

QUICK SHEET: PROCESS NEW APPLICATIONS – INTAKE REVIEW

AUDIENCE: GRANTS MANAGEMENT OFFICERS (GMO), GRANTS MANAGEMENT SPECIALISTS (GMS), GRANTS SUPPORT STAFF (GSS)

INTRODUCTION

The “Intake Review” screen consists of a pre-set list of questions designed to help a screener determine whether an application is eligible to move forward in the application review process. Intake Review questions are set by the Grant Program and can also be defined by announcement for competitive funding opportunities.

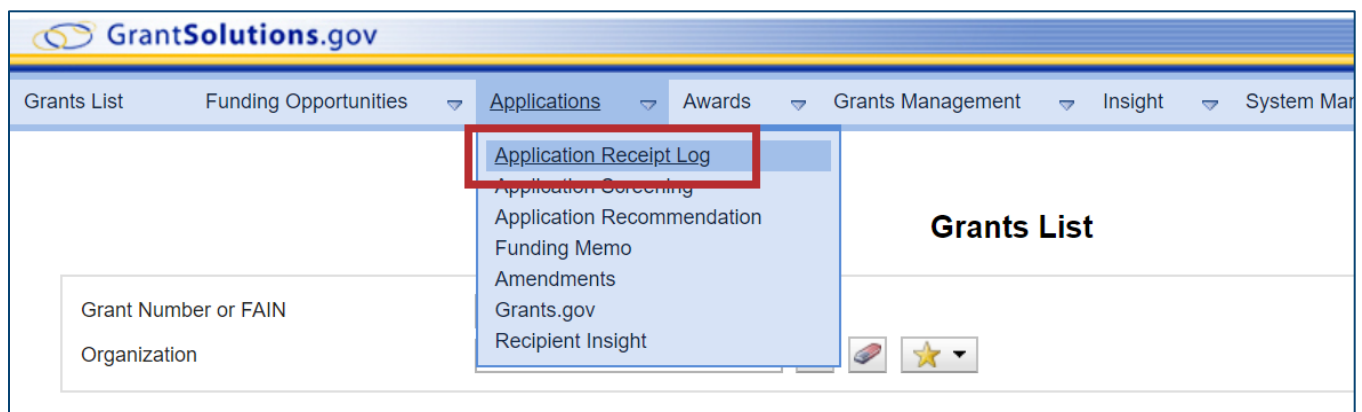
The “Intake Review” screen contains multiple choice and short answer questions. Each multiple-choice question allows the following responses: Yes, No, or Not Applicable. Each short answer text field allows up to 70 characters. This quick sheet provides step-by-step instructions for completing the Intake Review.

PERFORM THE INTAKE REVIEW

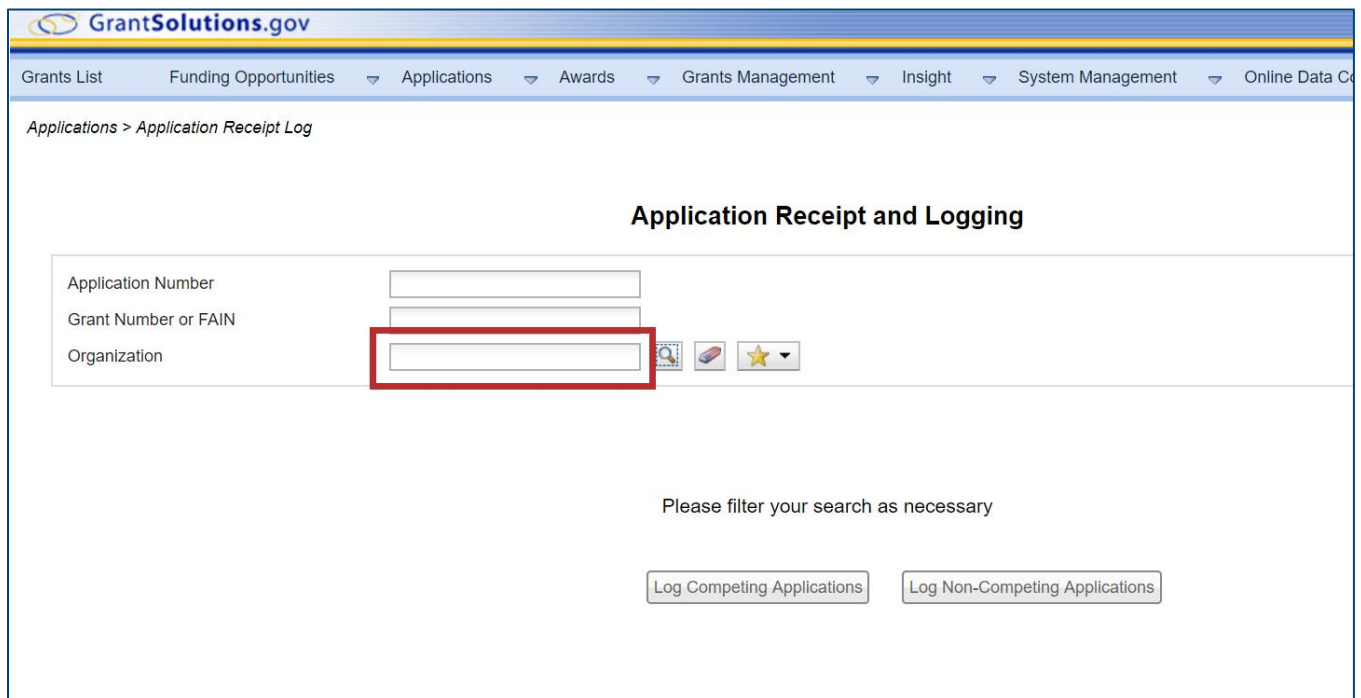
To verify an applicant’s eligibility in GrantSolutions GMM, follow the steps below:

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

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



- The *Application Receipt and Logging* screen displays. From the *Application Receipt and Logging* Simple Search screen, enter the **applicant organization's** name in the *Organization* field.



GrantSolutions.gov

Grants List Funding Opportunities Applications Awards Grants Management Insight System Management Online Data

Applications > Application Receipt Log

Application Receipt and Logging

Application Number

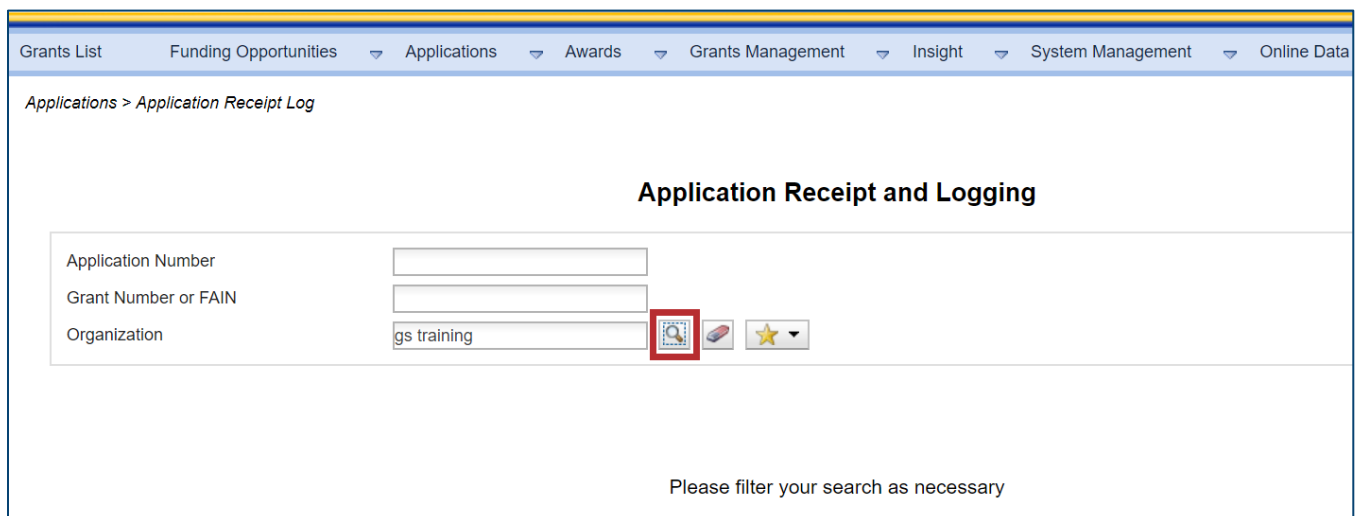
Grant Number or FAIN

Organization

Please filter your search as necessary

Log Competing Applications Log Non-Competing Applications

- Select the **Search** icon.



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Grants List Funding Opportunities Applications Awards Grants Management Insight System Management Online Data

Applications > Application Receipt Log

Application Receipt and Logging

Application Number

Grant Number or FAIN

Organization

Please filter your search as necessary

4. The Results table displays. From the *Actions* column, select the **Intake Review** icon.

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Applications List Funding Opportunities Applications Awards Grants Management Insight System Management Online Data Collection Help/Support




Page 1

Application Receipt and Logging

Advanced Search










Application Number

Grant Number or FAIN

Organization   

Search within results Search Export Results Hide Columns

1 - 50 of 52 items 50 | 100 | 150 | 200 | 1000

	Submission Date	Application #	Application Type	Announcement	Grant Program	Organization	Budget Period End Date	Application Status	Actions
<input type="checkbox"/>	07/11/2020 12:00:00 AM		New	Training Test		The GS Training Center	N/A	Complete	   
<input type="checkbox"/>	06/10/2020 12:00:00 AM	(To be assigned) 	New			The GS Training Center	N/A	Received	  

The “Intake Review” screen displays. **Note:** To view or create an Application Message, click the *Application Notes* link. To access the “GrantSolutions Application Control Checklist” screen, click the *Application Number* link.

Intake Review

*** indicates a required field.**

[Application Notes](#)

Program Office

Program Name

Grant Program

Grants Servicing Office

Applicant/Grantee Name

City Sacramento

State CA

Type of Application New

Application Number

Grant Number N/A

Year of Support 1

5. Answer all required questions.

Note: Questions with a red asterisk are required. Questions and required fields may vary.

Grant Number	N/A
Year of Support	1

Question	Answer
Is this an Eligible Applicant? *	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Number of Copies (Original + 2) *	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Proper Signature and Date (SF-424)? *	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Employer ID Number? *	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Intergovernmental Review Under E.O. 12372 if Required by the State *	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Budget Information Page (SF-424A)? *	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Proper Signature and Date (Assurances SF-424B)? *	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Narrative -- New and Continuations *	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Certification for Lobbying? *	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A

Eligibility

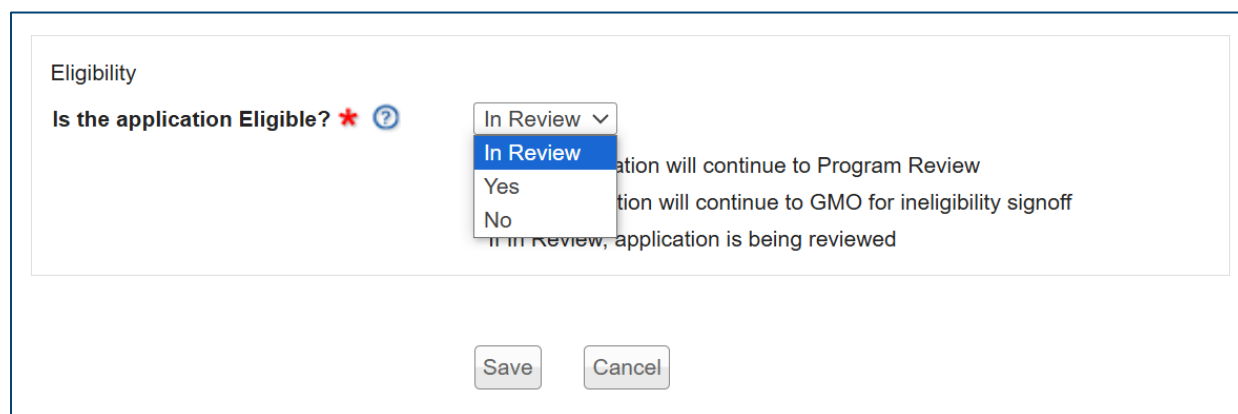
Is the application Eligible? * ? In Review ▾

* If Yes, application will continue to Program Review
 * If No, application will continue to GMO for ineligibility signoff
 * If In Review, application is being reviewed

6. From the *Eligibly* section at the bottom of the screen, select a **status** from the drop-down list.

Note: The table below describes the Intake Review statuses:

Intake Review Status	Description
In Review	Application screening is still in progress or has not started.
Yes	The application is eligible and is available on the “Application Recommendation” screen.
No	The application is ineligible. The warning message “If this Application is marked ineligible due to an incomplete package, please verify that the contents of the submission are consistent with the original application in grants.gov or GrantSolutions” displays at the bottom of the screen. Select the required checkbox to confirm the application’s ineligibility.



Eligibility

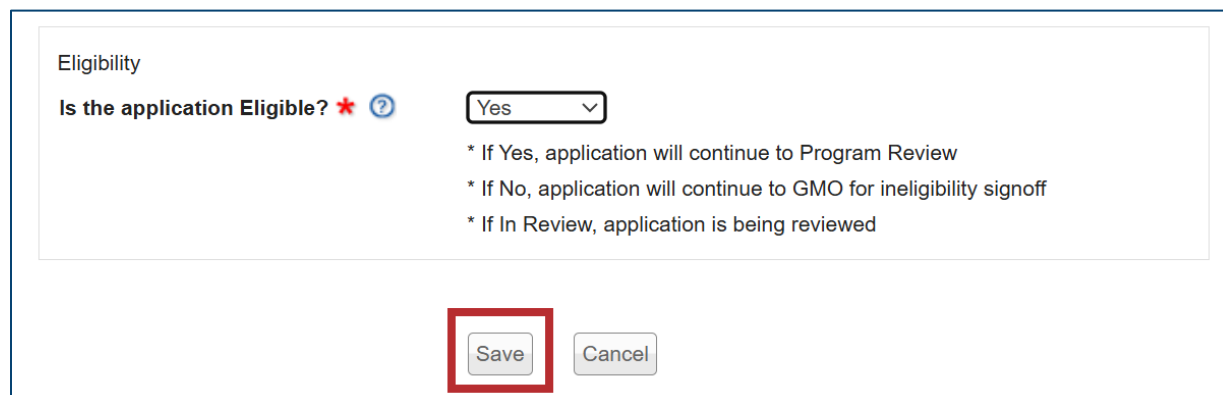
Is the application Eligible? * ?

In Review
In Review
Yes
No

ation will continue to Program Review
ation will continue to GMO for ineligibility signoff
In Review, application is being reviewed

Save Cancel

7. Select the **Save** button.



Eligibility

Is the application Eligible? * ?





















Yes

* If Yes, application will continue to Program Review
* If No, application will continue to GMO for ineligibility signoff
* If In Review, application is being reviewed

Save Cancel





The “Application Receipt and Logging” screen appears. The *Application Status* is *Review in Progress*, and the *Intake Review: Eligible* icon shows in the *Actions* column.




1 - 50 of 87 items [50](#) | [100](#) | [150](#) | [200](#) | [1000](#)





	Submission Date	Application #	Application Type	Announcement	Grant Program	Organization	Budget Period End Date	Application Status	Actions
<input type="checkbox"/>	11/14/2010 12:00:00 AM		New				N/A	Review in Progress	   
<input type="checkbox"/>	11/12/2010 05:32:40 PM		New				N/A	Review in Progress	   
<input type="checkbox"/>	11/12/2010 04:56:38 PM		New				N/A	Review in Progress	   
<input type="checkbox"/>	11/12/2010 04:56:33 PM		New				N/A	Review in Progress	   



Note: The Intake Review status icons are displayed in the *Legend* at the bottom of the “Application Receipt and Logging” screen.





Legend




 Open Application
 Open Application Notes
 Delete Application
 Organization




 GRANTS_GOV
 EXTERNAL_DIRECT
 Budget Worksheet

 Project Locale
 Categories
 Flagged as Sent
 Flagged as Clear

 Direct Assistance Worksheet
 Project Assignments

 Generate Acknowledgement
 Manage Project Abstract
 Intake Review: Eligible
 Intake Review: Ineligible

 Intake Review: In Review
 Business Review Complete: Yes
 Business Review Complete: No

 Business Review Complete: Yes, With Concerns
 PAPER
 GRANTSOLUTIONS

The next step in the application process is to perform the Application Recommendation.