrative Director is responsible for administrative oversight of contracts and grant programs, pre- and post-award reviews, and financial administration.

Program Office Director: The Program Office Director manages Project Officers and Program Coordinators and can perform the same responsibilities as a Project Officer or Program Coordinator. Additionally, the Program Office Director reviews and approves funding memos for pre-award applications as well as prior approval memos for post-award amendments. The Program Office Director has access to applications and grant records.

Program Authorizing Official: The Program Authorizing Official reviews and approves funding memos for pre-award applications as well as prior approval memos for post-award amendments. The Program Authorizing Official has access to applications and grant records.

Government Affairs Official: The Government Affairs Official signs off on all awards prior to final completion of the award.

Deputy Authorizing Official: The Deputy Authorizing Official is a role nearly equivalent to a normal Authorizing Official, however, the Deputy Authorizing Official is a level below the Authorizing Official in the hierarchy of roles. The Authorizing Official may delegate the approving authority to the Deputy Authorizing Official. A Deputy Authorizing Official may be assigned to a Program Headquarters Office or a Program Service Office.

Financial Management Officer: The Financial Management Officer creates and issues Advices of Allowance, ensures sufficient funds are available in Accounting, and approves post-award actions that include new funding.

Program Budget Officer: The Program Budget Officer is assigned to the Program Service Office of a Grantor who is responsible for the first award approval workflow. The Program Budget Officer is now available in the funding memo workflow if the layer is turned on.

Regional Program Consultant: The Regional Program Consultant is responsible for the oversight of one or more aspects of a program. This role is responsible for the oversight of activities performed by Program Coordinators and Program Officers assigned to manage the program's grant projects.

Program Coordinator: The Program Coordinator manages Project Officers. The Program Coordinator has the same responsibilities as the Project Officer and serves as a higher-level approval in the pre-award funding memo and post-award prior approval memo workflow.

Program Officer: The Program Officer is a Federal program staff person who is responsible for managing and monitoring the progress of one or more Grantees. The Program Officer is the Grantee's primary point of contact regarding the submission of status reports, such as semi-annual progress reports, etc.

Program Support Staff: The Program Support Staff have access to applications and grant records.

FPAR Coordinator: The Family Planning Annual Report (FPAR) Coordinator is the Office of Family Planning (OFP) representative who manages and validates the FPAR submission.

Research Director: The Research Director researches grant program-specific roles and manages Project Officers. The Research Director has the same responsibilities as the Project Officer and serves as a higher-level approval in the pre-award funding memo and post-award prior approval memo workflow.

Program Data Analyst: The Program Data Analyst is responsible for reviewing and analyzing grant performance. This role is not involved in the grant review process.

C/O Grants Officer: The Central Office Grants Officer reviews all grant information from the Central Office Grants Specialists. Central Office Grants Officers have the authority to review and approve the grant information of a specific program.

Grant Administrator: The Grant Administrator is the person responsible for assigning roles to staff members working with a specific program or grant. The Grant Administrator may also create new users for their organization and is assigned all roles available to Non-Federal customers.

C/O Specialist: The C/O Specialist receives Recommendations from the Regional Grants Officers and prepares the grant for the Central Office Grants Officer.

Data Entry Person: The Data Entry Person is responsible for entering grant report data into OLDC. The Data Entry Person is able to create and edit grant reports by default. Additional roles may be given, including Certify, Submit, and Unsubmit.

R/O Grants Officer: The R/O Grants Officer has the authority to review and approve the grant information of a specific Grantee within a particular region.

Authorized Official: The Authorized Official is directly involved in the processing of the grant. This might be a Financial Officer in charge of budgeting the grant or a member of an audit team. An Authorized Official has view-only and Certify roles by default. Additional roles such as Submit may be assigned to the Authorized Official.

R/O Specialist: The R/O Specialist is the authority responsible for processing the grant information of a specific Grantee within a particular region.

Grant Director: The Grant Director is the Manager of the grant recipient. The default roles are View-only and Certify. The Grant Director may be given other available permissions if required.

View/Read Only: View/Read Only can read and print report forms but cannot perform any action, such as data entry.

Lead Author: The Lead Author is responsible for drafting and revising Funding Opportunity Announcements (FOA). Lead Authors exist within a Program Office and can be Federal or Contract staff.

Certifying Official: The Certifying Official reviews the FOA content on behalf of the Program Office and can provide approval or disapproval.

Program Official: The Program Official reviews the FOA content on behalf of the Program Office and can provide approval or disapproval.

FOA Analyst: The FOA Analyst reviews the FOA content on behalf of the Grants Office and can provide approval or disapproval.

FOA Director: The FOA Director reviews the FOA content on behalf of the Grants Office as the highest level official and can provide approval or disapproval.

Reviewer: The Reviewer can only review and provide comments to the Lead Author on behalf of the Review Office.

FOA Approver: The FOA Approver reviews the FOA content on behalf of a specific office or organization and can provide approval or disapproval.

FOA Publisher: The FOA Publisher can only perform publication duties.

Queue Manager: The Queue Manager manages and reviews the Forecast information in the queue and publishes the Forecast to Grants.gov.

AM System Admin: The Announcement Module (AM) System Admin can configure/manage system configurations, such as FOA templates.

AM Read Only: The "AM Read Only" role can view all AM data (defined as "read only" access) but cannot perform any action, such as perform data entry functions.

Federal Project Officers: Federal Project Officers are responsible for monitoring the risk levels of grant projects and awards in the Grant Monitoring Service.

Regional Managers: Managers at the regional or headquarters level who are responsible for managing Federal Project Officers.

Rules of Behavior (Form 1)

As a user granted Federal staff authority, I agree to abide by the following:

- I will not disclose data from the GrantSolutions system to any unauthorized users.
- I will not make any unencrypted electronic copies of data from the GrantSolutions system.
- I will take all reasonable steps to ensure I do not violate the privacy and confidentiality of data from the GrantSolutions systems as per the Privacy Act of 1974.
- I will ensure the proper disposal of data (in any format) and printed reports.
- I will only access and use the GrantSolutions system to the extent that my duties require such access and use.
- I will immediately report suspected inappropriate or malicious use of the GrantSolutions system to the GrantSolutions Help Desk at help@grantsolutions.gov.
- I will immediately notify the GrantSolutions Help Desk of any account changes, including the need to close my account when my employment is terminated and when changes in my job duties necessitate the need for access changes to be made.

User's Name (Printed) _____

User's Signature _____ Date _____

Government HSPD-12 Identification Card (PIV) Number _____

User's Federal Email Address: _____

Authorized Official's Name: _____

Title: _____

Federal Official's Email Address: _____

Authorized Official's Signature: _____

I verify that _____ has an active and currently valid Government HSPD-12 Identification Card (PIV).

Federal User Account Request Form (Form 2)

Request Type: New Account   Account Change   Account Closure

Existing Username: **Partner/Agency/Department:**

Division/Branch/Program Office/or Grant Program:

GrantSolutions Services and Role Type (select all that are needed)

Announcement Service (AM)

Application Review Service (ARM)

Audit Resolution Tracking and Monitoring System (ARTMS)

Financial Administration for the HIDTA (FAH)

Grants Management Service (GMM)

Grants Monitoring

Mandatory Grants Service (MGM)

On-Line Data Collections (OLDC)

Project Assessment

Property Tracking and Management System (PTMS)

Reviewer Recruitment Service (RRM)

Recipient Data Insights (RDI)

GMM Role Type (select all that are needed)

Grants Management Officer	Program Authorizing Official	Program Coordinator
Grants Quality Control Manager	Government Affairs Official	Program Officer
Grants Management Specialist	Deputy Authorizing Official	Program Support Staff
Grants Support Staff	Financial Management Officer	FPAR Coordinator
Administrative Director	Program Budget Officer	Research Director
Program Office Director	Regional Program Consultant	Program Data Analyst

Additional Service Role Type (select only one for each Service)

OLDC	AM	Grants Monitoring	Financial Administration for the HIDTA (FAH)
C/O Grants Officer	Lead Author	Federal Project Officer	HIDTA Financial Manager
Grant Administrator	Certifying Official	Regional Manager	HIDTA Director ONDCP
C/O Specialist	Program Official	Grants Management Officer	Program Officer
Data Entry Person	FOA Analyst	Read Only	ONDCP OPB
R/O Grants Officer	FOA Director		Audit Contractor
Authorized Official	Reviewer		ONDCP National Director
R/O Specialist	FOA Approver		Read Only
Grant Director	FOA Publisher		
View Only	Queue Manger		
	System Admin		
	Read Only		

Limit User Access to Specified Grant Programs:

(use additional sheets if necessary)

User First Name: _____ **User Last Name:** _____ **M.I.** _____

Title: _____

Organization Name: _____

Organization Address: _____

City: _____ **State:** _____ **Zip:** _____

Phone: _____

Email: _____

Assistive Technology – Assistive Technology, such as JAWS, is used for visual impairment.

The user uses a Visual Impairment (screen reader/JAWS) Assistive Technology.

Authorized Official Name: _____ **Title:** _____

Authorized Official Signature: _____ **Date:** _____

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