QUICK SHEET: GENERATE AND AWARD PROCESSING

AUDIENCE: GRANTS MANAGEMENT OFFICERS (GMO) AND GRANTS MANAGEMENT SPECIALIST (GMS)

PURPOSE

This guide provides step-by-step instructions for processing new awards in the GrantSolutions Grants Management Module (GMM). It begins by generating a draft Notice of Award (NOA) from the Funding Memo screen and ends by saving and verifying the Edit Notice of Award screen.

Before generating a Draft NOA in GrantSolutions GMM, the Business Review must be completed, and the Funding Memo approved.

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

GENERATE THE DRAFT NOA

Once a new application is in the *Ready to Generate* status on the Funding Memo screen, a Grants Management Officer (GMO) or Grants Management Specialist (GMS) can generate the award.

To generate the draft NOA, follow the steps below:

1. From the GMM menu bar, click the **Awards** menu drop-down and select the **Funding Memo** option*.*
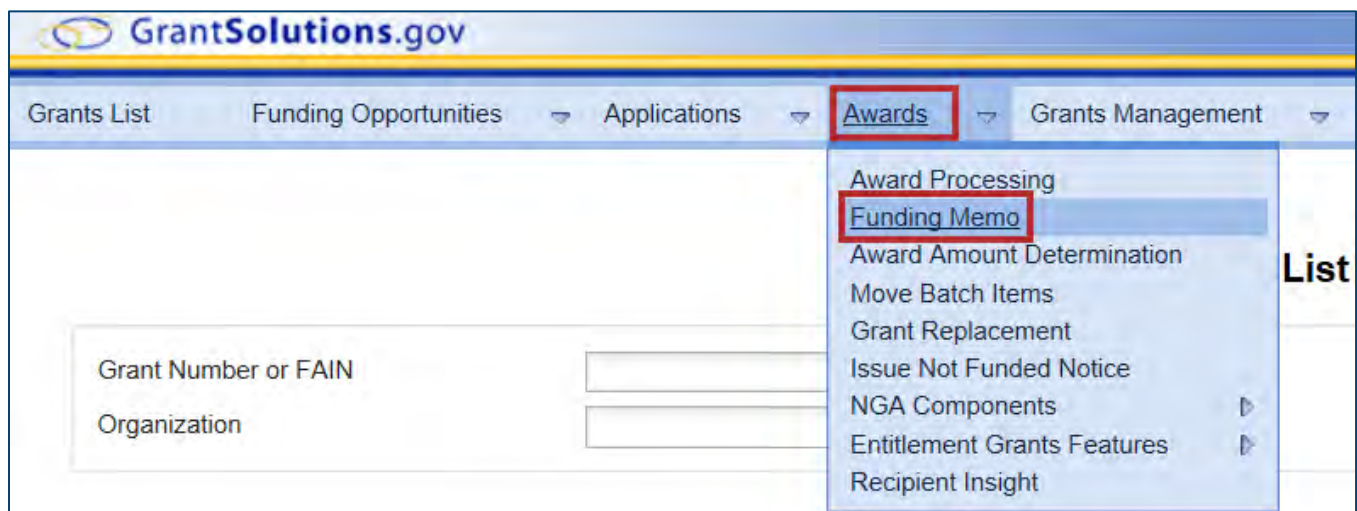
2. The "Funding Memo" screen appears. Select or enter criteria in at least one **search field** to locate the desired application and click the **Search** button.

Note: Selecting the *Approved* checkbox in the *Workflow States* section filters for applications in the *Approved* (Funding) Memo Status.

Funding Memo

Application Type ?	- Please select an Application Type - ▾
Announcement ?	
- Please select an Announcement - ▾	
Funding Opportunity #	- Please select a Funding Opportunity # - ▾
Grant Program ?	- Please select a Grant Program - ▾
Application Number ?	
Grant Number ?	
Assignment Options	☐ Only Display Memos for Primary Assignments
Display Options	☐ Only Display Memos for Projects Assigned to Me
WorkFlow States ?	☑ All Status ☑ Not Started ☐ Complete

☑ Administrative Review	☑ Approved	
☑ Budget Review	☑ 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]

3. The application(s) appears in the results table. Locate a desired application with the NGA Status of Ready to Generate.

4. Confirm the text *Ready to Generate* is visible in the *NGA Status* column. If this status is missing, the *Generate* link will not appear in the *Action* column. If the *NGA Status* column does not display, check to ensure the application is approved.

Note: The *NGA Status* column refers to the Notice of Grant Award status. In GrantSolutions GMM, the terms NGA and NOA are both used to refer to the Notice of Award.

5. From the *Action* column, click the **Generate** link**.**

6. The "Generated Draft NGA(s)" screen appears. This is when the system assigns a Grant Number for new awards. Click either the **Grant Number** link or the **Award Processing** link to proceed to the "Award Processing" screen.

The "Award Processing" screen appears and the *Workflow Status* is *Drafted*. The Award Processing screen is the starting point for accessing award processing activities.

AWARD PREPARATION

Once the award is generated, it is ready to be prepared by either the GMO or GMS depending on the partner's business process. Several actions are required to prepare the NOA for the review process. Actions include (in this order) Edit/Validate Organization, Select Org Address, Project Assignments, Budget Worksheet, Terms and Conditions, Funding Restrictions, Manage Project Abstract, Application Notes, and Edit Notice of Award.

Note: This section will review the actions linked above. For all other actions, please refer to their dedicated documentation.

To prepare the NOA, follow the steps below:

1. From the *Actions* column, click the **Open Award Overview** icon.

The "Award Overview" screen appears. This screen is where grants office roles will prepare and edit the draft Notice of Award. The *Award Preparation* column contains links that must be accessed to populate information on the draft NOA.

Note: Project information is available at the top of the screen.

Award Overview

Organization:			
Project Title:			
UEI:		**DUNS:**	178469425
CCR EIN:			
Grant Number:		**Approved Amount:**	$1,631,175.00
Amendment Number:	0	**Funds Restricted:**	No
Budget period Number:	1	**Project Period:**	11/01/2023 - 10/31/2028
FAIN:		**Budget Period:**	11/01/2023 - 10/31/2024
Application Number:		**Application Type:**	New
Workflow Status:	Drafted	**Last Updated By/Date:**	S tudent2 - 11/01/2024

Award Preparation
Edit/Validate Organization
Select Org Address
Project Assignments
Budget Worksheet
Terms and Conditions
Funding Restrictions
Manage Commitments
Manage Project Abstract
Application Notes

Edit Notice of Award

Award Actions
Ready for Review
Change Type to Replacement
Delete Notice of Award

Award Information
Application
Award Workflow History
Next Workflow Actions
Funding Memo
Award Summary
View/Print Notice Of Award
Recipient Data Insights

Close

The Award Preparation links and descriptions are as follows:

Award Preparation Link	Description
Edit/Validate Organization	Validates a recipient organization's SAM.gov information.
Select Org Address	Displays the primary and alternate recipient organization addresses that are available to populate the NOA. Once an address is validated, it fills the congressional district on the NOA.
Project Assignments	Opens Project Assignments in a new window. Users can view or add active, new, and expired grantor and recipient assignments.
Budget Worksheet	Open, view, or modify the draft award budget.
Terms and Conditions	Add or modify terms and conditions.
Funding Restrictions	Document and track funding restrictions on the NOA.
Manage Project Abstract	When used, it provides summary information for the grant project.
Application Notes	View or add application messages during the award process. Application Messages become part of the official grant project record. **Note**: The text states Application Note, but this link redirects users to the Application Messages screen.
Edit Notice of Award	View and edit the draft NOA.

EDIT/VALIDATE ORGANIZATION

The first link in the *Award Preparation* column is Edit/Validate Organization. Follow the steps below:

1. From the *Award Preparation* column, click the **Edit/Validate Organization** link to validate that the grant recipient organization has an active registration with Sam.gov.

2. The "Organization Information" screen appears. Scroll to the bottom of the screen and click the **CCR Validation** button. If the status is *Not Validated*, please contact the grant recipient to update their status. If it shows Validated, proceed to the next step. If the organization is a duplicate, please contact the GrantSolutions Help Desk.

Note: The CCR Validation button will change to the Revalidation button once clicked.

3. Click the **Close** button to return to the "Award Overview" screen.

Address Information

Country	
Department/Division	
Street Address	
City	
State	
Zip Code	
Congressional District	
Address Validation Status	Not Validated

Edit   CCR Validation   Close

SELECT ORG ADDRESS

To validate the congressional district code and select/modify the address that displays on the NOA, follow the steps below:

1. From the *Award Preparation* column, click the **Select Org Address** link.

Award Preparation

Edit/Validate Organization
Select Org Address
Project Assignments
Budget Worksheet
Terms and Conditions
Manage Project Abstract
Application Notes

Edit Notice of Award

The "Select Grantee Address" screen appears. The organization's Name, EIN, and DUNS are listed at the top of the screen. The address table lists available addresses (primary or alternate) to select for the award. Ensure that the address chosen has *Yes* in the *Address Validated* column.

Note: The primary address populates from the submitted SF-424 but is updated once the organization's SAM.gov registration is validated. It can then no longer be modified.

2. Select the radio button of the correct **address** and click the **Save** button.

Name	
Level	Grantee
EIN	
UEI	
DUNS	

Please select the address to use for Award Number:

☐ Show deleted addresses

Select	Address Type	Attention Line	Department and Division	Street Address and Mail Stop	City and State/Province	Zip/Postal Code	Address Validated	Last Updated Date	Action
	Primary Address						N/A	06/15/2023	View
○	Alternate Address						No	09/21/2017	Edit | Delete
◉	Alternate Address		HHS				Yes	04/12/2016	Edit | Delete
○	Alternate Address						No	11/21/2014	Edit | Delete

Add New Address   Save   Cancel

PROJECT ASSIGNMENTS

Use project assignments to designate which individual(s) serve in the various grantor and recipient roles for a draft award. Additionally, any user whose name should appear on the NOA must have the project assignment.

The "Award Overview" screen appears. From the *Award Preparation* column, click the **Project Assignments** link to review and select the roles that must appear on the draft NOA.

Award Preparation

Edit/Validate Organization
Select Org Address
Project Assignments
Budget Worksheet
Terms and Conditions
Manage Project Abstract
Application Notes

Edit Notice of Award
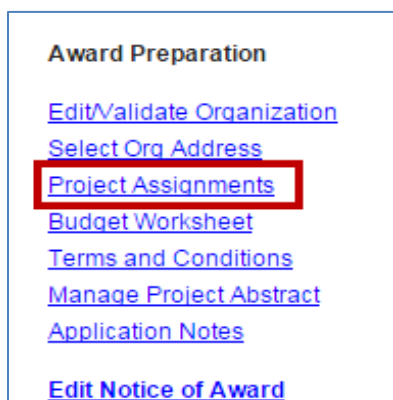
The "Project Assignments" screen appears. Ensure that the grantor and grant recipient roles that need to display on the NOA and project assignment updates based on the partner's business processes. Failing to assign these roles will generate an error when the draft NOA is validated.

3. When done, click the **Save and Close** button to save and return to the "Award Overview" screen.

EDIT THE BUDGET WORKSHEET

Navigate to the Budget Worksheet to verify the budget amounts by category or modify the approved budget. Follow the steps below:

4. From the *Award Preparation* column of the "Award Overview" screen, click the **Budget Worksheet** link.

The "Budget Worksheet" screen appears.

Budget Worksheet

Applicant: ⓘ University ▓▓▓▓▓▓	**Project Period:** ⓘ 11/01/2018 - 10/31/2019	**Current Funding Amount:** ⓘ $ 100,000.00
EIN: ⓘ ▓▓▓▓▓	**Budget Period:** ⓘ 11/01/2018 - 10/31/2019	**Prior Funding Amount:** ⓘ $ 0.00
Grant Number: ⓘ 1▓▓▓▓▓▓-01-00	**Budget Year:** ⓘ 1	**Total Approved Fed Amount:** ⓘ $ 100,000.00
Application #: ⓘ 1▓▓▓▓	**Amendment #:** ⓘ 0	

Calculate Budget as:

◉ Total Cost (Total Budget - Non-Federal - In Kind Contributions - Unobligated Reprogram - Unobligated Offset)

○ Federal Only (Total Budget - Unobligated Reprogram - Unobligated Offset)

Current Scenario: [ALs Scenario] *(This is the Active Scenario)*

Add Activity	[ ]		Create New Scenario
Delete Activity	Select an Activity ▾		Reset
Rename Activity	Select an Activity ▾		Delete Current Scenario

Below the Budget Worksheet header section are Budget Worksheet features. The table below outlines their use:

Budget Worksheet Features	Description
Calculate Budget as	The radio buttons indicate if the budget should track federal and non-federal values (Total Cost) by category in the Direct Cost section, or federal values only (Federal Only). The default selection is determined by the bureau but can be manually changed for a specific Budget Worksheet.
View/Create Scenario	A scenario is an exact copy of the original Budget Worksheet and allows a user to work with the budget without changing the original version.
Activity	Create, rename, or delete additional activity tabs. Tabs electronically generated from the SF-424A cannot be deleted. Only tabs manually added to the Budget Worksheet by the grantor can be removed.
Print	Print a Budget Worksheet from the top right corner of the screen.

Values entered on the SF-424A are transferred to activity tab(s) on the Budget Worksheet. The *Totals* tab represents the cumulative values from all activity tabs. When more than one activity tab exists, the values displayed on the *Totals* tab are read-only.
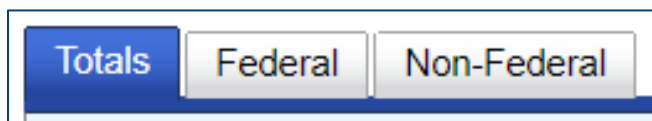
Activity tabs are where budget amounts may be entered, or existing values edited.
- When the budget in an activity tab is edited, the *Totals* tab recalculates and displays the updated budget values. The active tab is highlighted in blue.
- Some sections on the *Totals* tab are read-only (Direct Cost, Non-Federal, etc.).

REVIEWING AND UNDERSTANDING THE BUDGET WORKSHEET

Review each activity tab to ensure budget values are correct. After clicking an activity tab, the budget categories and various columns appear. Edit budget values within the Recommended column of an activity tab when necessary.

The *Direct Cost* section of the Budget Worksheet displays budget values in the appropriate budget category (*Personnel*, *Travel*, *Equipment*, etc.) listed on the left. If a budget value needs to be corrected, fields may be edited.

- The *Requested* column contains the amount entered on the SF-424A and is not editable.
- The *Agency Adjusted Requested* column (located in the same column as *Requested*) is where Federal staff may edit the *Requested* amount transferred from the SF-424A. **Note:** This feature is only used if a value was entered incorrectly on the original SF-424A.

	Direct Cost (Federal)						
Category	Requested / Agency Adjusted Requested	Adjustment	Recommended	Total	Non-Federal	Federal
Salaries And Wages	0.00	100000.00	100000.00	100,000.00	0.00	100,000.00
Fringe Benefits	0.00	0.00	0.00	0.00	0.00	0.00
Travel	0.00 / 5000.00	-5000.00	0.00	0.00	0.00	0.00
Equipment	0.00 / 10000.00	-10000.00	0.00	0.00	0.00	0.00
Supplies	0.00	0.00	0.00	0.00	0.00	0.00

The *Recommended* column is used to adjust a *Requested* value and impacts the overall budget total. **Note**: The *Recommended* amount is reflected in the *Grand Totals* row of the *Direct Cost* section and on the Totals tab—in the *Total This Action* row of the *Final Budget Totals* section.

| | Requested | Direct Cost (Federal) | | |
Category	Agency Adjusted Requested ⑦	Adjustment ⑦	Recommended ⑦	Total ⑦
Salaries And Wages	0.00	100000.00	100000.00	100,000.00
Fringe Benefits	0.00	0.00	0.00	0.00

The *Total This Action* row indicates the amount to be awarded with this action. This populates the *Amount Awarded This Action* field on the NOA.

Final Budget Totals	
Total Budget ⑦	100,000.00
Non-Federal (May Include Program Income) ⑦	0.00
Federal ⑦	100,000.00
Unobligated Funds - Reprogram	0.00
Unobligated Funds Offset	0.00
In Kind Contribution ⑦	0.00
Program Income ⑦	0.00
Total This Action ⑦	100,000.00

SAVE AND VERIFY BUDGET WORKSHEET
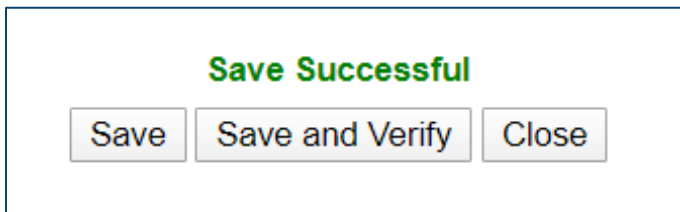
When finished reviewing or editing the Budget Worksheet:

5. Click the **Save and Verify** button to ensure there are no errors.
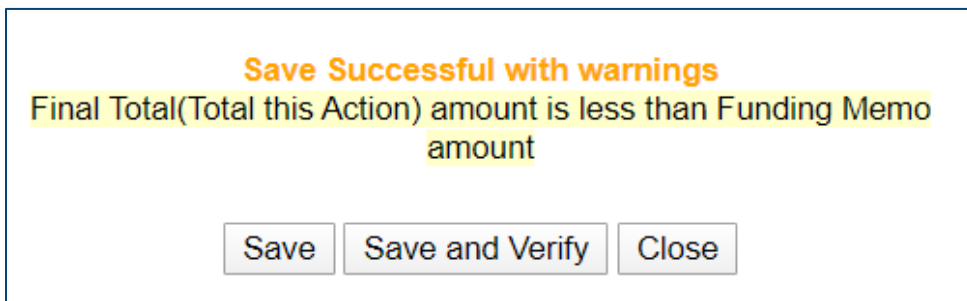
If there are no errors, a *Save Successful* message displays.
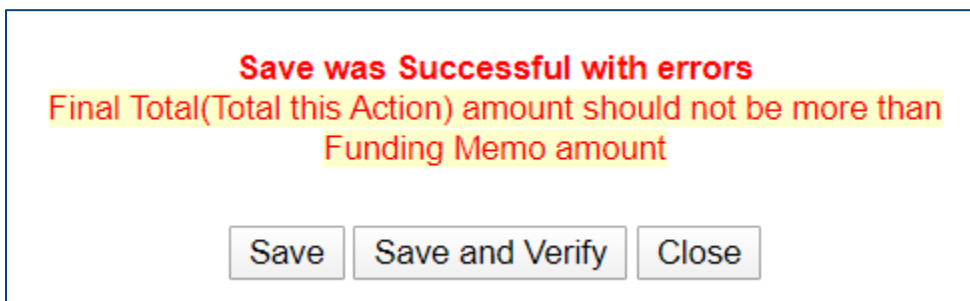
Note: If there is a warning, the *Save Successful with warnings* message with a description of the warning displays above the *Save and Verify* button. Warnings allow the user to continue in the award preparation process.

Note: If there is an error, the *Save was Successful with errors* message displays above the *Save and Verify* button with a description of the error. After addressing errors, select the *Save and Verify button* again. The message must be either *Save Successful* or *Save Successful with warnings* to continue in the award preparation process.

6. Click the **Close** button to return to the "Award Overview" screen.
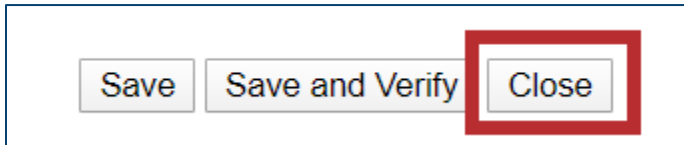
TERMS AND CONDITIONS

Use the Terms and Conditions link to view, add new terms and conditions components and templates to the draft NOA. Users can also upload files to be added to the NOA. **Note:** Please refer to the Terms and Conditions guide for more information. Follow the steps below:

1. The "Award Overview" screen appears. Click the **Terms and Conditions** link to add new or existing terms and conditions and add attachments to the draft NOA.

Award Preparation

Edit/Validate Organization
Select Org Address
Project Assignments
Budget Worksheet
Terms and Conditions
Funding Restrictions
Manage Project Abstract
Application Notes

Edit Notice of Award

The "Terms and Conditions" screen appears.

Terms and Conditions

View/Print NGA

This NGA does not contain any components.

Add New   Add Existing   Add Template

Include Project Abstract   ● No ○ Yes

Award Attachments

View/Print NGA

Description:
File to Upload: Choose File   No file chosen
Upload
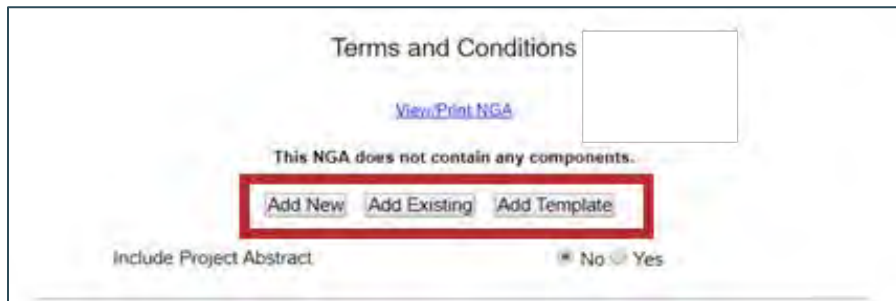
Description	Attachments	Status	Actions

* Status updates every 10 seconds

Close
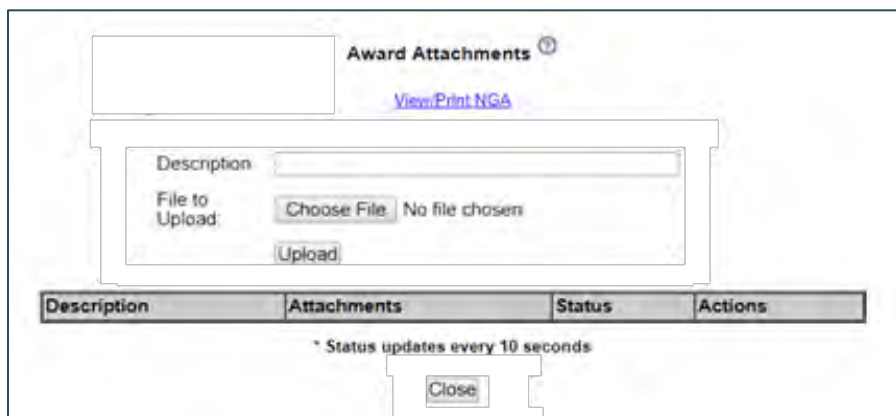
2. The top section of the screen, *Terms and Conditions*, allows users to add new or existing component(s) or templates.

Note: Users can choose to include the project abstract in the draft NOA by selecting the *Yes* or *No* radio button.

3. The bottom section, *Award Attachments,* allows users to upload files to be added to the NOA.

Note: To view or print the Terms and Conditions and the award attachment(s), click the **View/Print NGA** link.

4. When done, click the **Close** button to return to the "Award Overview" screen.

EDIT NOTICE OF AWARD

After completing the steps to populate the NOA, work can begin on the "Edit Notice of Award" screen. Use the "Edit Notice of Award" screen to review the entire draft NOA, including but not limited to selecting the officials that appear on the NOA, modifying project period start and end dates, verifying the funding lines, and completing the Federal Funding Award Transparency Act (FFATA) fields.

To review and modify the draft NOA, follow the steps below:

1. From the *Award Preparation* column of the "Award Overview" screen, click the **Edit Notice of Award** link.
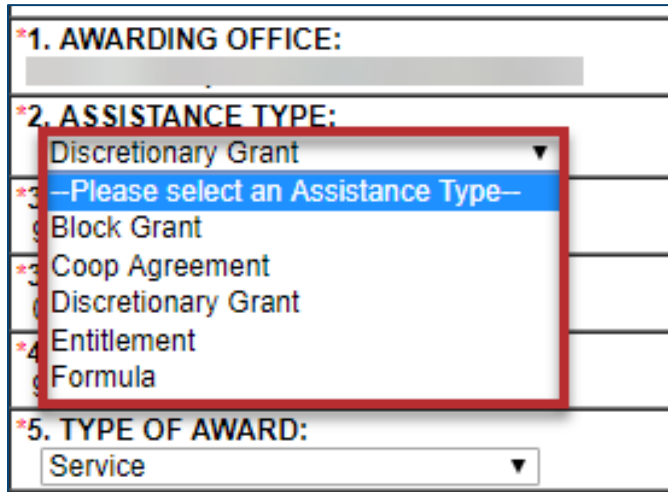
The Edit Notice of Award screen displays. Many fields on this screen come from the announcement, application, and the steps taken during the award preparation process.

Note: The following images of a NOA may include different options and text depending on the federal agency. The examples on the following pages only represent one type of NOA.

2. For this example, confirm the *Assistance Type*. If necessary, select the correct **Assistance Type** from the drop-down menu.
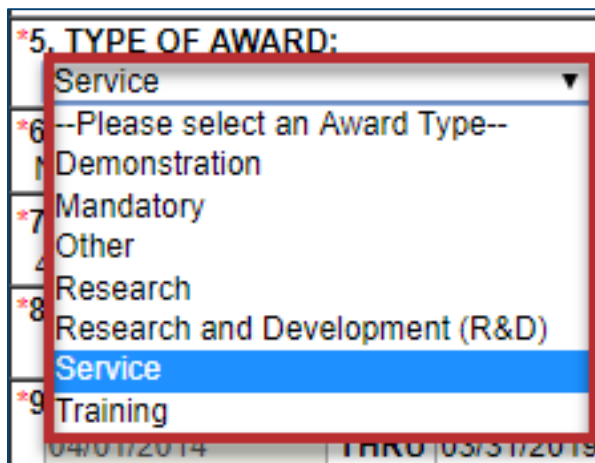
3. Confirm the *Type of Award* is correct. If necessary, select the correct **Type of Award** from the drop-down menu.

4. Ensure information is provided for all required fields and drop-downs. Some information to confirm are:

- Project Assignments must be made so that the names appear in the drop-down lists. Choose the Program Officer (PO), Grantee Authorizing Official (ADO), Principal Investigator/Program Director (PI/PD), and Grants Management Officer (GMO). **Note**: If other roles should be added, please refer to the partner's business process.
- Ensure the *Award Amount* is correct.
- Select an Object Class.

FINANCIAL INFORMATION

Verify that all information in the *Financial Information* section is correct.

- Make sure to select the corresponding **Financial Account** (also referred to as the Common Account Number or CAN) for the award budget year.
- Always check the *Document Number*. For continuations, the *Document Number* may need to be changed to reflect the current year.
- Enter the *Amount Awarded this Action*. **Note**: This amount must match the totals on the Funding Memo and Budget Worksheet.

Note: This amount populates from the Budget Worksheet. Any adjustments should be made on the "Budget Worksheet" screen. The amount awarded may be less than the Funding Memo but cannot exceed the approved amount.

FINANCIAL ACCOUNT	DOCUMENT NO.	ADMINISTRATIVE CODE	AMT ACTION FIN ASST	APPROPRIATION	Treasury Account Symbol Account Code	Treasury Account Symbol Sub-Account Code
21a. [▼]	b.	c. [▼]	d. $ 10000.00	e.	f.	g.
22a. --Please select a financial account-- ▼	b.	c. --Please select an admin code-- ▼	d. $	e.	f. 0000	g.
23a. --Please select a financial account-- ▼	b.	c. --Please select an admin code-- ▼	d. $	e.	f. 0000	g.
24a. --Please select a financial account-- ▼	b.	c. --Please select an admin code-- ▼	d. $	e.	f. 0000	g.
25a. --Please select a financial account-- ▼	b.	c. --Please select an admin code-- ▼	d. $	e.	f. 0000	g.
26a. --Please select a financial account-- ▼	b.	c. --Please select an admin code-- ▼	d. $	e.	f. 0000	g.
27a. --Please select a financial account-- ▼	b.	c. --Please select an admin code-- ▼	d. $	e.	f. 0000	g.
28a. --Please select a financial account-- ▼	b.	c. --Please select an admin code-- ▼	d. $	e.	f. 0000	g.
29a. --Please select a financial account-- ▼	b.	c. --Please select an admin code-- ▼	d. $	e.	f. 0000	g.
30a. --Please select a financial account-- ▼	b.	c. --Please select an admin code-- ▼	d. $	e.	f. 0000	g.

FEDERAL FUNDING TRANSPARENCY ACT AWARD INFORMATION (FFATA)

There are three sections on the "Notice of Award – Draft" screen relating to the FFATA. These sections must be filled out correctly before the award is validated. The FFATA information is sent to USASpending.gov.

1. To the right of the *Funding Transparency Act Award Recipient Information* section, click the **Show/Hide** button.

2. Select a required **Recipient Type** from the drop-down.

Note: When the organization and address are validated with SAM.gov, the *Congressional District* and *Dun and Bradstreet Confidence Code* prepopulate.

3. To the right of the *Funding Transparency Act Award Project and Award Information* section, click the **Show/Hide** button. Verify that all information is correct.

Funding Transparency Act Award Recipient Information: Show/Hide
Funding Transparency Act Award Project & Award Information: Show/Hide
Funding Transparency Act Award Principal Place Of Performance Information: Show/Hide

Note: This section is read-only.

Funding Transparency Act Award Recipient Information: Show/Hide
Funding Transparency Act Award Project & Award Information: Show/Hide

Please select this box if you wish to bypass FFATA reporting ☐

Major Agency ⑦

Major Agency Code ⑦

Partner Agency Name ⑦

State Application Id ⑦

Assistance Type ⑦   Block Grant

Program Source/Treasury Account Symbol Agency Code

Funding Transparency Act Award Principal Place Of Performance Information: Show/Hide

4. To the right of the *Funding Transparency Act Award Principal Place of Performance Information* section, click the **Show/Hide** button.

Funding Transparency Act Award Recipient Information: Show/Hide
Funding Transparency Act Award Project & Award Information: Show/Hide
Funding Transparency Act Award Principal Place Of Performance Information: Show/Hide

5. In the *POP Code* field, click the **edit…** button.

6. The *Place of performance code* pop-up appears. Click the **One State/Province** or **Multi State/Province** radio button.

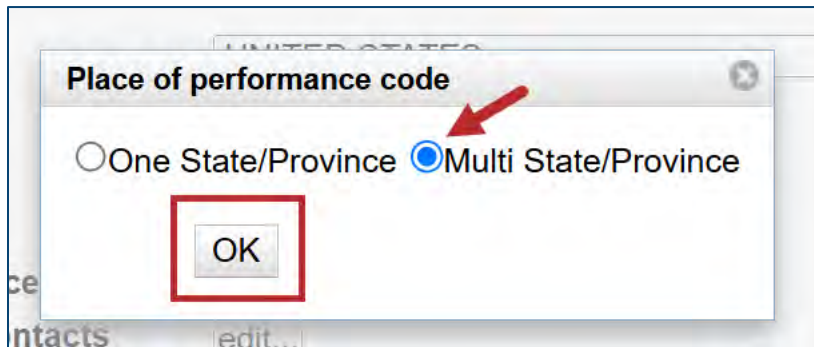**Note:** By default, the One State/Province radio button is selected.

a. If Multi State/Province is chosen, click the **OK** button.

b. If the One State/Province is chosen, **answer** each applicable question. Click the **OK** button.
Note: The screenshot below displays all the questions that could be asked if the *No* radio button is selected.

Place of Performance code pop up window Place of Performance code pop up window

The *Funding Transparency Act Award Principal Place of Performance Information* section appears. The Pop Code and State Senators displays. **Note**: If County or City/Place or Zip Code were selected, it will be populated.

7. To the right of the *Congressional Contacts* field, click the **edit...** button.

8. Select the **names** of the *Representatives* from the drop-down.
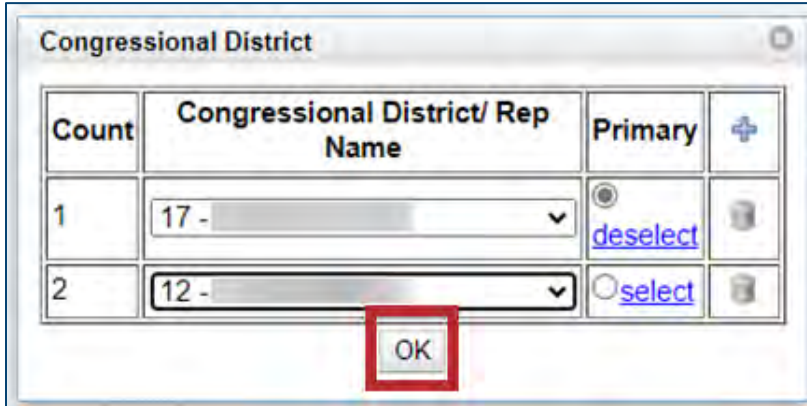

9. Use the radio button to indicate a *Primary*.

Note: To add an additional *Congressional District/Representative Name*, click the **Add Congressional District** icon.

10. Click the **OK** button to return to the *Funding Transparency Act Award Principal Place of Performance Information* section.

SAVE AND VERIFY

When all information is complete on the Edit Notice of Award screen, click the **Save and Verify** button.

If there are no warnings or errors, the Award Overview screen displays. Note: If errors are found, make the corrections and click the *Save and Verify* button again. If warnings are found, users can continue with processing.