



Grantsolutions Grants Management Services (GMM) Announcement Specific Intake Review Questions



Table of Contents

ANNOUNCEMENT SPECIFIC INTAKE REVIEW QUESTIONS	1
ADD INTAKE REVIEW QUESTIONS	1
<i>Finalize Questions</i>	19

ANNOUNCEMENT SPECIFIC INTAKE REVIEW QUESTIONS

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 review process. The Intake Review screen contains multiple-choice or 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. Set questions as either required or optional.

The Intake Review is often set up in advance for a Grant Program. However, Grantors with the Grants Management Specialist (GMS) or Grants Management Officer (GMO) role can create custom Intake Review questions for competitive Announcements.

ADD INTAKE REVIEW QUESTIONS

To add Intake Review questions for a specific competitive Announcement, complete the following steps.

Note: For Login information and instruction, please view the GrantSolutions Login Quick Sheet
The GrantSolutions GMM “Grants List” screen displays

GrantSolutions.gov

[GSInstructor-001] | GrantSolutions-10.2.2 06/27/2024 | Back

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




Page Help

Grants List [\(Switch to New Experience\)](#)

Advanced Search

Grant Number or FAIN

Organization

Please filter your search as necessary

Figure 1: Grants List screen

1. From the GrantSolutions GMM menu bar, select **Funding Opportunities**.

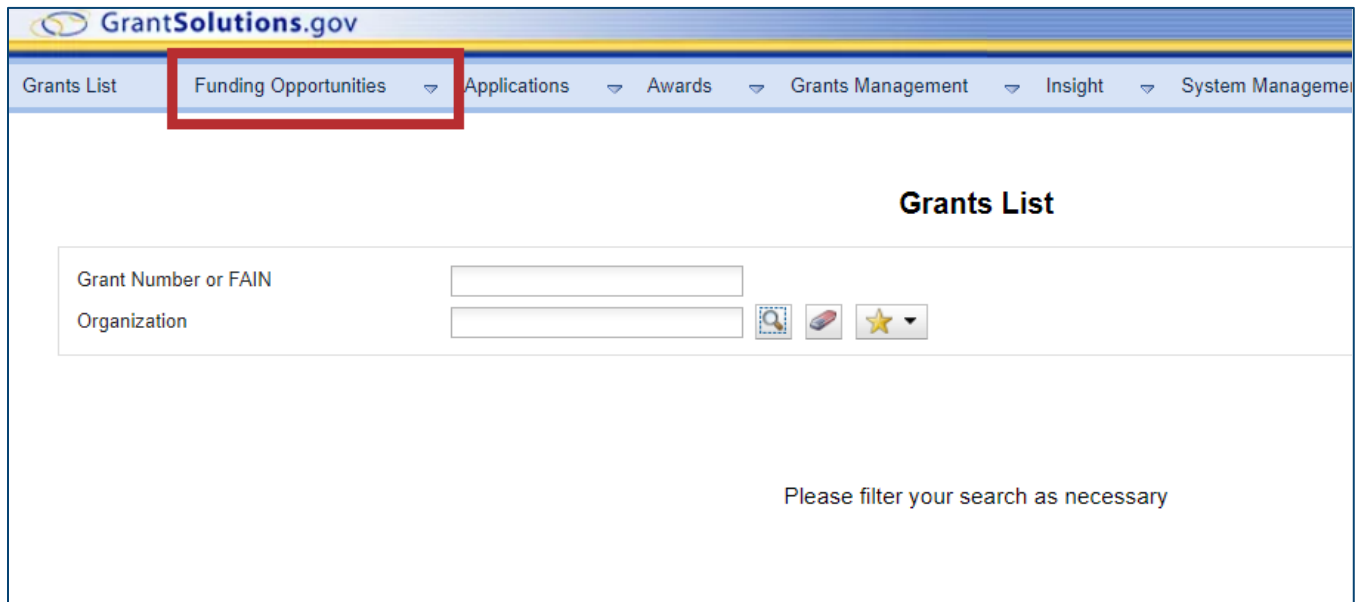


Figure 2: GMM Menu Bar – Funding Opportunities menu drop-down

2. From the *Funding Opportunities* menu, select the **Announcements** option.

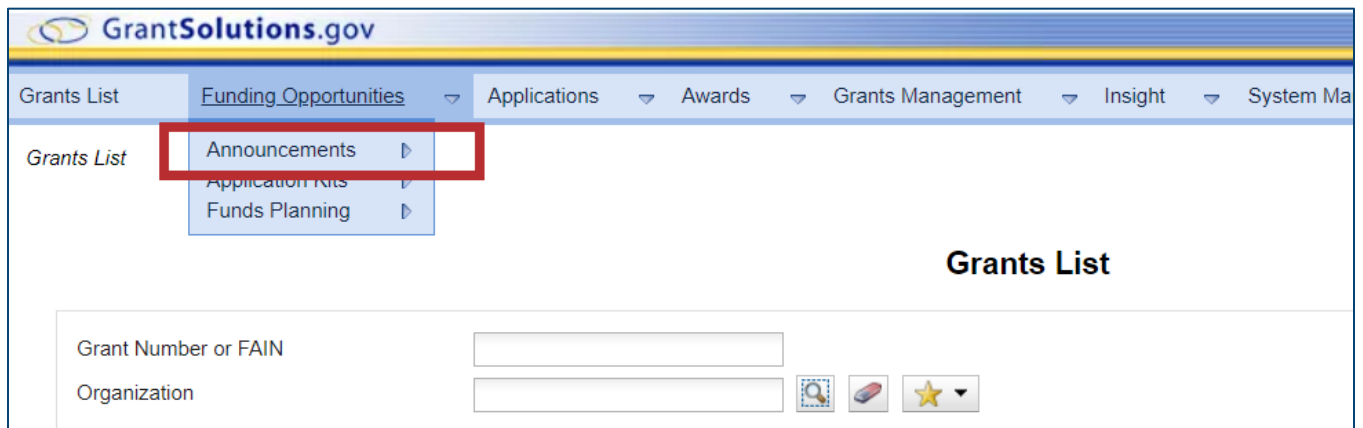
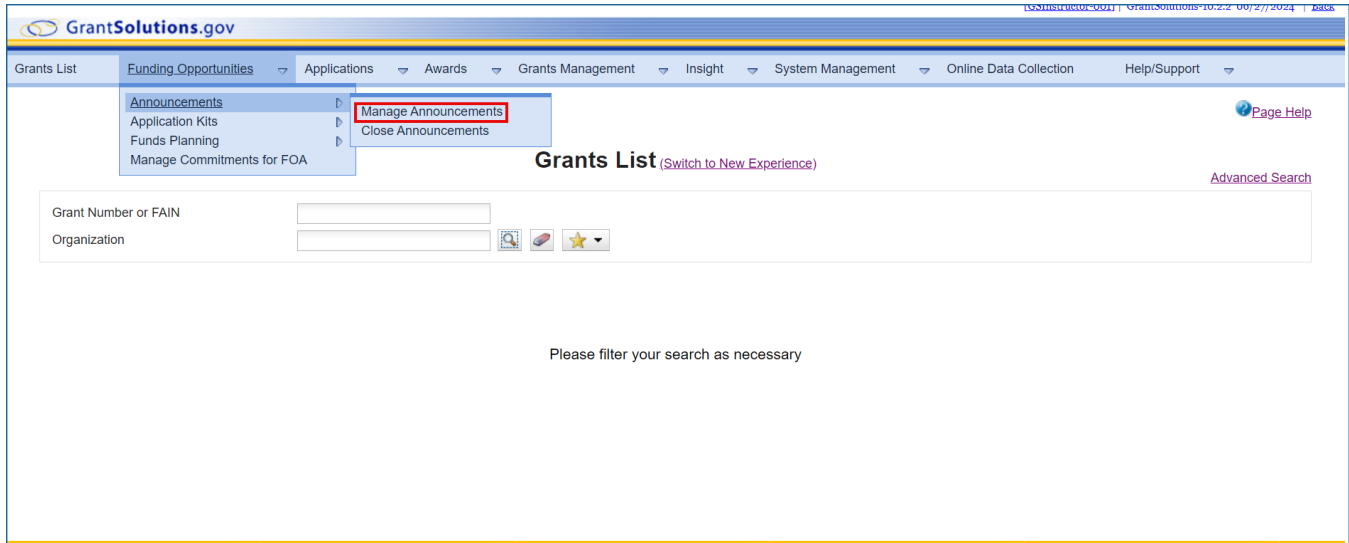


Figure 3: GMM Menu Bar – Funding Opportunities > Announcements

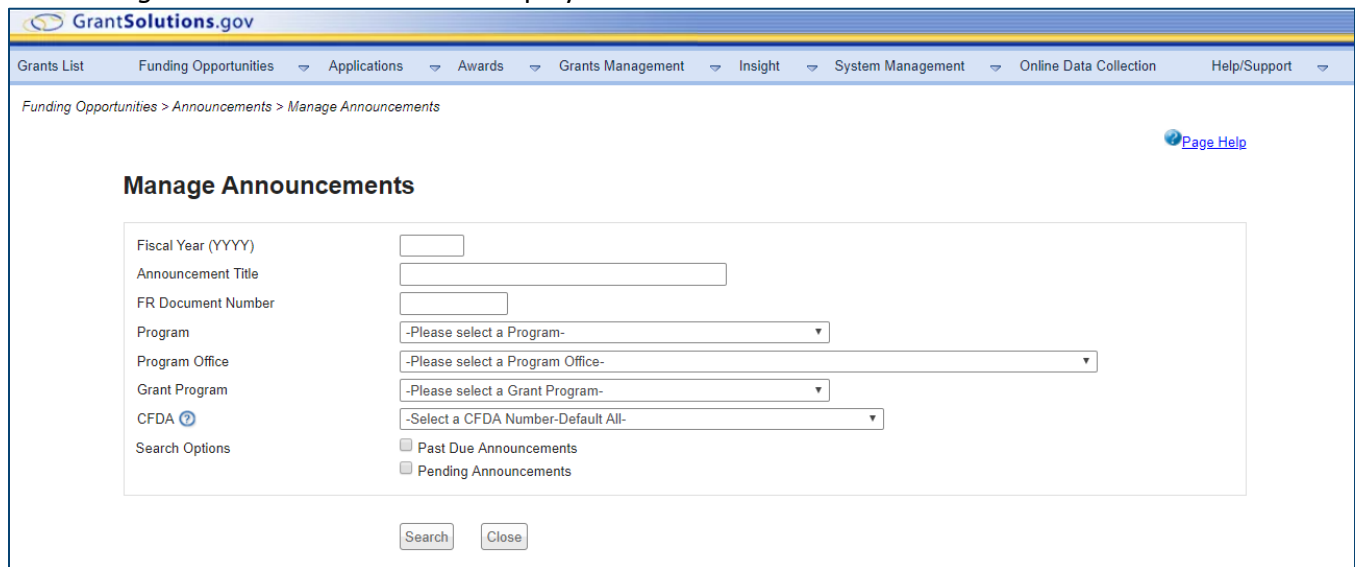
- From the *Funding Opportunities* menu, select the **Announcements > Manage Announcements** option.



The screenshot shows the GrantSolutions.gov website. The top navigation bar includes links for Grants List, Funding Opportunities, Applications, Awards, Grants Management, Insight, System Management, Online Data Collection, and Help/Support. The 'Funding Opportunities' menu is expanded, showing options for Announcements, Application Kits, Funds Planning, and Manage Commitments for FOA. The 'Announcements' option is further expanded, showing 'Manage Announcements' (highlighted with a red box) and 'Close Announcements'. Below the menu, there is a 'Grants List' section with a search bar for Grant Number or FAIN and Organization, and a 'Please filter your search as necessary' message.

Figure 4: GMM Menu Bar – Funding Opportunities > Announcements > Manage Announcements

The *Manage Announcements* screen displays.

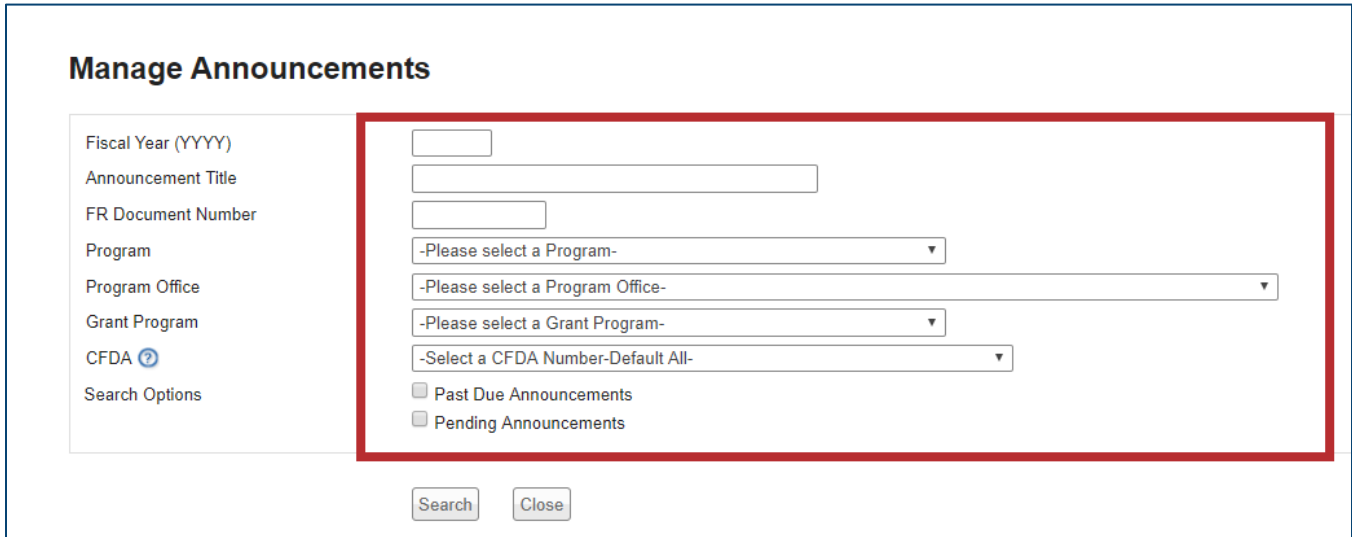


The screenshot shows the 'Manage Announcements' screen. The top navigation bar is the same as in Figure 4. The breadcrumb trail shows 'Funding Opportunities > Announcements > Manage Announcements'. The main heading is 'Manage Announcements'. Below the heading, there is a form with the following fields: Fiscal Year (YYYY), Announcement Title, FR Document Number, Program (dropdown menu), Program Office (dropdown menu), Grant Program (dropdown menu), CFDA (dropdown menu), and Search Options (checkboxes for Past Due Announcements and Pending Announcements). At the bottom of the form are 'Search' and 'Close' buttons.

Figure 5: Manage Announcements screen

4. Enter or select criteria in one or more of the search fields. The search criteria fields are:

- Fiscal Year (YYYY)
- Announcement Title
- FR Document Number
- Program
- Program Office
- Grant Program
- Catalog of Federal Domestic Assistance (CFDA)
- Search Options
- Past Due Announcements
- Pending Announcements



Manage Announcements

Fiscal Year (YYYY)

Announcement Title

FR Document Number

Program

Program Office

Grant Program

CFDA

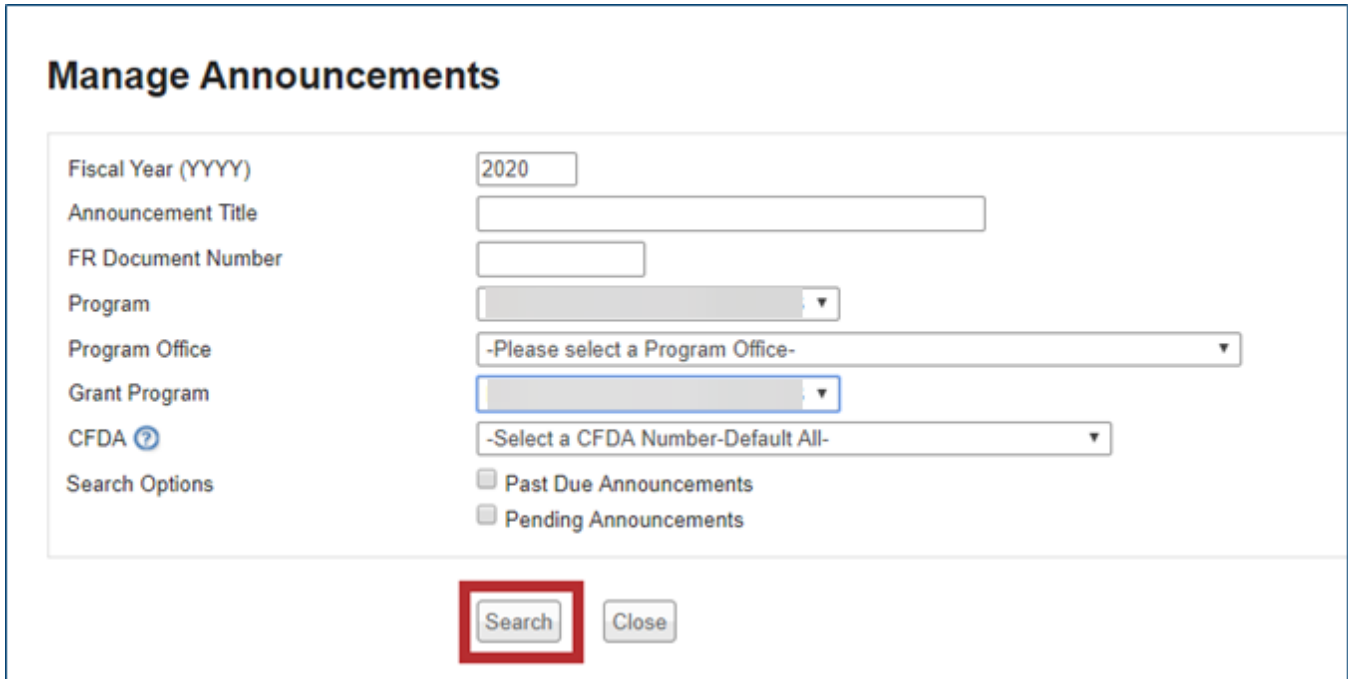
Search Options

☐ Past Due Announcements

☐ Pending Announcements

Figure 6: Manage Announcements screen – Search fields

5. Select the **Search** button.



The screenshot displays the "Manage Announcements" interface. It features a form with the following fields and options:

- Fiscal Year (YYYY): 2020
- Announcement Title: [Text input field]
- FR Document Number: [Text input field]
- Program: [Dropdown menu]
- Program Office: -Please select a Program Office- [Dropdown menu]
- Grant Program: [Dropdown menu]
- CFDA ⓘ: -Select a CFDA Number-Default All- [Dropdown menu]
- Search Options:
 - ☐ Past Due Announcements
 - ☐ Pending Announcements

At the bottom of the form, there are two buttons: "Search" and "Close". The "Search" button is highlighted with a red rectangular box.

Figure 7: Manage Announcements screen – Search button

Results display in a table below the search fields.

Manage Announcements

Fiscal Year (YYYY)
Announcement Title
FR Document Number
Program
Program Office
Grant Program
CFDA
Search Options ☐ Past Due Announcements ☐ Pending Announcements

Announcement Title (Internal)	Competition ID / Funding Opportunity Number	CFDA	Publish Date	Due Date	Program	Program Office	Status	Action
		15.615	02/06/2020	05/30/2020			Posted	View Unpost Grants.gov FIND not configured Preview View App Kit
		15.615	02/07/2020	05/31/2020			Posted	View Unpost Grants.gov FIND not configured Preview View App Kit Manage Intake Review Questions

Figure 8: Manage Announcements screen

Note: The *Manage Intake Review Questions* hyperlink displays in the Action column when Intake Review questions are enabled at the Funding Opportunity Level for a Grant Program. If the hyperlink does not display, please contact the GrantSolutions help desk at help@grantSolutions.gov.

6. Select the **Manage Intake Review Questions** hyperlink.

Manage Announcements

Fiscal Year (YYYY)

2020

Announcement Title

FR Document Number

Program

Program Office

-Please select a Program Office-

Grant Program

CFDA ⓘ

-Select a CFDA Number-Default All-

Search Options

☐ Past Due Announcements
☐ Pending Announcements

Search

Close

Add

Number of Announcements: 2

Announcement Title (Internal)	Competition ID / Funding Opportunity Number	CFDA	Publish Date	Due Date	Program	Program Office	Status	Action
		15.615	02/06/2020	05/30/2020			Posted	View Unpost Grants.gov FIND not configured Preview View App Kit
		15.615	02/07/2020	05/31/2020			Posted	View Unpost Grants.gov FIND not configured Preview Manage Intake Review Questions

Figure 9: Manage Announcements screen – Manage Intake Review Questions hyperlink

The *Manage Intake Review Questions* screen displays.

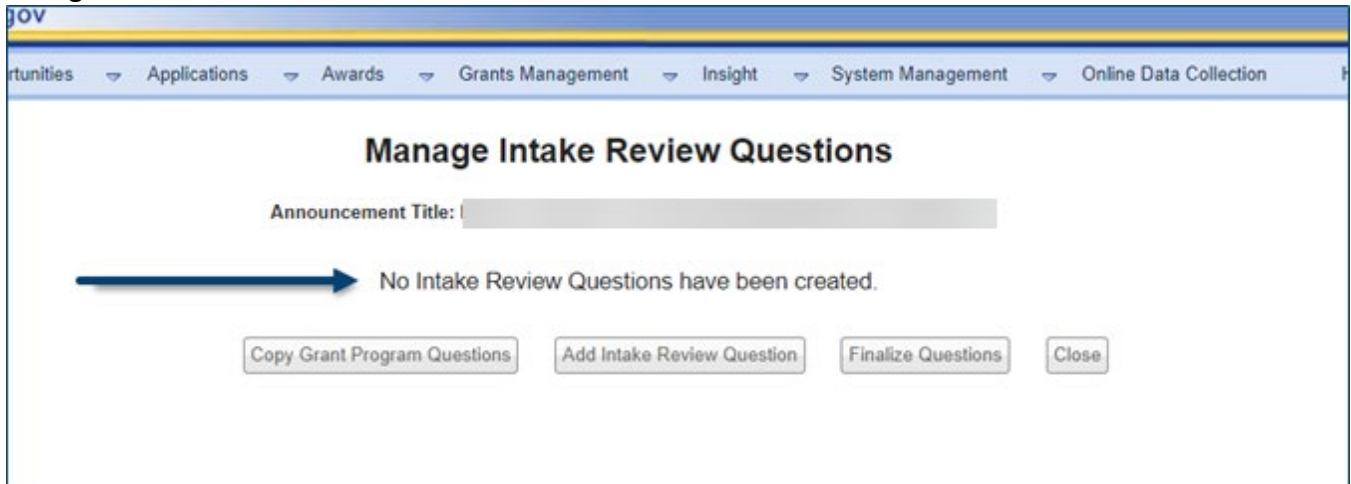
Figure 10: *Manage Intake Review Questions* screen

- To use the existing Intake Review questions already established for the Grant Program, select the **Copy Grant Program Questions** button.

Figure 11: *Manage Intake Review Questions - Copy Grant Program Questions*

Note: It is helpful to start with the Grant Program questions to make the process more efficient. Once copied, the questions can be edited, reordered, deleted, and new questions can be added.

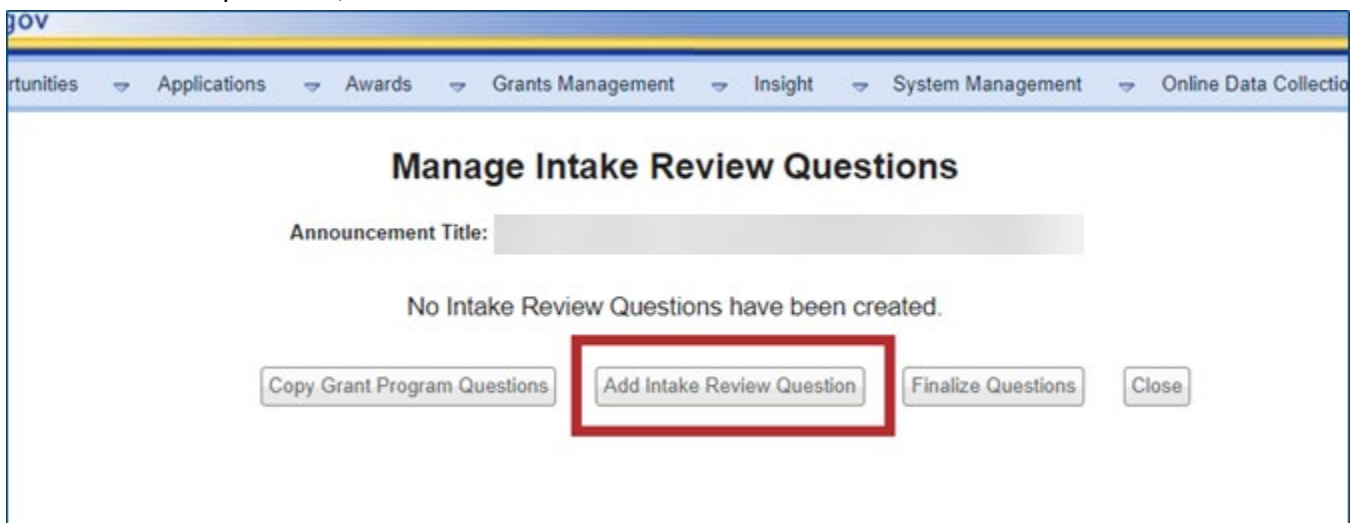
Note: If Intake Review questions do not exist for a Grant Program, the screen refreshes, and no changes are made.



The screenshot shows the 'Manage Intake Review Questions' screen. At the top, there is a navigation bar with links: Opportunities, Applications, Awards, Grants Management, Insight, System Management, and Online Data Collection. Below the navigation bar, the title 'Manage Intake Review Questions' is centered. Underneath the title, there is a text input field labeled 'Announcement Title:'. Below the input field, a blue arrow points to the message 'No Intake Review Questions have been created.' At the bottom of the screen, there are four buttons: 'Copy Grant Program Questions', 'Add Intake Review Question', 'Finalize Questions', and 'Close'.

Figure 12: Manage Intake Review Questions screen – “No Intake Review Questions have been created” message

8. To add new questions, select the **Add Intake Review Question** button.



This screenshot is similar to Figure 12, showing the 'Manage Intake Review Questions' screen. The 'Add Intake Review Question' button is highlighted with a red rectangular box. The other elements, including the navigation bar, title, input field, message, and other buttons, are the same as in Figure 12.

Figure 13: Manage Intake Review Questions screen – Add Intake Review Question button

The *Add Intake Review Question* screen displays.

GrantSolutions.gov

Grants List Funding Opportunities Applications Awards Grants Management Insight System Management

Add Intake Review Question

Announcement Title:

Question ★

(255 Maximum Characters) You have 255 characters remaining

Type

Required ☐

Figure 14: Add Intake Review Question screen

9. Enter the **text** of the required question in the Question box.

GrantSolutions.gov

Grants List Funding Opportunities Applications Awards Grants Management Insight System Management

Add Intake Review Question

Announcement Title:

Question ★

(255 Maximum Characters) You have 255 characters remaining

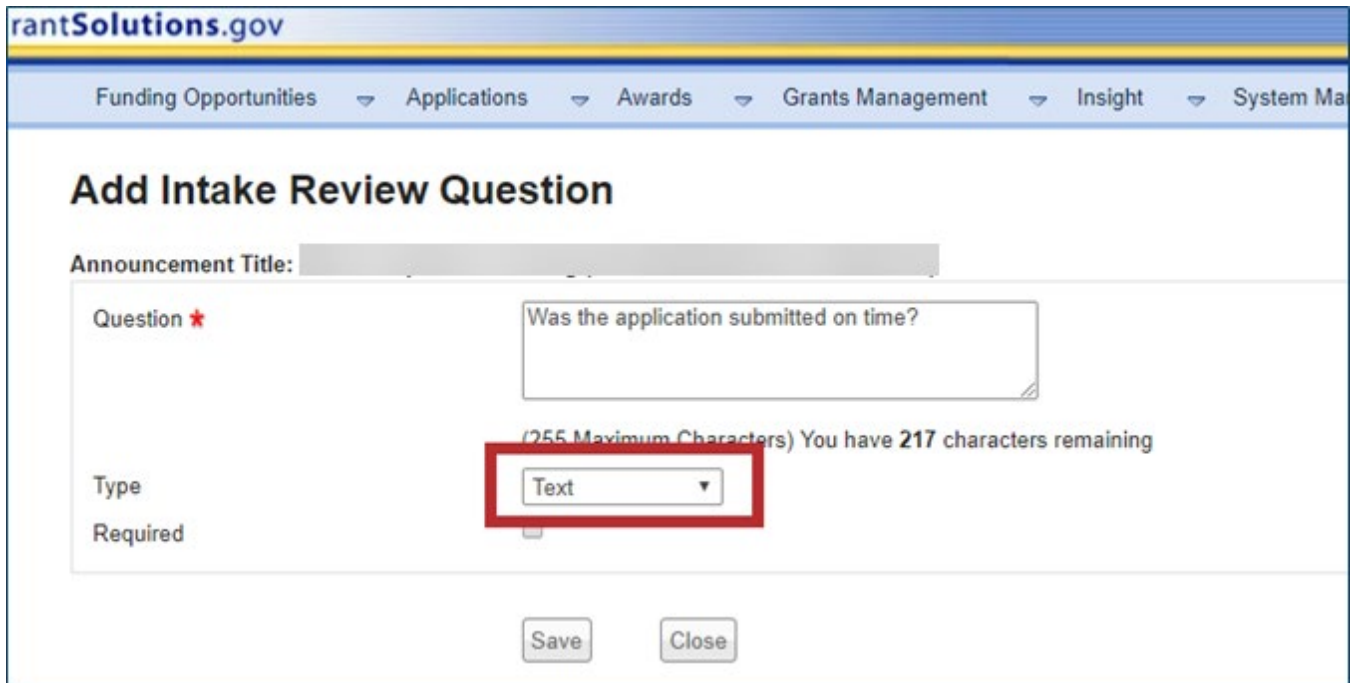
Type

Required ☐

Figure 15: Add Intake Review Question screen – Question text box

Note: There is a limit of 255 characters per question. If the 255 character limit is reached, the number counting underneath the text box will display, “You have 0 characters remaining”.

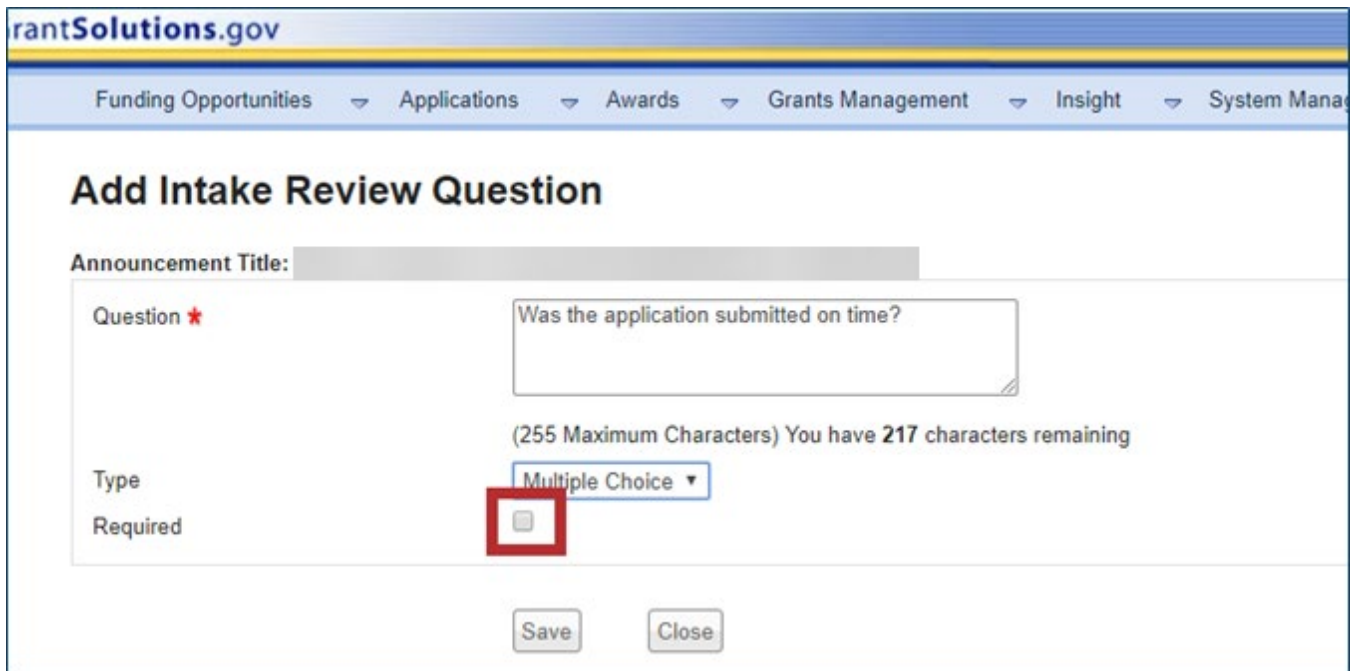
10. Select either **Text** or **Multiple Choice** from the *Type* drop-down list.



The screenshot shows the 'Add Intake Review Question' interface. At the top is a navigation bar with links: Funding Opportunities, Applications, Awards, Grants Management, Insight, and System Management. Below this is the title 'Add Intake Review Question'. There is a text input field for 'Announcement Title'. The main form area contains a 'Question' field with the text 'Was the application submitted on time?'. Below the question field is a character count: '(255 Maximum Characters) You have 217 characters remaining'. To the left of the question field are labels for 'Type' and 'Required'. The 'Type' dropdown menu is highlighted with a red box and shows 'Text' selected. At the bottom are 'Save' and 'Close' buttons.

Figure 16: Add Intake Review Question screen – Type drop-down list

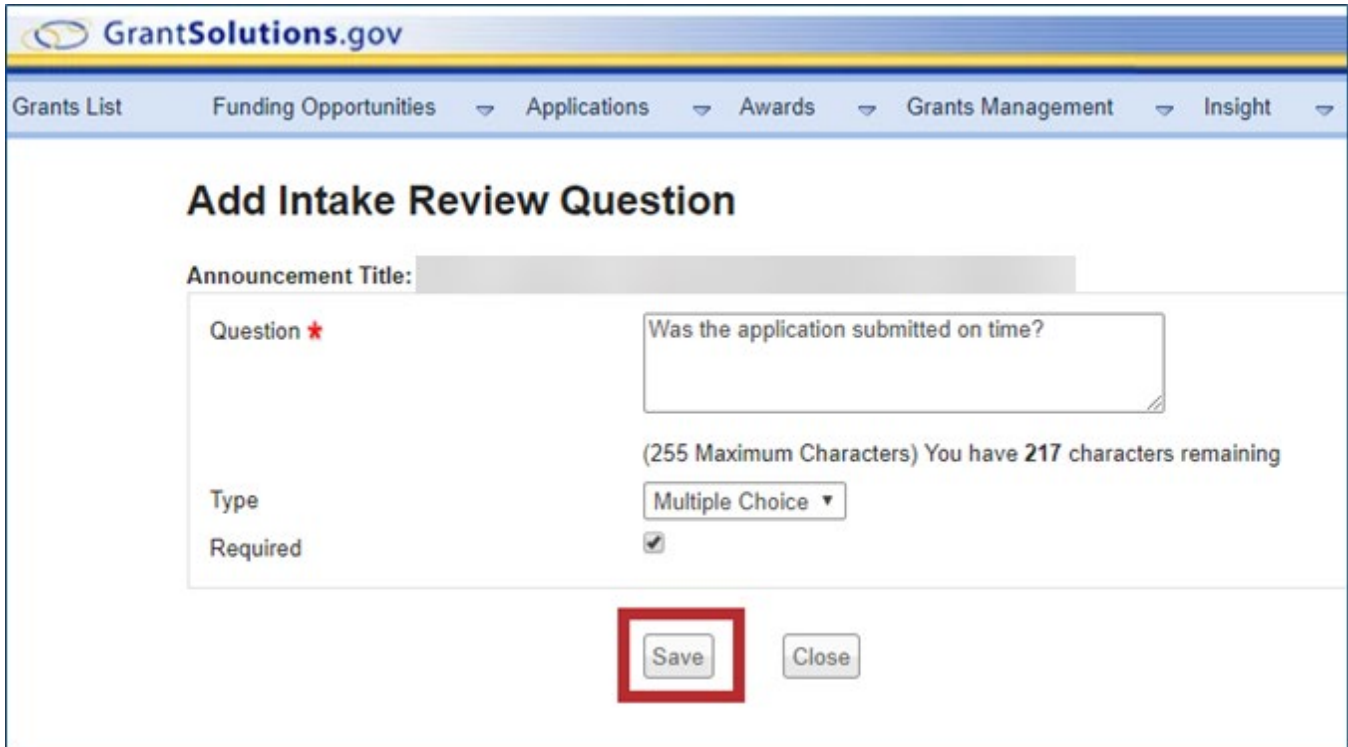
11. Select the **Required** checkbox to require an answer to a question.



This screenshot is similar to Figure 16, showing the 'Add Intake Review Question' interface. The 'Type' dropdown menu now shows 'Multiple Choice' selected. The 'Required' checkbox, located below the 'Type' dropdown, is highlighted with a red box. The 'Save' and 'Close' buttons remain at the bottom.

Figure 17: Add Intake Review Question screen – Required checkbox

12. Select the **Save** button.



GrantSolutions.gov

Grants List Funding Opportunities Applications Awards Grants Management Insight

Add Intake Review Question

Announcement Title:

Question ★

(255 Maximum Characters) You have **217** characters remaining

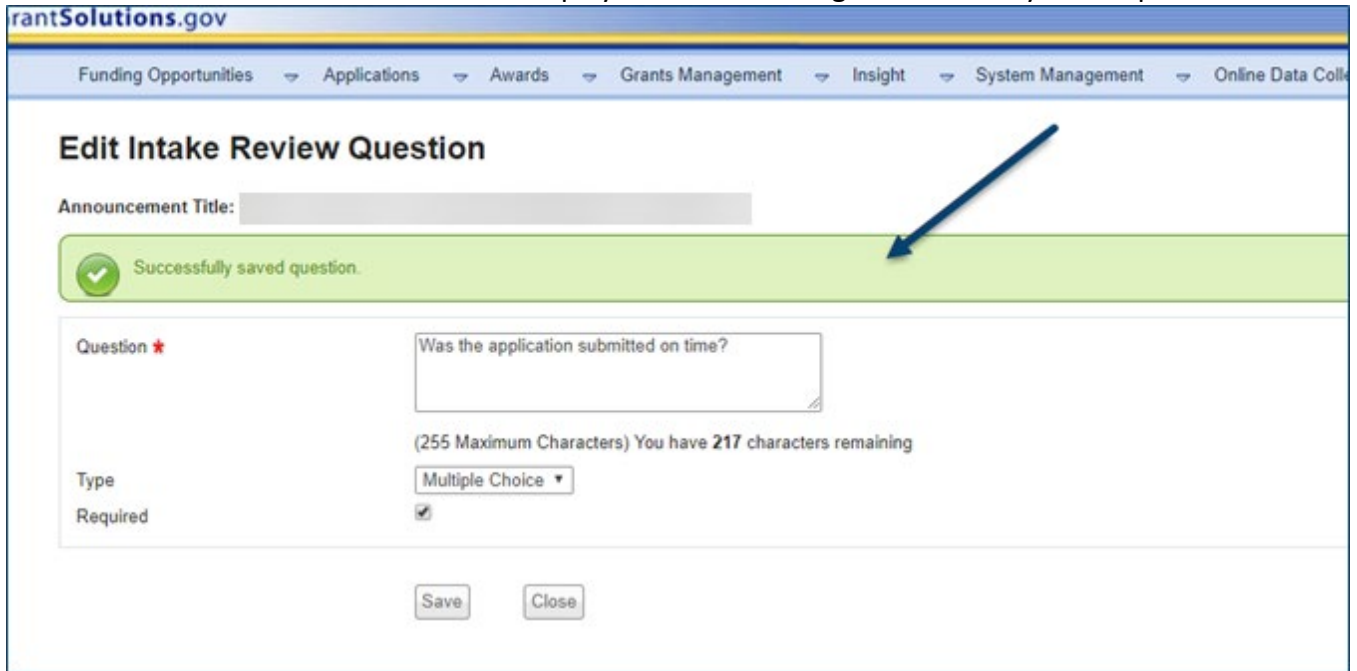
Type

Required ☒

Save

Figure 18: Add Intake Review Question screen – Save button

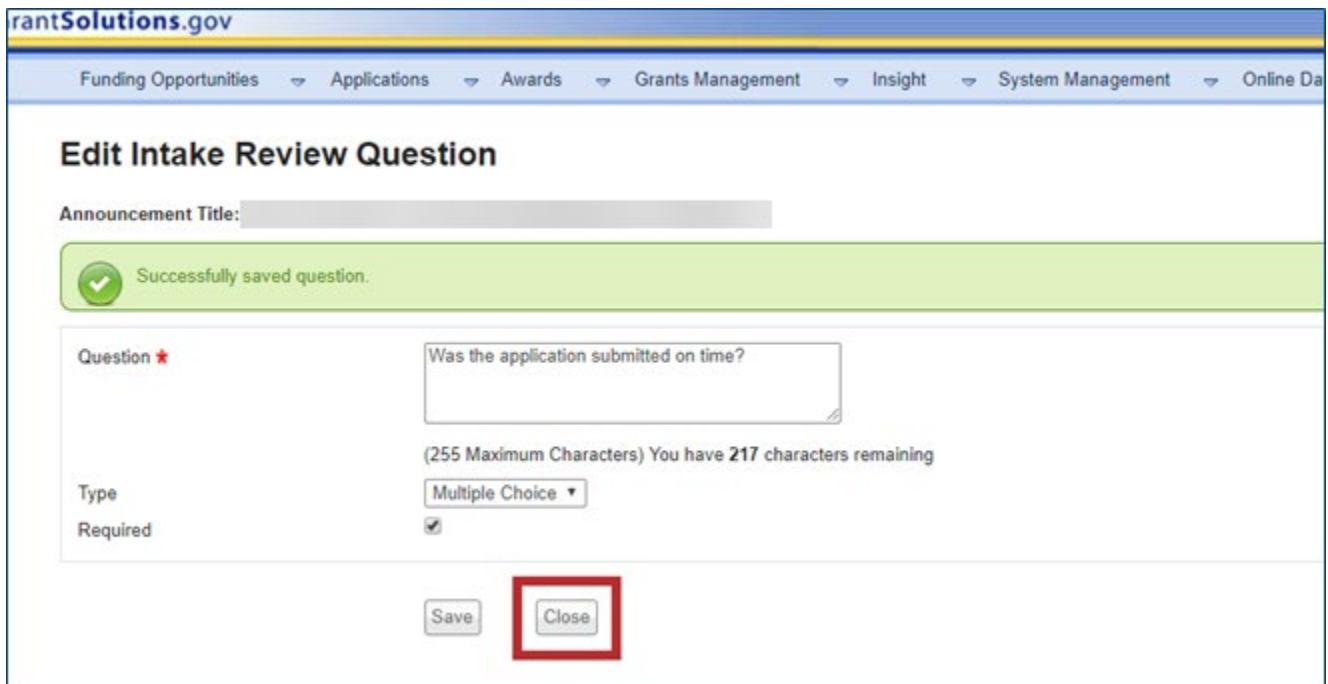
The *Edit Intake Review Question* screen displays with the message “Successfully saved question.”



The screenshot shows the 'Edit Intake Review Question' screen on the GrantSolutions.gov website. The page has a blue header with navigation links: Funding Opportunities, Applications, Awards, Grants Management, Insight, System Management, and Online Data Collection. Below the header, the title 'Edit Intake Review Question' is displayed. Underneath, there is a text input field for 'Announcement Title'. A green banner with a checkmark icon and the text 'Successfully saved question.' is prominently displayed. Below this, the 'Question' field contains the text 'Was the application submitted on time?'. A character count indicates '(255 Maximum Characters) You have 217 characters remaining'. The 'Type' is set to 'Multiple Choice' and the 'Required' checkbox is checked. At the bottom, there are 'Save' and 'Close' buttons. A blue arrow points to the success message banner.

Figure 19: Edit Intake Review Question screen – “Successfully saved question” message

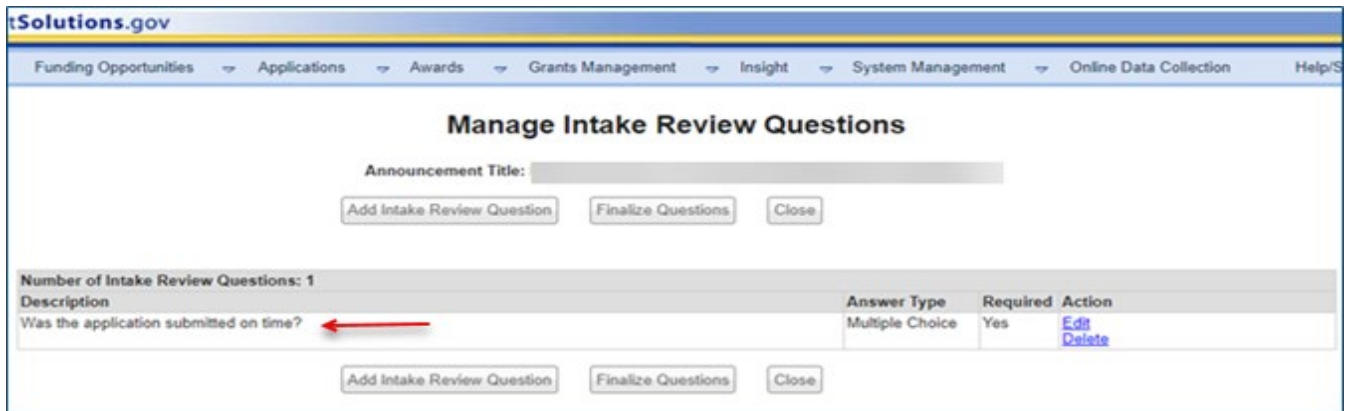
13. Select the **Close** button.



This screenshot is identical to the previous one, showing the 'Edit Intake Review Question' screen with the success message. However, the 'Close' button at the bottom right is highlighted with a red rectangular box, indicating the next step in the process.

Figure 20: Edit Intake Review Question screen – Close button

The *Manage Intake Review Questions* screen displays with the question added.



Manage Intake Review Questions

Announcement Title:

[Add Intake Review Question](#) [Finalize Questions](#) [Close](#)

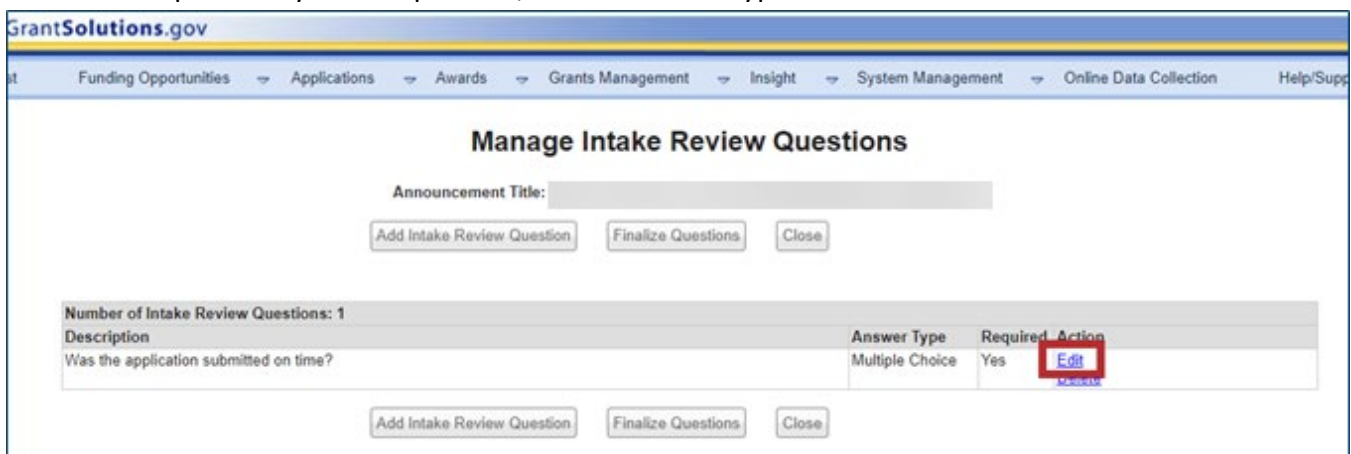
Number of Intake Review Questions: 1

Description	Answer Type	Required	Action
Was the application submitted on time?	Multiple Choice	Yes	Edit Delete

[Add Intake Review Question](#) [Finalize Questions](#) [Close](#)

Figure 21: Manage Intake Review Questions screen

14. To edit a previously added question, select the **Edit** hyperlink from the Action column.



Manage Intake Review Questions

Announcement Title:

[Add Intake Review Question](#) [Finalize Questions](#) [Close](#)

Number of Intake Review Questions: 1

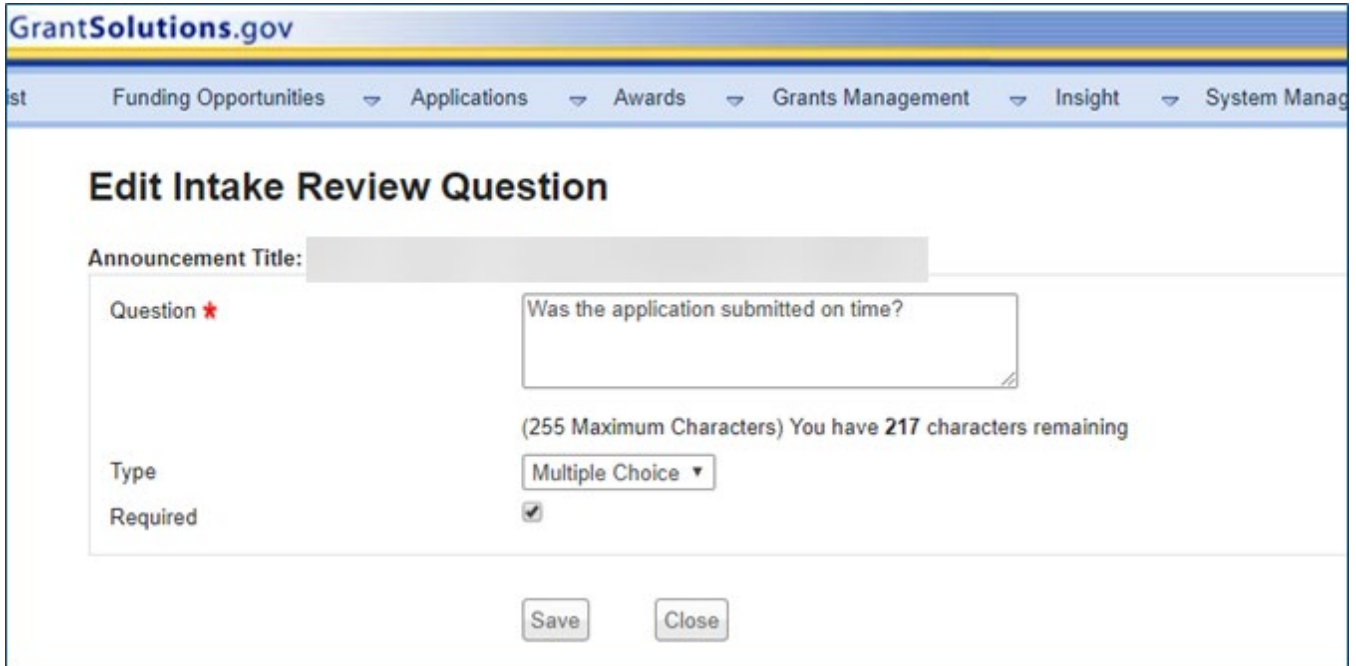
Description	Answer Type	Required	Action
Was the application submitted on time?	Multiple Choice	Yes	Edit Delete

[Add Intake Review Question](#) [Finalize Questions](#) [Close](#)

Figure 22: Manage Intake Review Questions screen - Edit hyperlink

Note: To remove a question, select the **Delete** hyperlink from the Action column.

The *Edit Intake Review Question* screen displays.



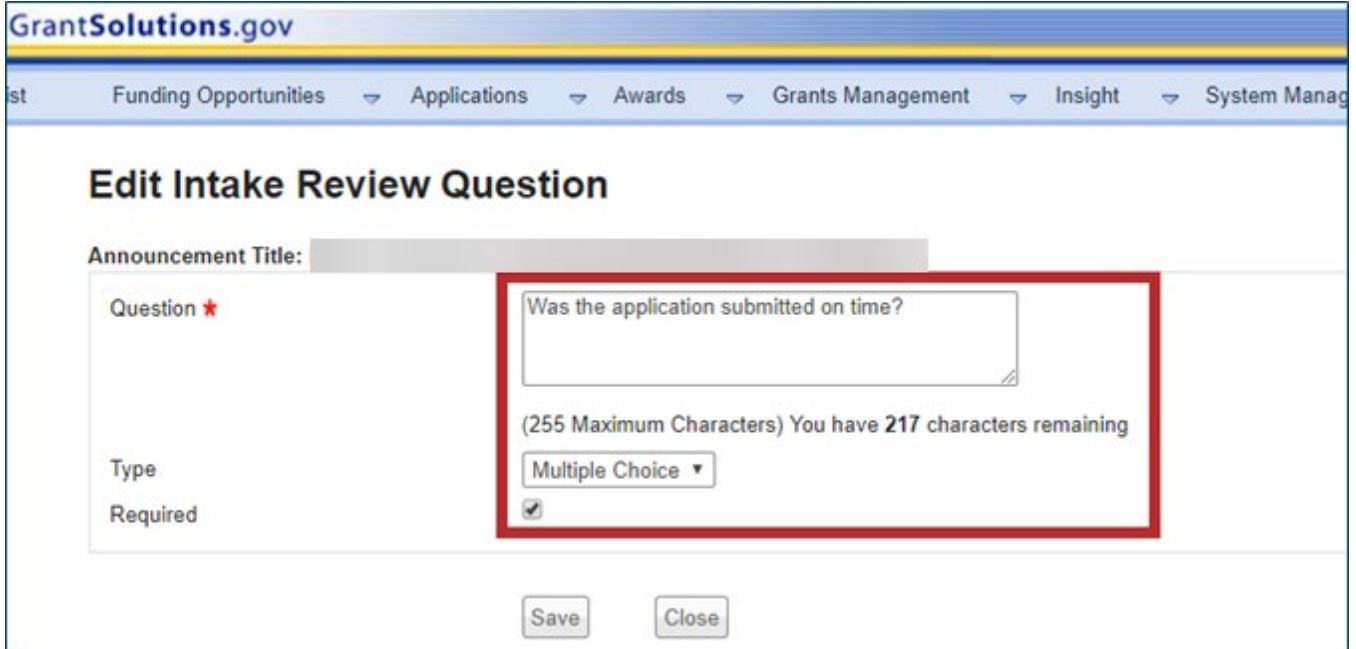
The screenshot shows the 'Edit Intake Review Question' screen in the GrantSolutions.gov system. The header includes the GrantSolutions.gov logo and a navigation menu with links: Funding Opportunities, Applications, Awards, Grants Management, Insight, and System Management. The main title is 'Edit Intake Review Question'. Below the title, there is a form with the following fields:

- Announcement Title:** A text input field with a greyed-out placeholder.
- Question ***: A text input field containing the text 'Was the application submitted on time?'. Below this field, a character count indicates '(255 Maximum Characters) You have 217 characters remaining'.
- Type**: A dropdown menu currently set to 'Multiple Choice'.
- Required**: A checkbox that is checked.

At the bottom of the form, there are two buttons: 'Save' and 'Close'.

Figure 24: Edit Intake Review Question screen

The Question, Type, and Required fields display with the previously added text or selections. Make updates as desired.



GrantSolutions.gov

st Funding Opportunities Applications Awards Grants Management Insight System Manag

Edit Intake Review Question

Announcement Title:

Question ★

Was the application submitted on time?

(255 Maximum Characters) You have **217** characters remaining

Type

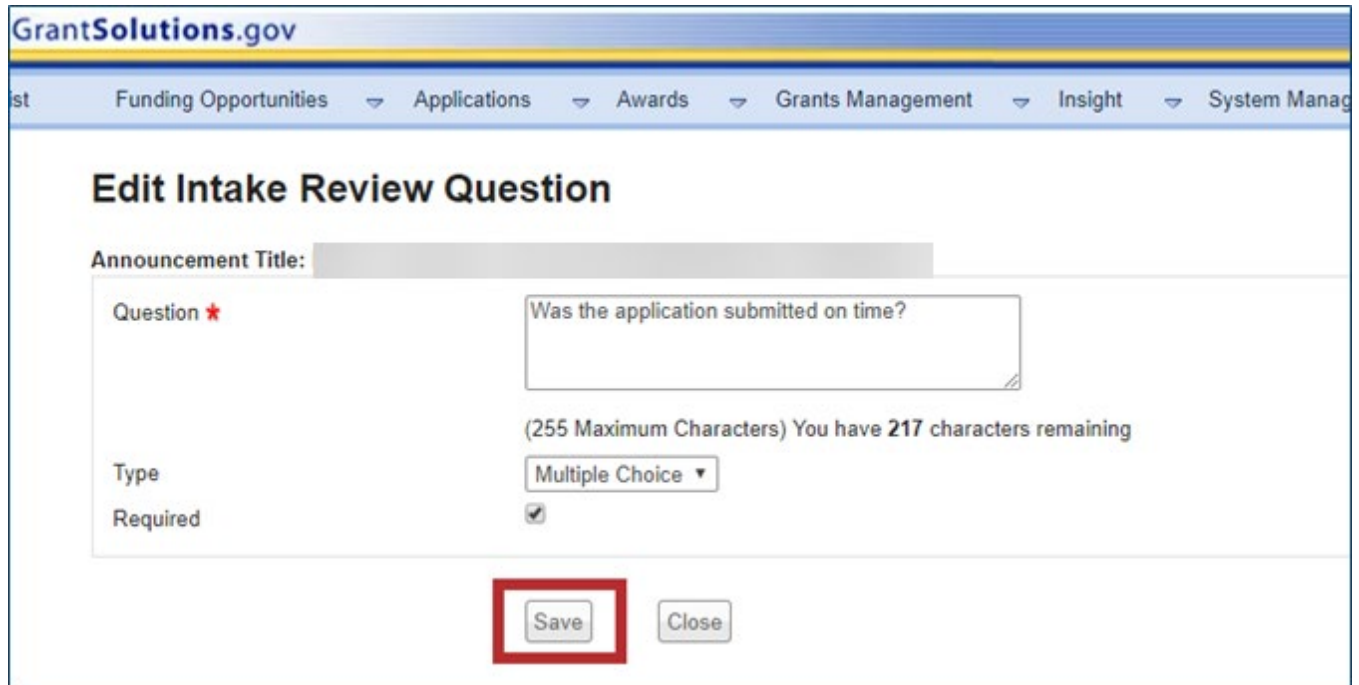
Multiple Choice ▼

Required ☒

Save Close

Figure 25: Edit Intake Review Question screen – Question text box, Type drop-down, and Required checkbox fields

15. Select the **Save** button.



GrantSolutions.gov

st Funding Opportunities Applications Awards Grants Management Insight System Manag

Edit Intake Review Question

Announcement Title:

Question ★

(255 Maximum Characters) You have 217 characters remaining

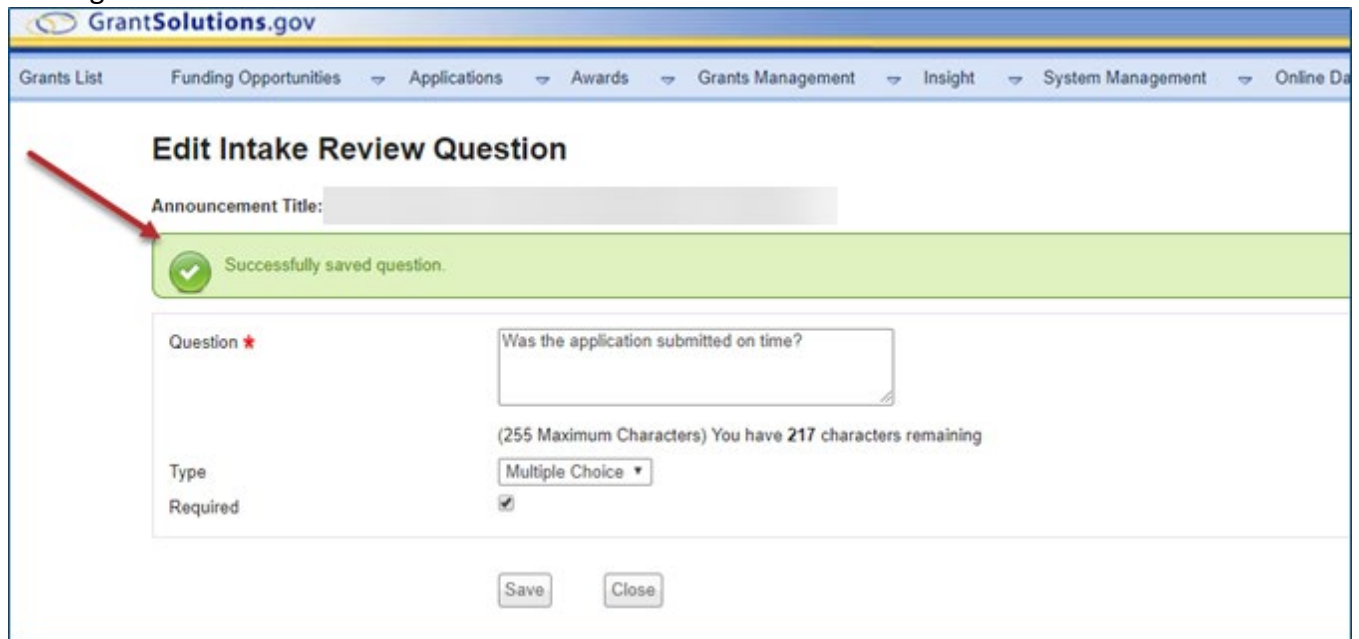
Type

Required ☒

Save

Figure 26: Edit Intake Review Question screen – Save button

The *Edit Intake Review Questions* screen displays the “Successfully saved question” confirmation message.



GrantSolutions.gov

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

Edit Intake Review Question

Announcement Title:

☒ Successfully saved question.

Question ★

(255 Maximum Characters) You have 217 characters remaining

Type

Required ☒

Figure 27: Edit Intake Review Question screen

16. Select the **Close** button.

GrantSolutions.gov

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

Edit Intake Review Question

Announcement Title: [Text Box]

✓ Successfully saved question.

Question ★ [Text Box: Was the application submitted on time?]

(255 Maximum Characters) You have 217 characters remaining

Type [Dropdown: Multiple Choice]

Required ☒

Save Close

Figure 28: Edit Intake Review Question screen – Close button

The *Manage Intake Review Questions* screen displays.

GrantSolutions.gov

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

Manage Intake Review Questions

Announcement Title: [Text Box]

Add Intake Review Question Finalize Questions Close

Number of Intake Review Questions: 1

Description	Answer Type	Required	Action
Was the application submitted on time?	Multiple Choice	Yes	Edit Delete

Add Intake Review Question Finalize Questions Close

Figure 29: Manage Intake Review Questions screen

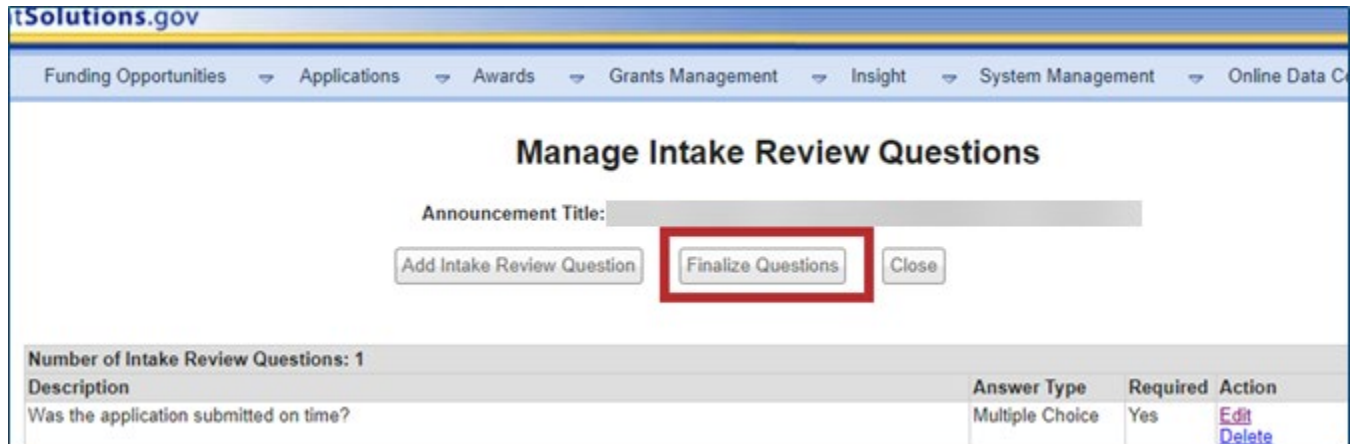
Note: Add additional questions to the Intake Review as needed.

FINALIZE QUESTIONS

Finalize the Intake Review questions when they are complete and ready to go live. Once finalized, they are available for use.

To finalize questions:

17. At the top of the *Manage Intake Review Questions* screen, select the **Finalize Questions** button.



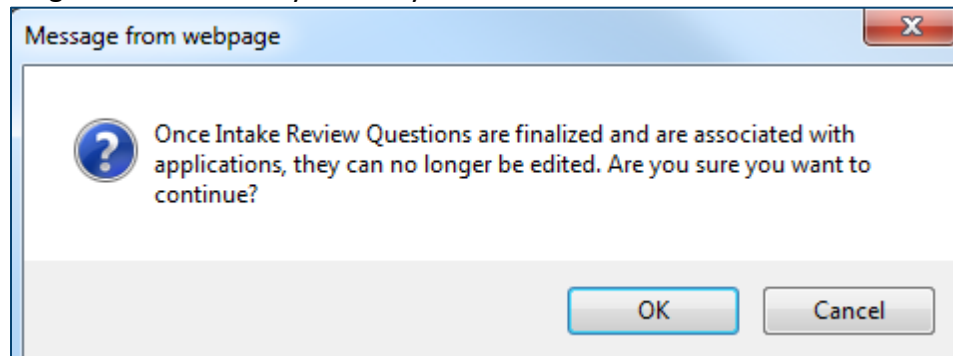
The screenshot shows the 'Manage Intake Review Questions' screen. At the top, there is a navigation bar with links: Funding Opportunities, Applications, Awards, Grants Management, Insight, System Management, and Online Data. Below the navigation bar, the title 'Manage Intake Review Questions' is centered. Underneath the title, there is a text input field for 'Announcement Title:'. Below this field, there are three buttons: 'Add Intake Review Question', 'Finalize Questions' (which is highlighted with a red box), and 'Close'. Below the buttons, there is a section titled 'Number of Intake Review Questions: 1'. Below this, there is a table with the following columns: Description, Answer Type, Required, and Action. The table contains one row with the description 'Was the application submitted on time?', Answer Type 'Multiple Choice', Required 'Yes', and Action links 'Edit' and 'Delete'.

Description	Answer Type	Required	Action
Was the application submitted on time?	Multiple Choice	Yes	Edit Delete

Figure 30: Manage Intake Review Questions screen – Finalize Questions button

Note: Finalize questions before the Intake Review process begins.

The “Once Intake Review Questions are finalized and are associated with applications, they can no longer be edited. Are you sure you want to continue?” confirmation message displays.



The screenshot shows a confirmation message dialog box. The title bar says 'Message from webpage'. Inside the dialog, there is a question mark icon followed by the text: 'Once Intake Review Questions are finalized and are associated with applications, they can no longer be edited. Are you sure you want to continue?'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

Figure 31: Confirmation Message

18. Select **OK** to continue or **Cancel** to return to the previous screen.

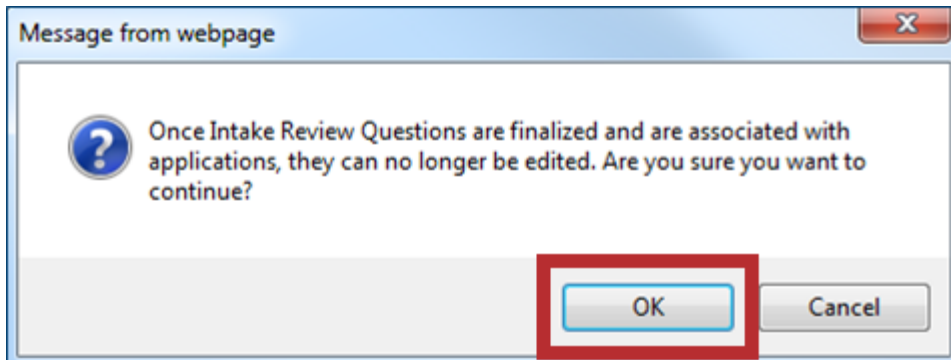


Figure 32: Confirmation Message – OK button

The *Manage Intake Review Questions* screen displays, the screen is read-only.

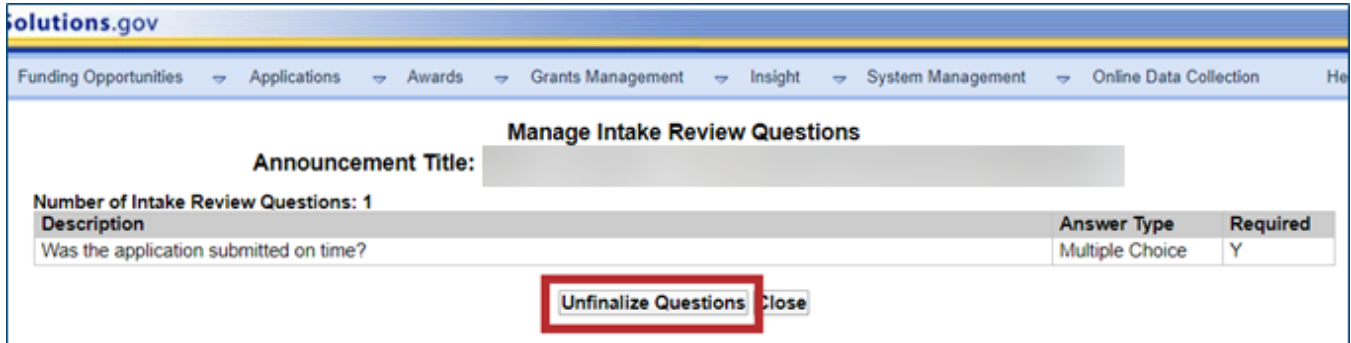
Description	Answer Type	Required
Was the application submitted on time?	Multiple Choice	Y

At the bottom of the screen, there are two buttons: 'Unfinalize Questions' and 'Close'.

Figure 33: Manage Intake Review Questions – Finalized Questions

Note: Questions can only be unfinalized and updated before the *Intake Review* screen is opened for an Application associated with the Announcement. Once the Intake Review icon is selected from the Application Receipt and Logging screen, the Intake Review questions can no longer be modified.

19. To make additional changes to the Intake Review Questions, select the **Unfinalize Questions** button.



The screenshot shows the 'Manage Intake Review Questions' screen. At the top, there is a navigation bar with links: Funding Opportunities, Applications, Awards, Grants Management, Insight, System Management, Online Data Collection, and Help. Below the navigation bar, the title 'Manage Intake Review Questions' is displayed. Underneath, there is a field for 'Announcement Title:'. Below that, it says 'Number of Intake Review Questions: 1'. A table lists the questions:

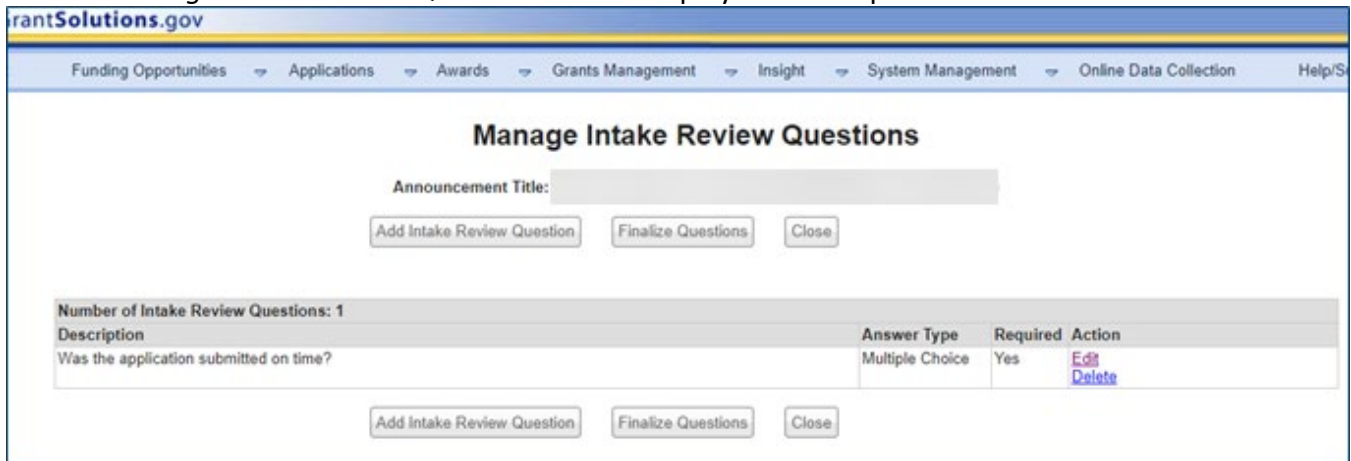
Description	Answer Type	Required
Was the application submitted on time?	Multiple Choice	Y

At the bottom of the table, there are two buttons: 'Unfinalize Questions' (highlighted with a red box) and 'Close'.

Figure 34: Manage Intake Review Questions screen - Unfinalize Questions button

Note: The **Unfinalize Questions** button is no longer available after selecting the Intake Review icon for an Application associated with the Announcement.

20. The *Manage Intake Review Questions* screen displays and the questions are editable.



The screenshot shows the 'Manage Intake Review Questions' screen. At the top, there is a navigation bar with links: Funding Opportunities, Applications, Awards, Grants Management, Insight, System Management, Online Data Collection, and Help/S. Below the navigation bar, the title 'Manage Intake Review Questions' is displayed. Underneath, there is a field for 'Announcement Title:'. Below that, there are three buttons: 'Add Intake Review Question', 'Finalize Questions', and 'Close'. Below these buttons, it says 'Number of Intake Review Questions: 1'. A table lists the questions:

Description	Answer Type	Required	Action
Was the application submitted on time?	Multiple Choice	Yes	Edit Delete

At the bottom of the table, there are three buttons: 'Add Intake Review Question', 'Finalize Questions', and 'Close'.

Figure 35: Manage Intake Review Questions screen

Note: Once questions are re-finalized, the Intake Review process can begin.