

Quick Sheet: Application Notes for Recipients

Audience: Recipients

PURPOSE

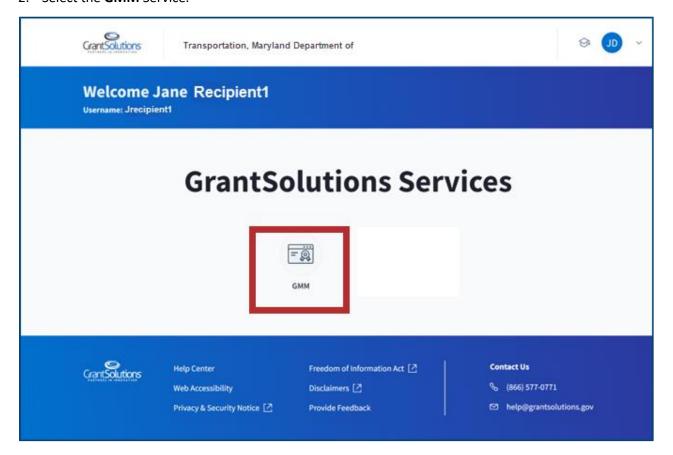
Application Notes are used to correspond with Federal staff and attach necessary documents to application records in GrantSolutions Grants Management Services (GMM). Notes are saved with the application and grant records for historical and tracking purposes.

To add an Application Note:

1. Log into the GrantSolutions GMM through Login.gov (Login Instructions).

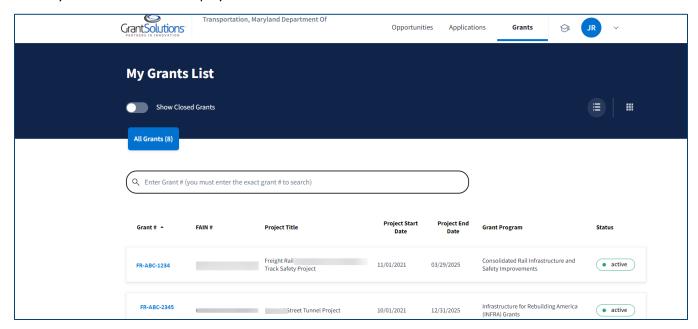
The GrantSolutions "Home Page" displays.

2. Select the GMM Service.



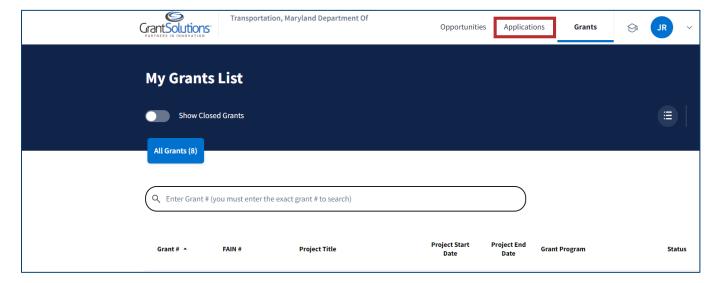


The "My Grants List" screen displays.



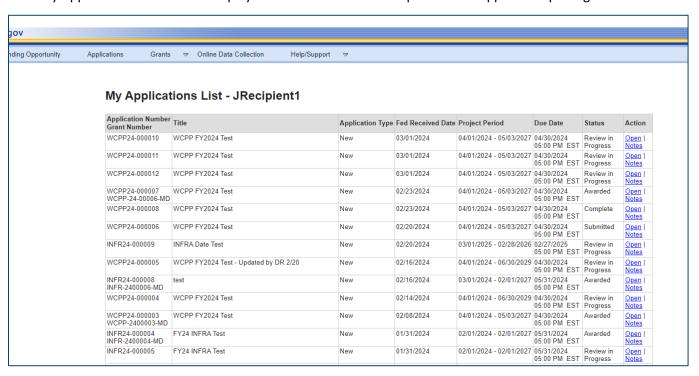
Note: If the first screen you see when launching GMM is the "My Applications List," please go to **Step 4**. The "My Applications List" displays as the GrantSolutions landing page for some users until the Grant Agreement/Notice of Award is completed in GrantSolutions.

3. From the menu bar, select **Applications**.





The "My Applications List" screen displays. Each row in the table represents an application package.

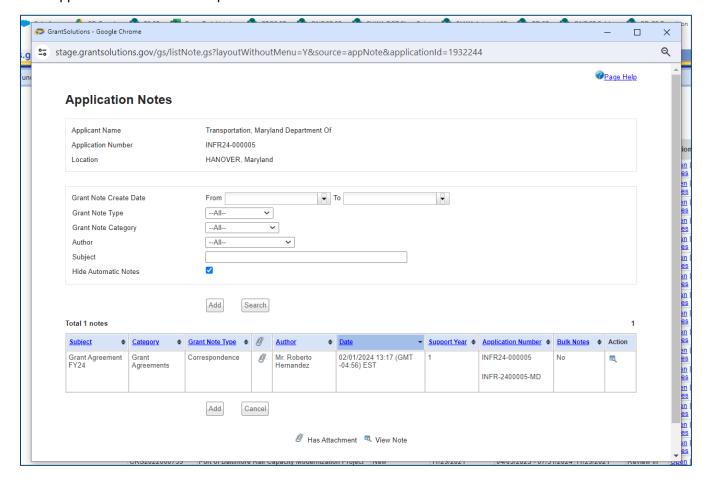


4. In the table below, locate the desired application title and select the **Note** hyperlink from the Action column.

	WOLL 24 000011	WOLL 1 12024 1030	IVO	03/01/2024	04/01/2024 03/03/2021	05 00 DM FOT	D.	Open I
						05:00 PM EST		Notes
	WCPP24-000012	WCPP FY2024 Test	New	03/01/2024	04/01/2024 - 05/03/2027	04/30/2024 05:00 PM EST	Review in Progress	Open Notes
	WCPP24-000007 WCPP-24-00006-MD	WCPP FY2024 Test	New	02/23/2024	04/01/2024 - 05/03/2027	04/30/2024 05:00 PM EST	Awarded	Open Notes
	WCPP24-000008	WCPP FY2024 Test	New	02/23/2024	04/01/2024 - 05/03/2027	04/30/2024 05:00 PM EST	Complete	Open Notes
	WCPP24-000006	WCPP FY2024 Test	New	02/20/2024	04/01/2024 - 05/03/2027	04/30/2024 05:00 PM EST	Submitted	Open Notes
	INFR24-000009	INFRA Date Test	New	02/20/2024	03/01/2025 - 02/28/2026		Review in Progress	Open I Notes
	WCPP24-000005	WCPP FY2024 Test - Updated by DR 2/20	New	02/16/2024	04/01/2024 - 06/30/2029		Review in Progress	Open Notes
	INFR24-000008 INFR-2400006-MD	test	New	02/16/2024	03/01/2024 - 02/01/2027	05/31/2024 05:00 PM EST	Awarded	Open Notes
	WCPP24-000004	WCPP FY2024 Test	New	02/14/2024	04/01/2024 - 06/30/2029	04/30/2024 05:00 PM EST	Review in Progress	Open I Notes
	WCPP24-000003 WCPP-2400003-MD	WCPP FY2024 Test	New	02/08/2024	04/01/2024 - 05/03/2027	04/30/2024 05:00 PM EST	Awarded	Open I Notes
	INFR24-000004 INFR-2400004-MD	FY24 INFRA Test	New	01/31/2024	02/01/2024 - 02/01/2027	05/31/2024 05:00 PM EST	Awarded	Open Notes
	INFR24-000005	FY24 INFRA Test	New	01/31/2024	02/01/2024 - 02/01/2027	05/31/2024 05:00 PM EST	Review in Progress	Onen I Notes
	INFR24-000006	FY24 INFRA Test	New	01/31/2024	02/01/2024 - 02/01/2027	05/31/2024 05:00 PM EST	Review in Progress	Open Notes
		2022 and 2023 PROTECT NOFO	New	08/07/2023	09/30/2023 - 09/30/2025		Review in Progress	Open Notes



The "Application Notes" screen opens in a new window.

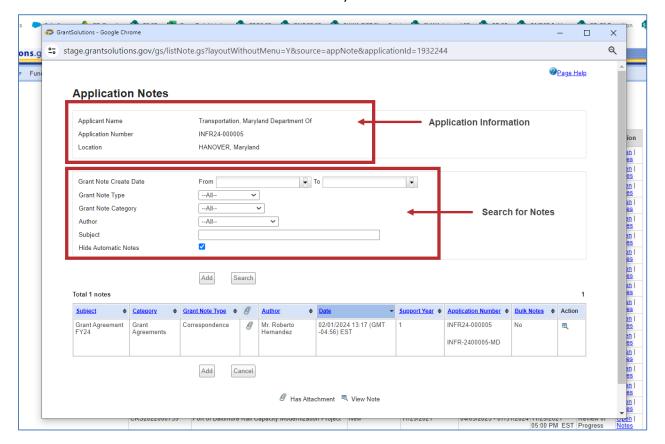




The top portion of the screen contains the Application information.

The middle section contains search fields that may be used to locate specific Application Notes. The search fields are populated from the previously added notes. The search fields are:

- Grant Note Create Date: "From" and "To" dates.
- Grant Note Type: Correspondence
- Grant Note Category: Pre-defined categories
- Author: Name of the user that created the Grant Note
- Subject: Grant Note subject
- Hide Automatic Notes: The checkbox is selected by default.

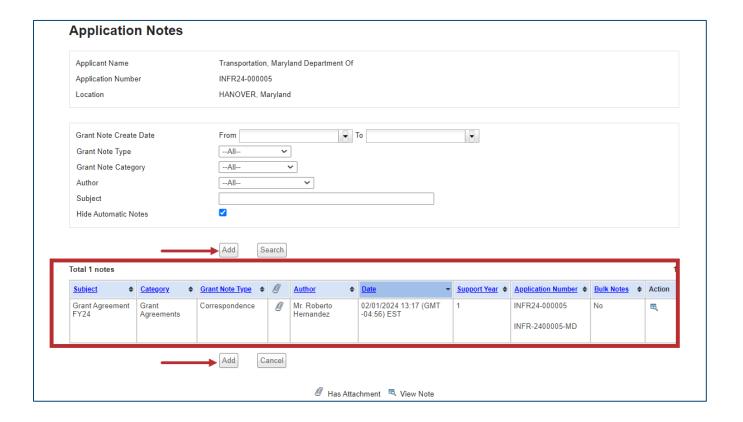




The bottom of the screen contains the notes created for this application, and the Add buttons which are used to make new notes. Each row in the table contains information added when a note was created. The columns are:

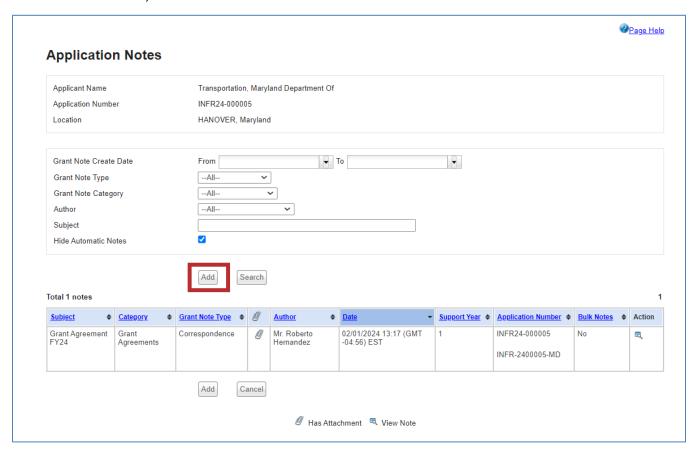
- Subject: Note subject
- Category: Assigned category
- Grant Note Type: Correspondence only
- Attachment icon: The paperclip icon displays when a file was uploaded to a note.
- Author: The name of the person that added the note.
- Date: The date the note was added
- Support year: The Budget Period sequence number within the Grant Project. For new Grant Projects this will start at 1 and increment

- for each non-competing or competing budget period. For Partners where the Budget Period and the Project Period match, this will always be 1. This does not represent an actual year.
- Application Number: The automatically generated application number associated with the note.
- Bulk Notes: If the Federal staff added the same note to more than one application simultaneously, 'Yes' will display.
- Action: The View Note icon

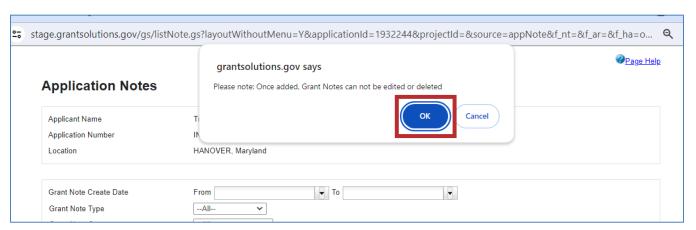




5. To add a new note, scroll towards the bottom of the window and click the **Add** button.

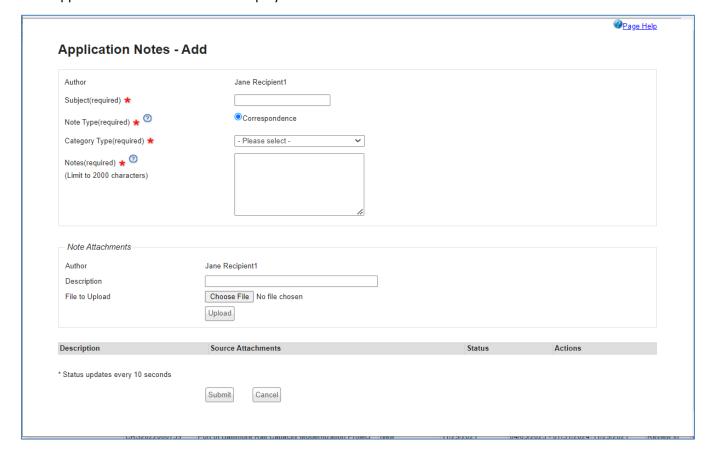


6. The message "Please note: Once added, Grant Notes cannot be edited or deleted" displays. Select the **OK** button.



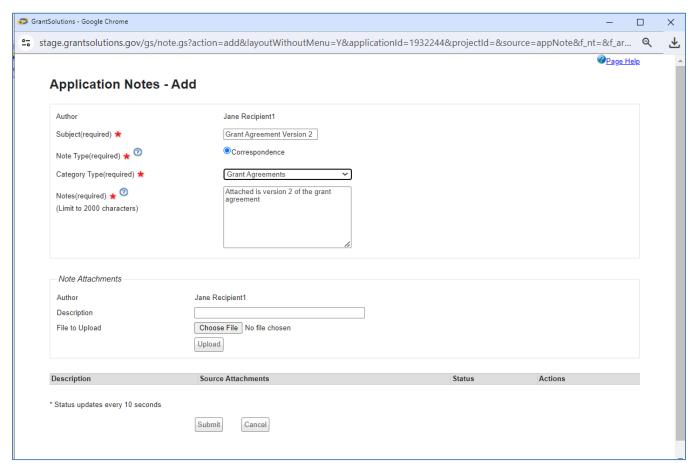


The "Application Notes-Add" screen displays.



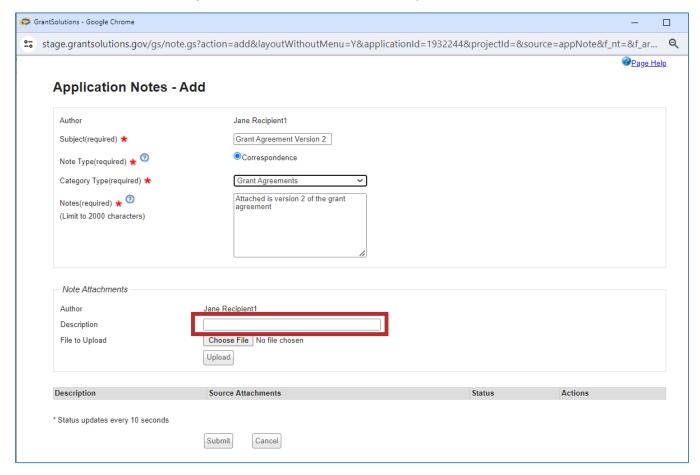


- 7. Enter information in the required fields indicated by a red asterisk.
 - a. *Subject*: Enter the subject of the note. Conform to naming conventions provided by the Federal agency.
 - b. *Note Type*: Correspondence is the only option and is automatically selected.
 - c. Category Type: Select from the pre-set list of categories as directed by the Federal agency.
 - d. Notes: Enter the note text (limit of 2000 characters)



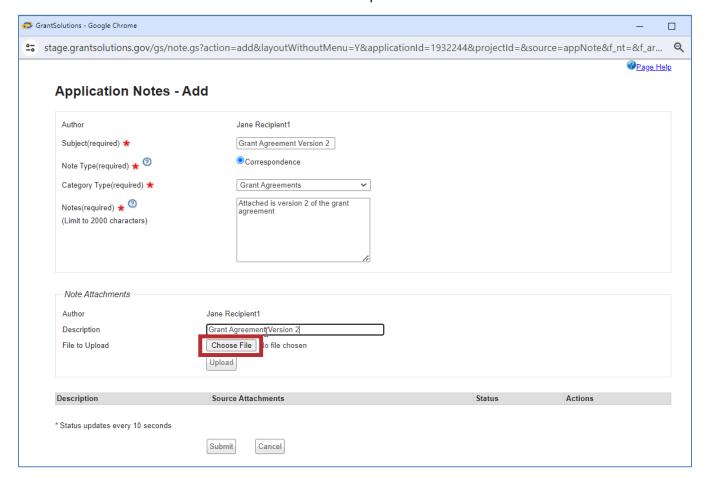


- 8. If desired, attach one or more files to the note. Files must be added one at a time.
 - a. Enter a **text description** of the attachment in the *Description* field.



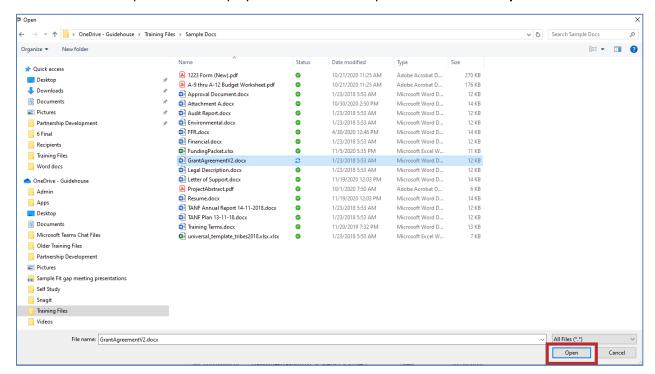


b. Click the **Choose File** button to select a file to upload to the note.

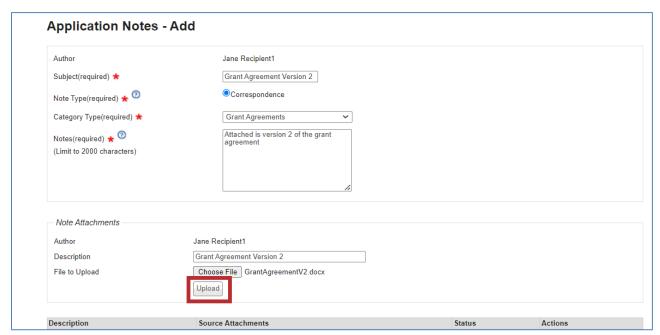




c. A File Open window displays. Locate the file to upload and select the Open button.

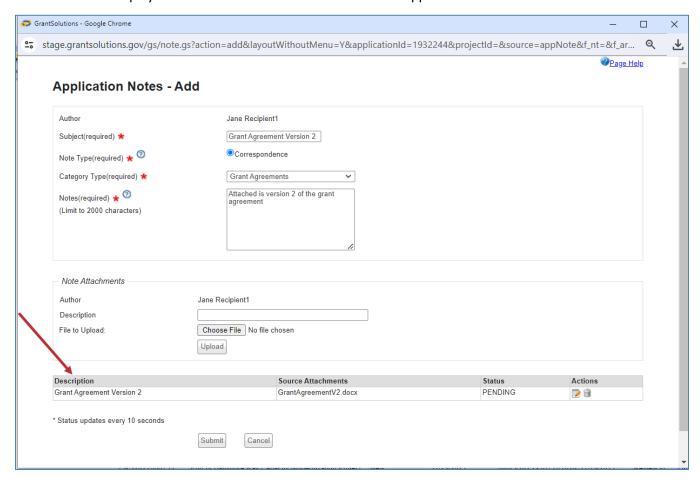


d. The selected file name displays to the right of the Choose File button. Select the **Upload** button.





The attachment displays in the table towards the bottom of the "Application Notes – Add" screen.

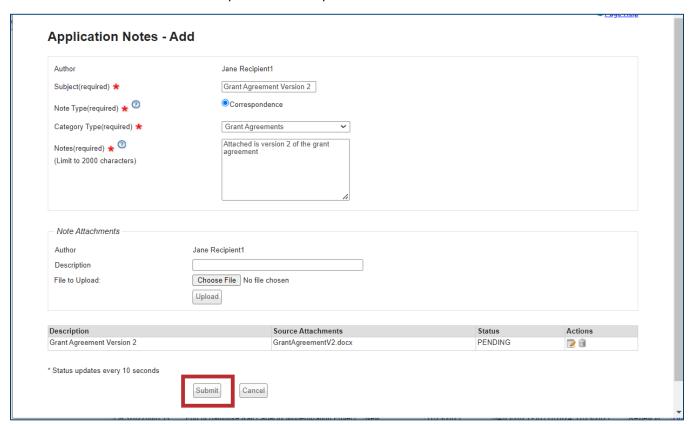


Notes:

- The attachment status is PENDING while GrantSolutions runs a virus scan.
- Add additional attachments to the note as needed.
- Delete the attachment by selecting the trash can icon from the Actions column.
- Edit the attachment description by selecting the notepad icon from the Actions column.



9. Select the **Submit** button to complete the correspondence note.



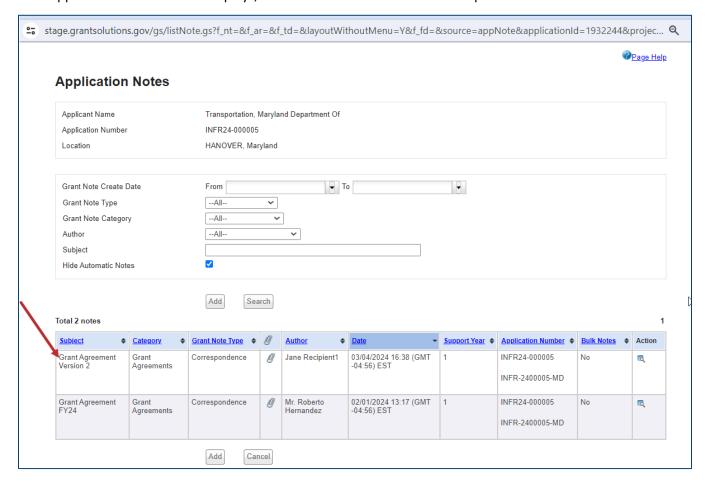
10. The message "Please note: Grant Notes cannot be edited or deleted" displays. Select the **OK** button.



Note: When you click Submit, if the agency has the notification setting on, an email notification will be sent to the corresponding Federal staff and other users from your organization.



The "Application Notes" screen displays, and the new note is added at the top of the table.





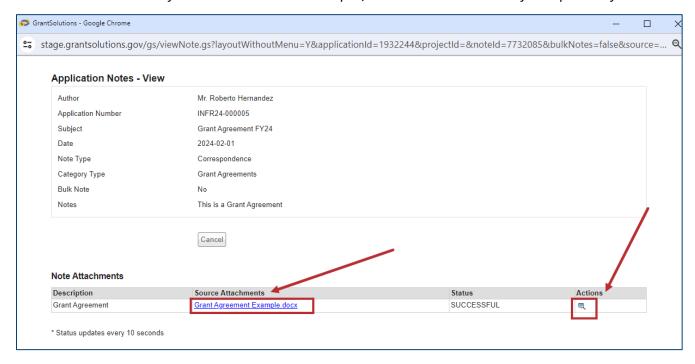
To view a note, select the **View** icon from the *Action* column.

								•	Page H		
Application	Notes										
Applicant Name		Transportation,	Transportation, Maryland Department Of								
Application Number		INFR24-000005	INFR24-000005								
Location	HANOVER, Ma	HANOVER, Maryland									
Grant Note Create [Date	From		. To	0						
Grant Note Type		AII	~								
Grant Note Categor	γ	AII	~								
Author	-	All		~							
Subject											
Hide Automatic Not	es	~			J						
		Add	arch								
Total 2 notes											
Subject •	Category		Ø	Author •	Date ▼	Support Year •	Application Number •	Bulk Notes 4	Action		
Grant Agreement	Grant	Correspondence	0	Jane Recipient1	03/04/2024 16:38 (GMT -04:56) EST	1	INFR24-000005	No	6		
Version 2	Agreements						INIED 2400005 155]		
							INFR-2400005-MD	_			
Grant Agreement	Grant	Correspondence	0	Mr. Roberto	02/01/2024 13:17 (GMT -04:56) EST	1	INFR24-000005	No	-		
FY24	Agreements			Hernandez			INFR-2400005-MD		-		
							1141 14-24-00003-WID				

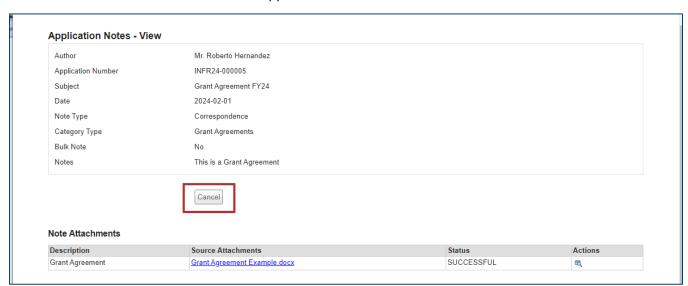


The "Application Notes - View" screen displays.

- Select the **hyperlink** from the Source Attachments column to open/download the original version of the uploaded file.
- Select the View icon from the Actions column to open/download a PDF version of the uploaded file.

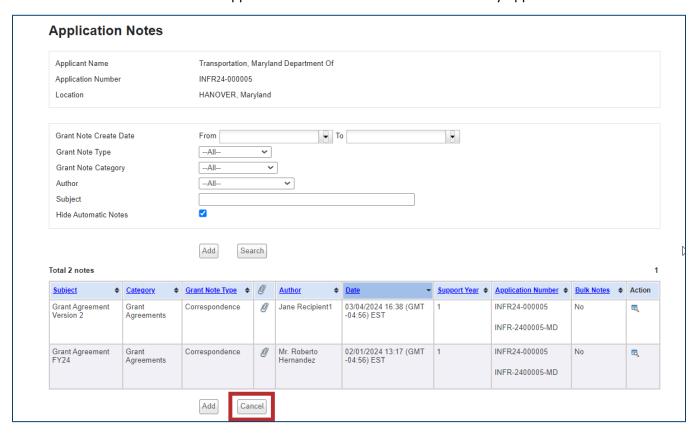


Select the Cancel button to return to the "Application Notes" screen.





Select the **Cancel** button from the "Application Notes" screen to return to the "My Applications List" screen.



The "My Applications List" screen displays.

