GrantSolutions℠
PARTNERS IN INNOVATION

COURSE CATALOG

Fiscal Year 2025

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WELCOME TO THE GRANTSOLUTIONS COURSE CATALOG

The GrantSolutions Course Catalog provides a list of GrantSolutions training courses.

Introduction

GrantSolutions offers in-person and virtual training to all GrantSolutions Partners and Recipients to support users learning how to use the system in addition to the information provided through the support and documentation link within the system. Individualized trainings or multiple courses can address how to use the system and address questions or technical needs. Partners can review the catalog and speak with their Partner Services Support Teams to request a training quote and to schedule training courses. The process of scheduling onboarding or steady state Partner training begins by selecting from the list of trainings provided in the course catalog.

Role-Based Trainings

GrantSolutions is a role-based system, meaning each user's account is configured to a role within the system that determines what they can view and the functions they can perform. To ensure that the appropriate information is reaching the right users at each Partner, GrantSolutions trainings are customized based on role.

The "GrantSolutions Course Catalog Roles" table outlines the role symbols included in the course catalog (refer to pages 4-5).

GrantSolutions Course Catalog Roles

Grantor Roles

GrantSolutions Grants Management Services (GMM) Roles		Online Data Collection (OLDC) Roles	
ALL	All GrantSolutions GMM Grantor Roles	**A**	Auditor
GMO	Grants Management Officer	**ROS**	(Regional Office) R/O Specialist
GMS	Grants Management Specialist	**ROO**	(Regional Office) R/O Grants/ Program Officer
GSS	Grant Support Staff	**COS**	(Central Office) C/O Specialist
GQC	Grants Quality Control Officer	**COO**	(Central Office) C/O Grants/ Program Officer
PO	Program Officer	**Grants Monitoring Roles**	
PC	Program Coordinator	**FPO**	Federal Program Officer
AD	Administrator Director	**FFPO**	Fiscal Federal Program Officer
PBO	Program Budget Officer	**BFPO**	Back-Up Federal Program Officer
OD	Program Office Director	**RM**	Regional Manager
PAO	Program Authorizing Official	**BRM**	Back-Up Regional Manager
DAO	Deputy Authorizing Official		
FMO	Financial Management Officer		
RD	Research Director		

GrantSolutions Course Catalog Roles

Recipient Roles

GMM Roles		OLDC Roles	
ADO	Authorizing Official/ Authorizing Representative	DEP	Data Entry Person
FO	Financial Officer	AO	Authorized Official
FSS	Financial Officer Support	GD	Grant Director
PI/PD	Program Director/Principal Investigator	GA	Grant Administrator
SS	Support Staff	VO	View-Only

How to Use the GrantSolutions Course Catalog

Key Information About the Course Catalog

This catalog includes the course title, description, roles of those who can attend the training, training type, recommended duration, a link to the "At-A-Glance" table in this catalog, and applicable notes. It also includes a link to the GrantSolutions Roles Definitions for Federal staff and Recipients, respectively, available on the GrantSolutions User Account Request Forms.

The **courses are listed in the order that an award is processed**. You can use this order to guide your decisions if more than one training course is required.

Training **can be requested on an ad hoc basis** for areas in which Partners feel dedicated instruction is needed.

Courses can be **configured to each Partner's specific needs**. This includes tailoring the course title, length, and topics to your workflow or business process.

The GrantSolutions roles listed under each course are <u>**all**</u> **GrantSolutions roles that can take the course across Partners**. This may differ across Partner agencies.

The terms "Grants Office" and "Program Office" refer specifically to **GrantSolutions' categorization of Grants and Program Offices**. This may differ from your actual role or office.

Each course is accompanied by **standard documentation and slide decks**.

Navigating the Course Catalog

Below is an example of how the catalog displays courses. Note: The color of the "course name" block will differ depending on the course type. Grantor Courses will be blue, Advanced Grantor Courses will be yellow, and Recipient Courses will be black.

Course Name

Grantor or Recipient Course

Recommended Length of Course

Course Notes

Back to At A Glance

Course Description

Example course description goes here!

GrantSolutions Roles

ALL

At-A-Glance

Grantor Courses

- Introduction to GrantSolutions Grants Management Services (GMM)

- Create and Post Announcements in GrantSolutions GMM

- New Competitive Application Processing (Program Office)

- New Competitive Application Processing (Grants Office)

- Non-Competing Continuation (NCC) Processing (Program Office)

- Non-Competing Continuation (NCC) Processing (Grants Office)

- Funding Memo Approvers

- New Award Processing (Grant Office)

- Award Approvers

- Amendment Actions (Program Office)

- Amendment Actions (Grants Office)

- Financial Management Officer (FMO) Actions

- Reporting

- GrantSolutions Ecosystem

- Online Data Collection (OLDC) (Grants and Program Office)

- Closeout Services

Advanced Grantor Courses

- Budget Worksheet

- Reverse Actions

- Common Questions and Resolutions

Recipient Courses

- Recipient Actions

- Non-Competing Continuation (NCC)

- Online Data Collection (Recipients)

Grantor Course Descriptions

Introduction to GrantSolutions Grants Management Services (GMM)

Grantor Course

2 hours

Recommended as a pre requisite for large groups; also available as a computer based training (CBT) for individual users

Back to At A Glance

Course Description

An introduction to GrantSolutions, which includes an overview of GrantSolutions Grants Management Services (GMM). Attendees will learn how to log into GrantSolutions and navigate the Home Page, Grants List, and Grant Details screens.*

GrantSolutions Roles

ALL

Course Description

An overview course that covers creating and posting announcements in GMM. Attendees will learn how to view/add grant and program enclosures, create an application kit, create and save an announcement, and post/un-post an announcement. *

GrantSolutions Roles

GMO	GMS	GSS	GQC

Create and Post Announcements in GrantSolutions GMM

Grantor Course

1.5 hours

Course is also available as a CBT for individual users

Back to At A Glance"

New Competitive Application Processing (Program Office)

Grantor Course

1.5 hours

Back to At A Glance

Course Description

This course covers how a Program Office system role can process new competing applications in GMM. Attendees will learn how to verify and view submitted applications, recommend funding decisions, and conduct actions related to the Funding Memo.

GrantSolutions Roles

PO	PC	AD	PBO
OD	PAO	DAO	RD

Grantor Course Descriptions

New Competitive Application Processing (Grants Office)

Grantor Course

2 hours

Back to At A Glance

Course Description

This course covers how a Grants Office system role can process new competing applications in GMM. Attendees will learn how applications come into the system, how to verify submitted applications, perform the Intake and Business Reviews, and add Project Assignments.

GrantSolutions Roles

| GMO | GMS | GSS | GQC |

Course Description

This course covers how a Program Office system role can process an NCC application in GMM. Attendees will define NCC, view a submitted application, conduct searches, select a recommended decision and amount, and conduct actions related to the Funding Memo.

GrantSolutions Roles

| PO | PC | AD | PBO |
| DAO | OD | PAO | RD |

Non Competing Continuation (NCC) Processing (Program Office)

Grantor Course

1.5 hours

Back to At A Glance"

Non Competing Continuation (NCC) Processing (Grants Office)

Grantor Course

2 hours

Back to At A Glance

Course Description

This course covers how a Grants Office system role processes an NCC application in GMM. Attendees will define NCC, create a NCC application kit, conduct searches, perform the business review, and prepare the Notice of Award (NOA).

GrantSolutions Roles

| GMO | GMS | GSS | GQC |

Grantor Course Descriptions

Funding Memo Approvers

Grantor Course

1.5 hours

Back to At A Glance

Course Description

This course covers each approver's steps to review and approve the Funding Memo. Attendees will learn how to review and approve the Funding Memo and reject to make changes and/or disapprove the Funding Memo.

GrantSolutions Roles

GMO	GMS	PO	PC	AD	PBO
OD	PAO	DAO	FMO	RD	

Course Description

This course covers the Grants Office system roles' steps to prepare and draft the NOA in GMM. Attendees will learn how to generate the draft NOA, access and conduct searches on the Awards Processing screen, prepare the draft NOA, and send draft NOA to GMO to begin the approval process.

GrantSolutions Roles

GMO	GMS

New Award Processing (Grants Office)

Grantor Course

2 hours

Back to At A Glance"

Award Approvers

Grantor Course

1.5 hours

Back to At A Glance

Course Description

This course covers each approver's steps to review and approve the draft NOA, as well as issue the award. Attendees will learn how to review and approve the NOA, as well as reject the NOA for changes.

GrantSolutions Roles

GMO	GQC	PO	PC	AD
PBO	OD	PAO	FMO	

Grantor Course Descriptions

Amendment Actions (Program Office)

Grantor Course

1.5 hours

Back to At A Glance

Course Description

This course covers how a Program Office system role processes an amendment application in GMM. Attendees will learn how to review an amendment application and perform Funding Memo actions/approvals.

GrantSolutions Roles

PO	PC	AD	PBO
OD	PAO	DAO	RD

Course Description

This course covers how a Grants Office system role processes an amendment application in GMM. Attendees will learn how to initiate or review a recipient submitted amendment application, Funding Memo actions (if applicable), and prepare the NOA for issuance.

GrantSolutions Roles

GMO	GMS	GSS	GQC

Amendment Actions (Grants Office)

Grantor Course

2 hours

Back to At A Glance"

Financial Management Officer (FMO) Actions

Grantor Course

1.5 hours

Back to At A Glance

Course Description

This course covers the steps FMO actions in GMM. Attendees will learn how to create, maintain, and delete financial accounts; add or withdraw funds from financial accounts; create single or multiple commitments; and approval processes.

GrantSolutions Roles

FMO

Grantor Course Descriptions

Reporting

Grantor Course

2 hours

Back to At A Glance

Course Description

This course provides Grantors with steps for managing the Federal Financial Report (FFR) and Performance Progress Report (PPR) in GMM. Attendees will learn how to set up the reporting cycle, access and search for reports, create a report on behalf of a Recipient Organization, view reports, and approve or reject submitted reports.

GrantSolutions Roles

| GMO | GMS | PO |

Course Description

This course provides an overview of the entire GrantSolutions ecosystem. Attendees will learn about each available GrantSolutions ecosystem of services. Examples include, but are not limited to, GMM, Recipient Data Insights, Business Intelligence, and Online Data Collection.

GrantSolutions Roles

| ALL |

GrantSolutions Ecosystem

Grantor Course

1.5 hours

Back to At A Glance"

Online Data Collection (OLDC) (Grants and Program Office)

Grantor Course

2 hours

Back to At A Glance

Course Description

This course covers how Grants and Program Office interact with the Online Data Collection system. Attendees will learn about job types, the two home page views, and the Grantor approval process. Attendees will also learn how to view existing permissions, access submitted reports, and submit reports on behalf of a Recipient Organization.

GrantSolutions Roles

| A | ROS | ROO | COS | COO |

Grantor Course Descriptions

Closeout Services

Grantor Course

2 hours

Back to At A Glance

Course Description

This course covers the Grants Office steps to close out an award. Attendees will learn how to approve or return a GMS-initiated batch, return a batch to the GMS for changes, reject a batch initiated by the GMS, and create a batch for processing. Attendees will also learn how a GMO closes out by project period, budget period, and document number.

GrantSolutions Roles

| GMO | GMS |

Course Description

This course provides an overview of the Grants Monitoring Service in GrantSolutions. Attendees will learn about how to monitor, oversee, and report on the progress and performance of grant awards and programs.

GrantSolutions Roles

| GMO | PO | FPO | FFPO |
| BFPO | RM | BRM |

Grants Monitoring

Grantor Course

1.5 hours

Back to At A Glance"

Advanced Grantor Course Descriptions

Budget Worksheet

Advanced Grantor Course

2 hours

Introduction version of the course is also available as a CBT for individual users

Back to "At-A-Glance"

Course Description

This course covers the GMM Budget Worksheet. Attendees will learn the purpose of the Budget Worksheet and how to navigate its features. Attendees will also learn how to modify the Budget Worksheet for New Competitive Awards and Amendments. *

GrantSolutions Roles

GMO	GMS	PO	PC	PBO
	OD	PAO	DAO	RD

Course Description

This course provides an overview on possible reverse actions in GrantSolutions. Attendees will learn how to return draft awards and applications to earlier stages in the process.

GrantSolutions Roles

ALL

Reverse Actions

Advanced Grantor Course

2 hours

Back to "At-A-Glance"

Common Questions and Resolutions

Advanced Grantor Course

2 hours

Back to "At-A-Glance"

Course Description

This course covers what to do when things do not go as planned during application and award processing. Attendees will learn applicable skills for troubleshooting common questions in GMM.

GrantSolutions Roles

ALL

Recipient Course Descriptions

Recipient Actions

Recipient Course

2 hours

Course is also available as a CBT for individual users

Back to At A Glance

Course Description

This course covers recipient actions in GMM. Attendees will learn how to request a GrantSolutions account, log into the system, access their roles and notifications, navigate the recipient view, accept an award, initiate an amendment, submit FFRs and PPRs, locate and apply for an announcement, edit a returned application, and view/create a note.*

GrantSolutions Roles

ADO	FO	FSS	PI/PD	SS

Course Description

This course covers Recipient actions related to NCCs in GMM. Attendees will learn how to initiate and make changes to NCC applications in GMM.

GrantSolutions Roles

ADO	FO	FSS	PI/PD	SS

Non Competing Continuation (NCC)

Recipient Course

1.5 hours

Back to At A Glance"

Online Data Collection (Recipients)

Recipient Course

1.5 hours

Back to At A Glance

Course Description

This course covers Recipient actions in the Online Data Collection (OLDC) system. Attendees will learn about job types, the two homepage views, and navigation. Attendees will also learn how to view, populate, and submit a report.

GrantSolutions Roles

DEP	AO	GD	GA	VO

Request a Training

To request training, please take the steps outlined in the graphic below.

01	02	03
You (Partner):	**GrantSolutions:**	**You & GrantSolutions:**
Contact your Partner Services Support Team to initiate planning. Speak with your Grants Office representative if you don't know who your Support Team members are.	GrantSolutions will develop a cost proposal for review and approval. Planning and scheduling training courses cannot begin until approval of your cost proposal is received.	Upon receipt of funding, GrantSolutions will coordinate training requirements. For scheduling purposes, please plan 3 to 4 weeks for delivery after funding is received.

Training Requirements

When coordinating training requirements (Step #3), please be prepared for your Partner Services Support Team to request the following information:

- Name(s) of the Training Course(s) from the GrantSolutions Course Catalog

- Intended Audience (e.g., GMO, GMS, FMO, Recipients, etc.)

- Number of Expected Attendees

- Training Delivery Tool (e.g., Adobe Connect, Microsoft Teams, Zoom, Webex, etc.)
    - Note: The default tool of the GrantSolutions Training Team is Adobe Connect. Please indicate if your agency requires the use of a different platform.

- Preferred Date(s) and Time(s) of Training(s)

- Partner Point of Contact Support (i.e., an individual from the Partner agency who will attend the trainings and provide Partner-specific context)

- Current Workflow Diagrams and Custom Documentation (if available)

- Additional Notes (e.g., Assistive Technology, such as JAWS, needed for visual impairment., etc.)

Access Computer-Based Training

GrantSolutions also offers computer-based training (CBTs) to all Partners and Recipients with GrantSolutions user accounts at no additional cost to the Partner or Recipient.

Why Should I Access GrantSolutions CBTs?

- CBT training is available at no-cost to all Partners and Recipients.

- Partners and Recipients can take CBTs at any time that is convenient to them and complete the lessons at their own pace.

- CBTs provide Partners and Recipients an opportunity to engage with guided software simulation, giving users a hands-on learning experience with the GrantSolutions system.

What GrantSolutions CBTs Are Available?

- Recipients have access to the Recipient Actions CBT. They also can access the following Recipient micro-learning CBT topics: Creating Grant Notes, Exploring Grant Details, and Managing Amendments.

- Partners have access to the following CBTs: Introduction to GrantSolutions, Creating and Posting Announcements, Budget Worksheet, Recipient Actions, and Business Intelligence. They can also access the following Recipient micro-learning topics: Creating Grant Notes, Exploring Grant Details, and Managing Amendments.

How Do I Access GrantSolutions CBTs?

1. Log into GrantSolutions.

2. From the GrantSolutions "Homepage", select the **Training Resources** (graduation cap icon) in the top righthand corner of the screen and select the **Interactive Training** option.
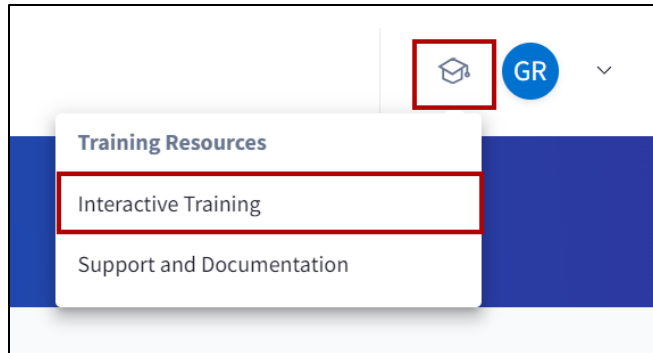
3. Select the CBT from the available Dashboard.
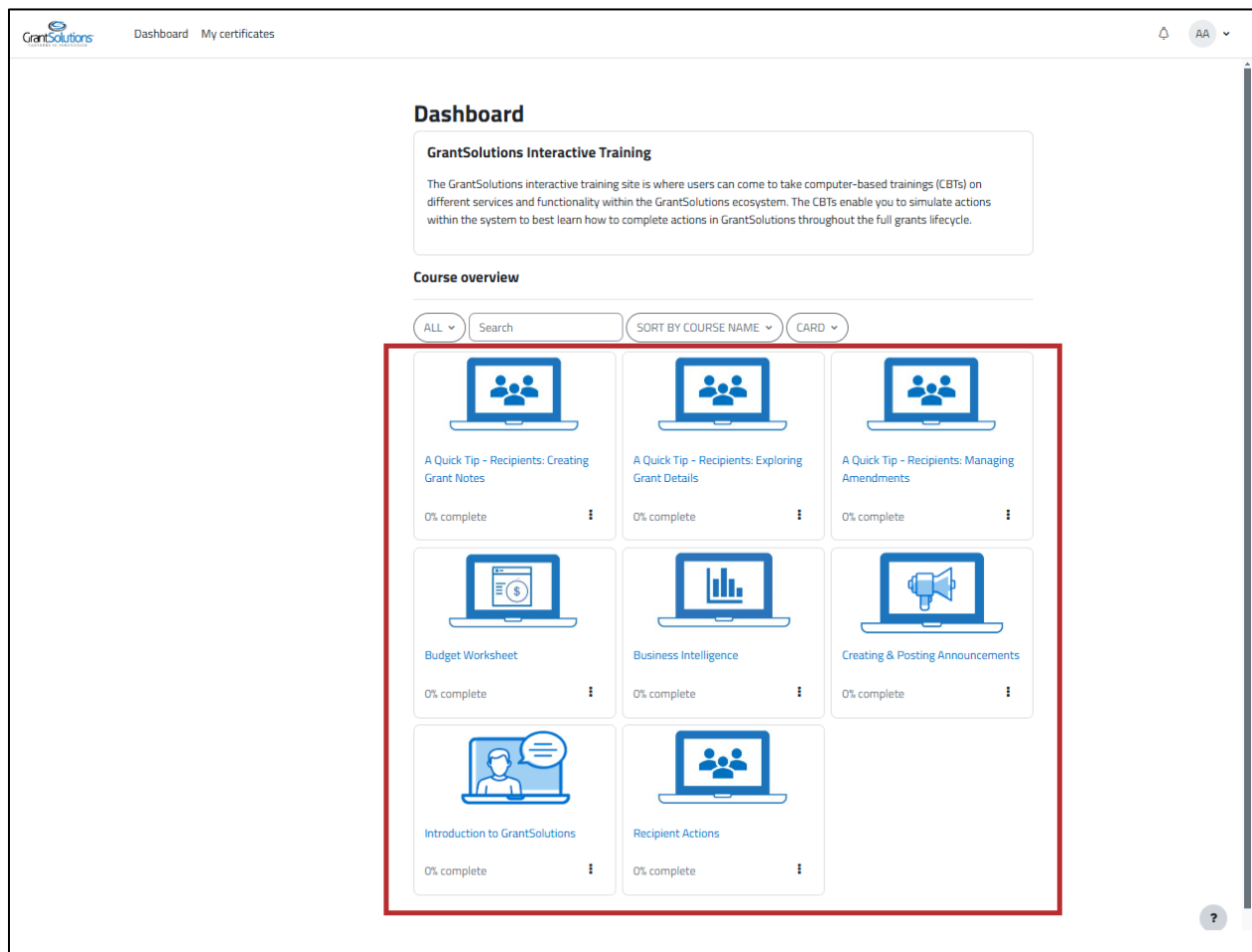
Appendix: Courses by GrantSolutions Role

The following table outlines all the courses available for each GrantSolutions role. Note: Each Partner's GrantSolutions business process determines which roles are included in each course.

| GMM Grantor Roles	
Role	**Available Courses**
All GrantSolutions Grantor Roles **ALL**	• Introduction to GrantSolutions Grants Management Services (GMM) • GrantSolutions Ecosystem • Reverse Actions (Advanced Course) • Common Questions and Resolutions (Advanced Course)
Grants Management Officer (GMO) **GMO**	• Create and Post Announcements in GrantSolutions GMM • New Competitive Application Processing (Grants Office) • Non-Competing Continuation (NCC) Processing (Grants Office) • Funding Memo Approvers • New Award Processing (Grants Office) • Award Approvers • Amendment Actions (Grants Office) • Reporting • Closeout Services • Budget Worksheet (Advanced Course) • Grants Monitoring
Grants Management Specialist (GMS) **GMS**	• Create and Post Announcements in GrantSolutions GMM • New Competitive Application Processing (Grants Office) • Non-Competing Continuation (NCC) Processing (Grants Office) • Funding Memo Approvers • New Award Processing (Grants Office) • Amendment Actions (Grants Office) • Reporting • Closeout Services • Budget Worksheet (Advanced Course)

GMM Grantor Roles	
Role	**Available Courses**
Grant Support Staff (GSS) GSS	• Create and Post Announcements in GrantSolutions GMM • New Competitive Application Processing (Grants Office) • Non-Competing Continuation (NCC) Processing (Grants Office) • Amendment Actions (Grants Office)
Grants Quality Control Officer (GQC) GQC	• Create and Post Announcements in GrantSolutions GMM • New Competitive Application Processing (Grants Office) • Non-Competing Continuation (NCC) Processing (Grants Office) • Award Approvers • Amendment Actions (Grants Office)
Program Officer (PO) PO	• New Competitive Application Processing (Program Office) • Non-Competing Continuation (NCC) Processing (Program Office) • Funding Memo Approvers • Award Approvers • Amendment Actions (Program Office) • Reporting • Grants Monitoring • Budget Worksheet (Advanced Course)
Program Coordinator (PC) PC	• New Competitive Application Processing (Program Office) • Non-Competing Continuation (NCC) Processing (Program Office) • Funding Memo Approvers • Award Approvers • Amendment Actions (Program Office) • Budget Worksheet (Advanced Course)
Administrator Director (AD) AD	• New Competitive Application Processing (Program Office) • Non-Competing Continuation (NCC) Processing (Program Office) • Funding Memo Approvers • Award Approvers • Amendment Actions (Program Office)

GMM Grantor Roles	
Role	**Available Courses**
Program Budget Officer (PBO) PBO	• New Competitive Application Processing (Program Office) • Non-Competing Continuation (NCC) Processing (Program Office) • Funding Memo Approvers • Award Approvers • Amendment Actions (Program Office) • Budget Worksheet (Advanced Course)
Program Office Director (OD) OD	• New Competitive Application Processing (Program Office) • Non-Competing Continuation (NCC) Processing (Program Office) • Funding Memo Approvers • Award Approvers • Amendment Actions (Program Office) • Budget Worksheet (Advanced Course)
Program Authorizing Official (PAO) PAO	• New Competitive Application Processing (Program Office) • Non-Competing Continuation (NCC) Processing (Program Office) • Amendment Actions (Program Office) • Funding Memo Approvers • Award Approvers • Amendment Actions (Program Office) • Budget Worksheet (Advanced Course)
Deputy Authorizing Official (DAO) DAO	• New Competitive Application Processing (Program Office) • Non-Competing Continuation (NCC) Processing (Program Office) • Funding Memo Approvers • Amendment Actions (Program Office) • Budget Worksheet (Advanced Course)
Financial Management Officer (FMO) FMO	• Funding Memo Approvers • Award Approvers • Financial Management Officer (FMO) Actions

GMM Grantor Roles	
Role	**Available Courses**
Research Director (RD) RD	- New Competitive Application Processing (Program Office) - Funding Memo Approvers - Non-Competing Continuation (NCC) Processing (Program Office) - Amendment Actions (Program Office) - Budget Worksheet (Advanced Course)

GMM Recipient Roles	
Role	**Available Courses**
Authorizing Official/ Authorizing Representative (ADO) ADO	• [Recipient Actions](#) • [Non-Competing Continuation (NCC)](#)
Financial Officer (FO) FO	• [Recipient Actions](#) • [Non-Competing Continuation (NCC)](#)
Financial Officer Support (FSS) FSS	• [Recipient Actions](#) • [Non-Competing Continuation (NCC)](#)
Program Director/ Principal Investigator (PI/PD) PI/PD	• [Recipient Actions](#) • [Non-Competing Continuation (NCC)](#)
Support Staff (SS) SS	• [Recipient Actions](#) • [Non-Competing Continuation (NCC)](#)

OLDC Grantor Roles	
Role	**Available Courses**
Auditor (A) A	• Online Data Collection (Grants and Program Office)
(Regional Office) R/O Specialist (ROS) ROS	• Online Data Collection (Grants and Program Office)
(Regional Office) R/O Grants/Program Officer (ROO) ROO	• Online Data Collection (Grants and Program Office)
(Central Office) C/O Specialist (COS) COS	• Online Data Collection (Grants and Program Office)
(Central Office) C/O Grants/Program Officer (COO) COO	• Online Data Collection (Grants and Program Office)

OLDC Recipient Roles	
Role	**Available Courses**
Data Entry Person (DEP) DEP	• [Online Data Collection (Recipients)](#)
Authorized Official (AO) AO	• [Online Data Collection (Recipients)](#)
Grant Director (GD) GD	• [Online Data Collection (Recipients)](#)
Grant Administrator (GA) GA	• [Online Data Collection (Recipients)](#)
View-Only (VO) VO	• [Online Data Collection (Recipients)](#)

Grants Monitoring Grantor Roles	
Role	**Available Courses**
Federal Program Officer (FPO) FPO	• [Grants Monitoring](#)
Fiscal Federal Program Officer (FFPO) FFPO	• [Grants Monitoring](#)
Back-Up Federal Program Officer (BFPO) BFPO	• [Grants Monitoring](#)
Regional Manager (RM)	• [Grants Monitoring](#)

RM	
Back-Up Regional Manager (BRM) BRM	• [Grants Monitoring](#)