

## QUICK SHEET: APPLICATION RECOMMENDATION – SERVICE AREA TRANSFER

AUDIENCE: PROGRAM OFFICE

### PURPOSE

Program Office staff can reassign an application’s service area from the “Application Recommendation” screen. The *Service Area Transfer* link is available when the Intake Review is complete, the status is Review in Progress, and the Funding Memo for that application has not yet been created.

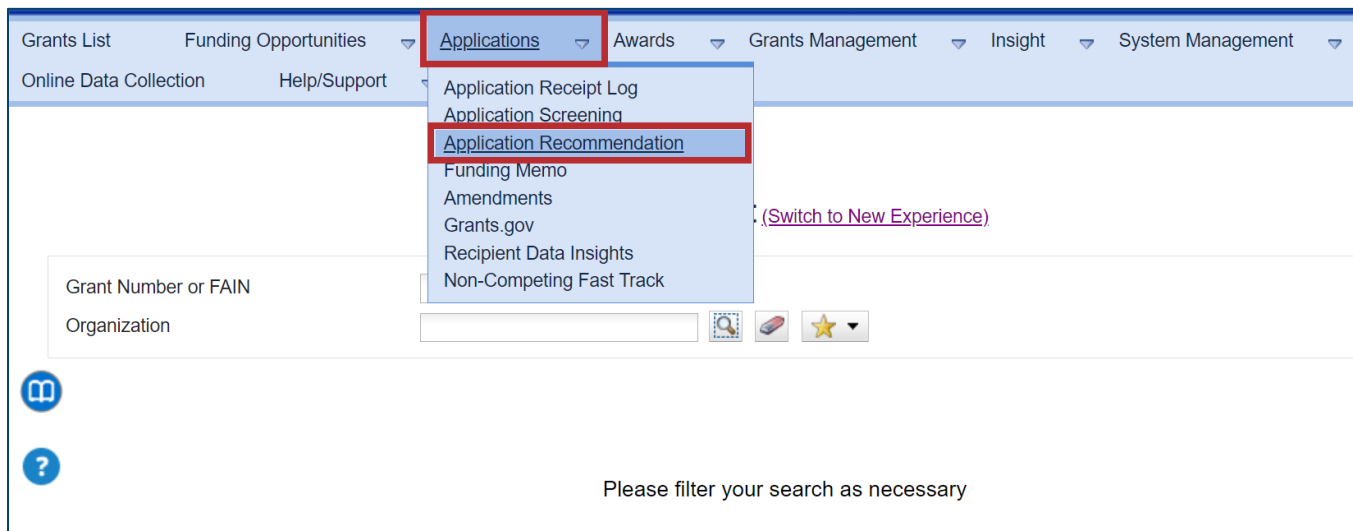
This Quick Sheet provides step-by-step instructions for reassigning a service area in GrantSolutions Grants Management Services (GMM). For instructions on reassigning a single application's service area, continue to the [Performing Service Area Transfer for a Single Application](#) section. For instructions on transferring multiple applications from one service area to another simultaneously, skip to the section [Performing Service Area Transfer in Bulk](#).

**Note:** For Login information and instructions, please view the GrantSolutions Login Quick Sheet.

### Performing Service Area Transfer for a Single Application

To move a single application from one service area to another, perform the following steps:

1. From the GMM menu bar, click the **Applications** drop-down and select the **Application Recommendation** option.



The screenshot shows the GrantSolutions GMM menu bar. The 'Applications' dropdown menu is open, and 'Application Recommendation' is highlighted. The menu items are: Application Receipt Log, Application Screening, Application Recommendation, Funding Memo, Amendments, Grants.gov, Recipient Data Insights, and Non-Competing Fast Track. Below the menu bar, there is a search bar with 'Grant Number or FAIN' and 'Organization' fields, and a button labeled 'Please filter your search as necessary'.

- The “Application Recommendation” screen appears. Enter data into the **Application Number**, **Grant Number or FAIN**, or **Organization** fields, and click the **search** icon, which appears as a magnifying glass.

### Application Recommendation

[Advanced Search](#)

Application Number

Grant Number or FAIN

Organization

Please filter your search as necessary

- A results table appears below the search fields. Click the **view details** icon to the left of the application to expand the row.

### Application Recommendation

[Advanced Search](#)

Application Number

Grant Number or FAIN

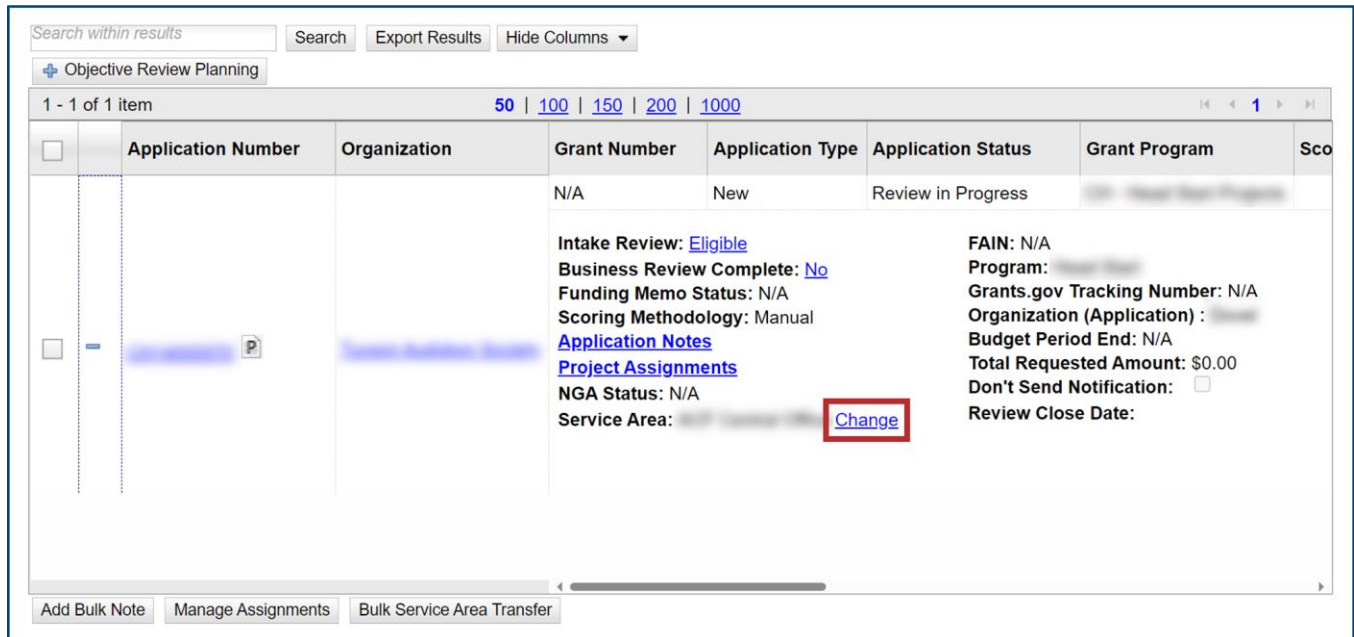
Organization

Search within results

[+ Objective Review Planning](#)

1 - 1 of 1 item							
	Application Number	Organization	Grant Number	Application Type	Application Status	Grant Program	Sco
<input checked="" type="checkbox"/> <input style="border: 2px solid red;" type="checkbox"/>	<a href="#">[Application Number]</a>	<a href="#">[Organization]</a>	N/A	New	Review in Progress	<a href="#">[Grant Program]</a>	

- The row expands and additional fields and actions are available. To the right of the *Service Area* field, click the **Change** link.



Search within results Search Export Results Hide Columns

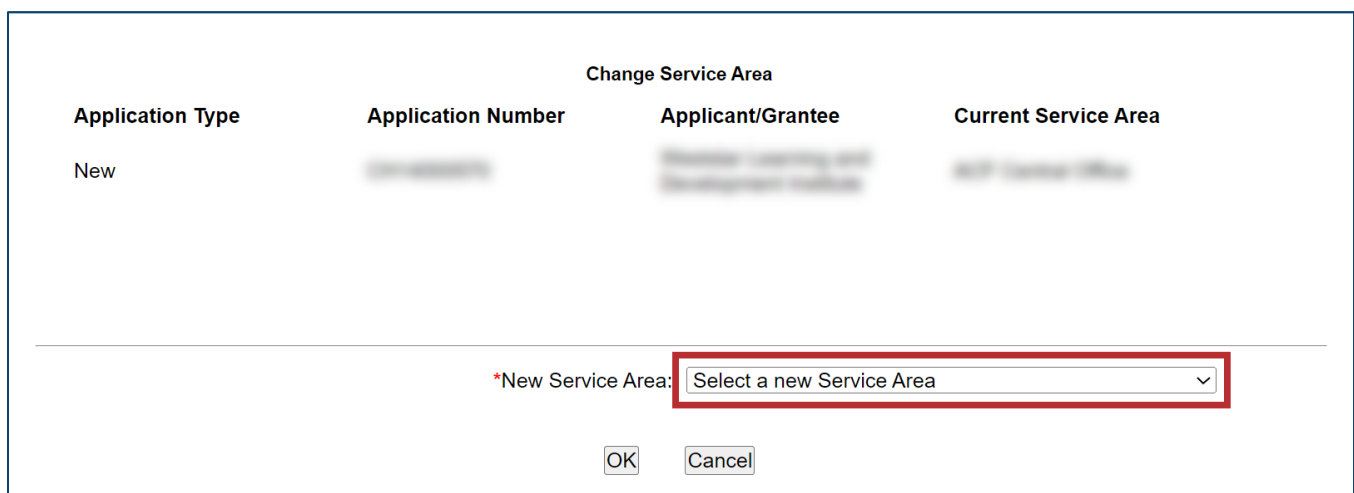
Objective Review Planning

1 - 1 of 1 item 50 | 100 | 150 | 200 | 1000

	Application Number	Organization	Grant Number	Application Type	Application Status	Grant Program	Score
<input type="checkbox"/>			N/A	New	Review in Progress		
<input type="checkbox"/>			Intake Review: <a href="#">Eligible</a> Business Review Complete: <a href="#">No</a> Funding Memo Status: N/A Scoring Methodology: Manual <a href="#">Application Notes</a> <a href="#">Project Assignments</a> NGA Status: N/A Service Area:		FAIR: N/A Program: Grants.gov Tracking Number: N/A Organization (Application): Budget Period End: N/A Total Requested Amount: \$0.00 Don't Send Notification: <input type="checkbox"/> Review Close Date:		
					<a href="#">Change</a>		

Add Bulk Note Manage Assignments Bulk Service Area Transfer

- The “Change Service Area” screen appears in a new window. The *Application Type*, *Application Number*, *Applicant/Grantee*, and *Current Service Area* fields appear at the top for the previously selected application. Select a service area from the **New Service Area** drop-down.



Change Service Area

Application Type	Application Number	Applicant/Grantee	Current Service Area
New			

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\*New Service Area:

OK Cancel

6. Click the **OK** button.

**Change Service Area**

Application Type	Application Number	Applicant/Grantee	Current Service Area
New			

---

\*New Service Area:   ▼

→
OK
Cancel

The “Application Recommendation” screen refreshes and the previous search is cleared. The application is now moved to the new service area.

Search within results
Search
Export Results
Hide Columns ▼

+ Objective Review Planning

1 - 1 of 1 item
50 | 100 | 150 | 200 | 1000

□	Application Number	Organization	Grant Number	Application Type	Application Status	Grant Program	Score
□			N/A	New	Review in Progress		

Intake Review: [Eligible](#)

Business Review Complete: [No](#)

Funding Memo Status: N/A

Scoring Methodology: Manual

[Application Notes](#)

[Project Assignments](#)

NGA Status: N/A

Service Area:   [Change](#)

FAIN: N/A

Program:

Grants.gov Tracking Number: N/A

Organization (Application):

Budget Period End: N/A

Total Requested Amount: \$0.00

Don't Send Notification: ☐

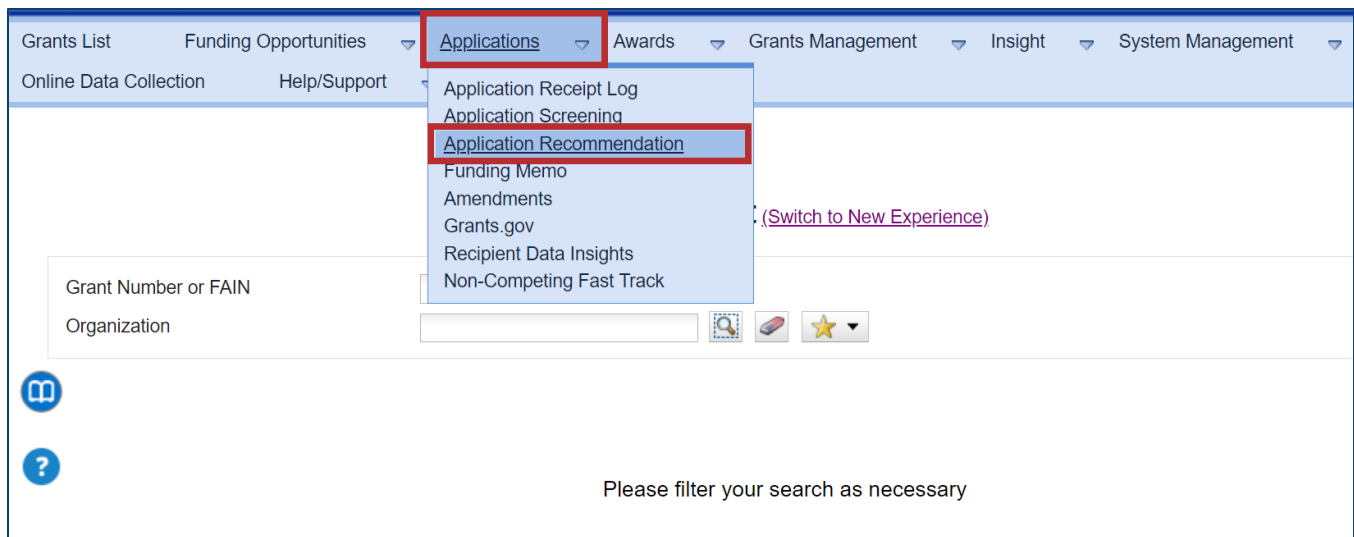
Review Close Date:

Add Bulk Note
Manage Assignments
Bulk Service Area Transfer

### PERFORMING SERVICE AREA TRANSFER IN BULK

Users may also transfer multiple applications at once from one service area to another using Bulk Service Area Transfer. To perform a Bulk Service Area Transfer, complete the following steps:

1. From the GMM menu bar, click the **Applications** drop-down and select the **Application Recommendation** option.



The screenshot shows the GrantSolutions GMM (Grants Management) menu bar. The 'Applications' drop-down menu is open, and the 'Application Recommendation' option is highlighted with a red box. The menu bar includes the following items: Grants List, Funding Opportunities, Applications, Awards, Grants Management, Insight, and System Management. The 'Applications' drop-down menu includes the following options: Application Receipt Log, Application Screening, Application Recommendation, Funding Memo, Amendments, Grants.gov, Recipient Data Insights, and Non-Competing Fast Track. Below the menu bar, there is a search bar with the text 'Grant Number or FAIN' and 'Organization'. To the right of the search bar, there is a link that says '(Switch to New Experience)'. At the bottom of the page, there is a message that says 'Please filter your search as necessary'.




- The “Application Recommendation” screen appears. Click the **Advanced Search** link on the right side of the screen.

[Advanced Search](#)


Application Number

Grant Number or FAIN





Organization


- The “Application Recommendation” screen advanced search appears. To add additional criteria to a search, click the **search criteria** drop-down icon and select a **option** from the drop-down.

Submitted After  05/01/2021

▼ Default / Selected Search Criteria

 \* Assignment Type: All Applications
  Intake Review Status: Eligible
  Submitted After: 05/01/2021
  Submitted Before: 06/01/2021

Please filter your search as necessary

Submitted After  05/01/2021

- Submitted After
- Submitted Before
- Announcement
- Application #
- Application Status**
- Application Type
- Funding Opportunity #
- \* Assignment Type
- Country
- Intake Review Status
- Grant #
- Grant Program
- Organization
- Organization (Application)
- Grants.gov Tracking #
- Program
- Recommended Decision
- U.S. State or Territory

- Click the **filter** to the right of the search criteria drop-down icon.

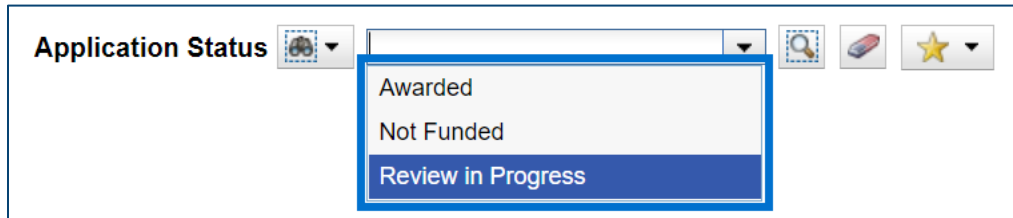
Application Status





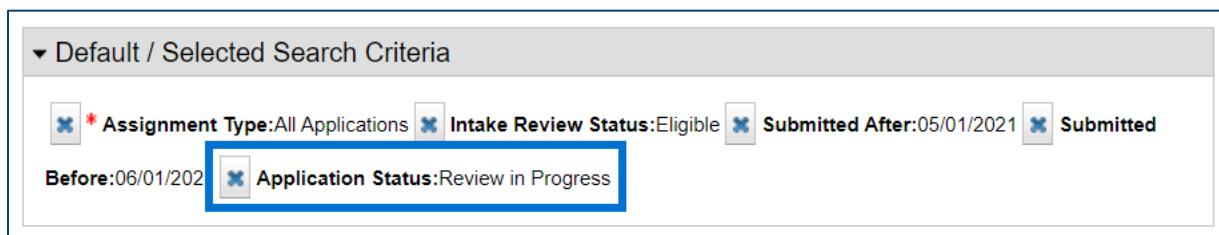


Depending on the selected filter, the field to the right contains possible drop-down options, a calendar widget, or a text field to enter search information.



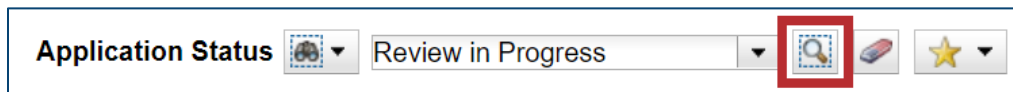
A screenshot of the 'Application Status' filter. The dropdown menu is open, showing three options: 'Awarded', 'Not Funded', and 'Review in Progress'. The 'Review in Progress' option is highlighted in blue. To the right of the dropdown are icons for a magnifying glass, a calendar, and a star.

If an option is selected or entered, it appears in the *Default/Selected Search Criteria* section.



A screenshot of the 'Default / Selected Search Criteria' section. It shows a list of search criteria: '\* Assignment Type:All Applications', 'Intake Review Status:Eligible', 'Submitted After:05/01/2021', 'Submitted', and 'Before:06/01/2021'. The 'Application Status:Review in Progress' criterion is highlighted with a blue box.

5. Click the **Search** icon (magnifying glass) to display search results.



A screenshot of the 'Application Status' filter. The dropdown menu is closed, and the text 'Review in Progress' is displayed in the input field. The magnifying glass icon (Search) is highlighted with a red box.

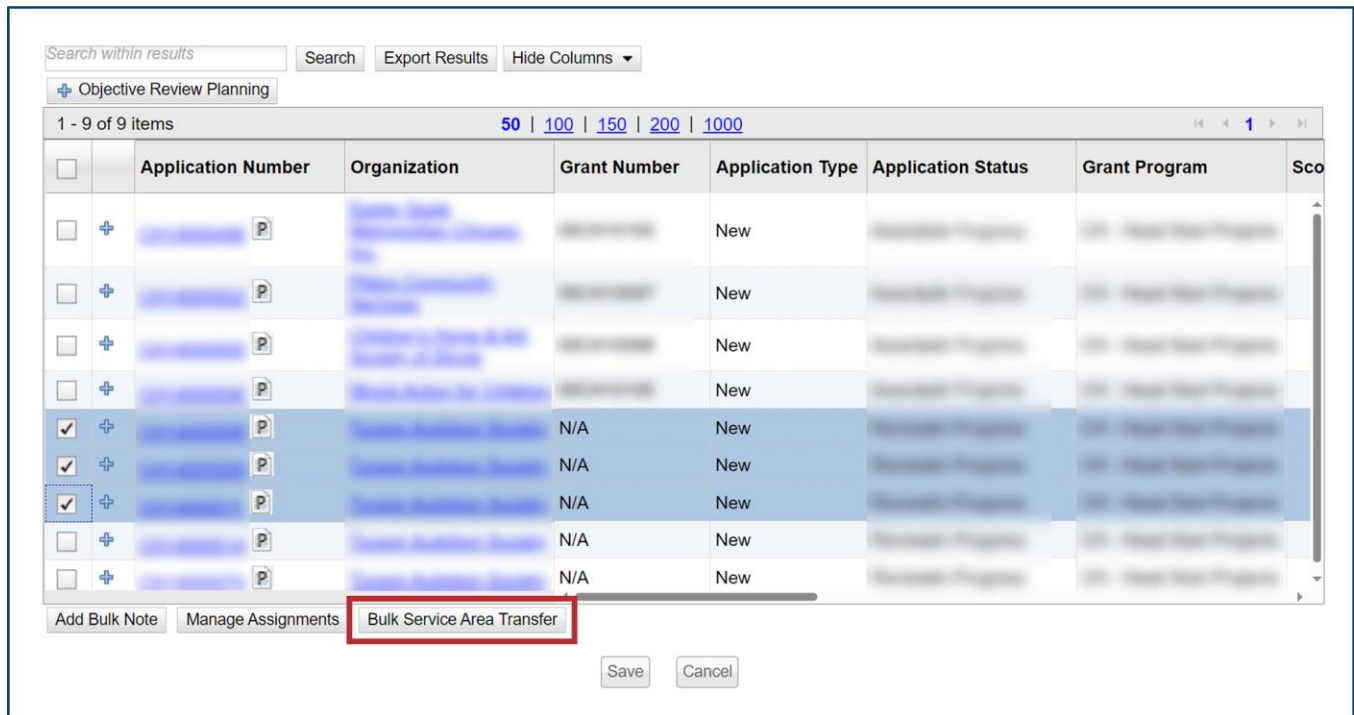
6. A results table appears below the search fields. In the results table, select the **checkbox** to the left of each desired application.

1 - 9 of 9 items
50 | 100 | 150 | 200 | 1000

<input type="checkbox"/>	Application Number	Organization	Grant Number	Application Type	Application Status	Grant Program	Sco
<input type="checkbox"/>		...	...	New	...	...	
<input type="checkbox"/>		...	...	New	...	...	
<input type="checkbox"/>		...	...	New	...	...	
<input type="checkbox"/>		...	...	New	...	...	
<input checked="" type="checkbox"/>		...	N/A	New	...	...	
<input checked="" type="checkbox"/>		...	N/A	New	...	...	
<input checked="" type="checkbox"/>		...	N/A	New	...	...	
<input type="checkbox"/>		...	N/A	New	...	...	
<input type="checkbox"/>		...	N/A	New	...	...	



7. Scroll to the bottom of the screen and click the **Bulk Service Area Transfer** button.



Search within results Search Export Results Hide Columns ▾

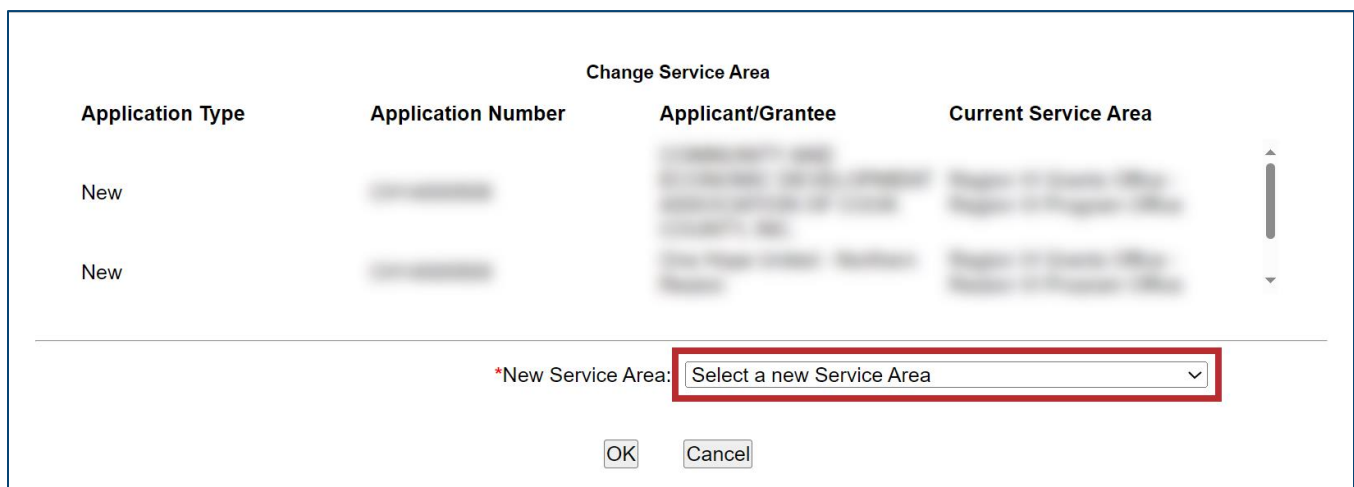
+ Objective Review Planning

1 - 9 of 9 items 50 | 100 | 150 | 200 | 1000

<input type="checkbox"/>	Application Number	Organization	Grant Number	Application Type	Application Status	Grant Program	Score
<input type="checkbox"/>				New			
<input type="checkbox"/>				New			
<input type="checkbox"/>				New			
<input type="checkbox"/>				New			
<input checked="" type="checkbox"/>			N/A	New			
<input checked="" type="checkbox"/>			N/A	New			
<input checked="" type="checkbox"/>			N/A	New			
<input type="checkbox"/>			N/A	New			
<input type="checkbox"/>			N/A	New			

Add Bulk Note Manage Assignments **Bulk Service Area Transfer** Save Cancel

8. The “Change Service Area” screen appears in a new window. The *Application Type*, *Application Number*, *Applicant/Grantee*, and *Current Service Area* fields appear at the top for the previously selected applications. Select a service area from the **New Service Area** drop-down.



Change Service Area

Application Type	Application Number	Applicant/Grantee	Current Service Area
New			
New			

\*New Service Area: **Select a new Service Area** ▾

OK Cancel

9. Click the **OK** button.

**Change Service Area**

Application Type	Application Number	Applicant/Grantee	Current Service Area
New			
New			

\*New Service Area: New Service Area

OK
Cancel

The “Application Recommendation” screen refreshes and the previous search is cleared. The applications are now moved to the new service area.

Search within results Search Export Results Hide Columns

+ Objective Review Planning

1 - 1 of 1 item 50 | 100 | 150 | 200 | 1000

checkbox	Application Number	Organization	Grant Number	Application Type	Application Status	Grant Program	Score
<input type="checkbox"/>			N/A	New	Review in Progress		
<input type="checkbox"/>			<div style="display: flex; justify-content: space-between;"> <div> <p>Intake Review: <a href="#">Eligible</a></p> <p>Business Review Complete: <a href="#">No</a></p> <p>Funding Memo Status: N/A</p> <p>Scoring Methodology: Manual</p> <p><a href="#">Application Notes</a></p> <p><a href="#">Project Assignments</a></p> <p>NGA Status: N/A</p> <p>Service Area: <span style="border: 2px solid blue; padding: 2px;">New Service Area</span> <a href="#">Change</a></p> </div> <div> <p>FAIN: N/A</p> <p>Program: <a href="#">New Service Area</a></p> <p>Grants.gov Tracking Number: N/A</p> <p>Organization (Application): <a href="#">New Service Area</a></p> <p>Budget Period End: N/A</p> <p>Total Requested Amount: \$0.00</p> <p>Don't Send Notification: <input type="checkbox"/></p> <p>Review Close Date:</p> </div> </div>				

Add Bulk Note Manage Assignments Bulk Service Area Transfer