GrantSolutions User Guide

APPLICATION RECOMMENDATION ACTIONS

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APPLICATION RECOMMENDATION ACTIONS

After an application is marked as eligible during the Intake Review and after the Merit Review is completed (when applicable), use the *Application Recommendation* screen to assign a recommended funding decision and funding level.

Applications with an approved status advance to the funded list, while applications with an approved-unfunded, deferred, disapproved, or not selected for funding status remain unfunded.

Note: Federal staff with one of the following system roles can perform Application Recommendation actions in the GrantSolutions Grants Management Services (GMM):

- Program Officer (PO)
- Administrative Director (AD)
- Program Coordinator (PC)
- Office Director (OD)
- Authorizing Official (AO)

PERFORM APPLICATION RECOMMENDATION ACTIONS

To search for applications associated with a specific announcement, perform the following steps:

1. From the "Grants List" screen, click the **Applications** drop-down and select the **Application Recommendation** option.

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

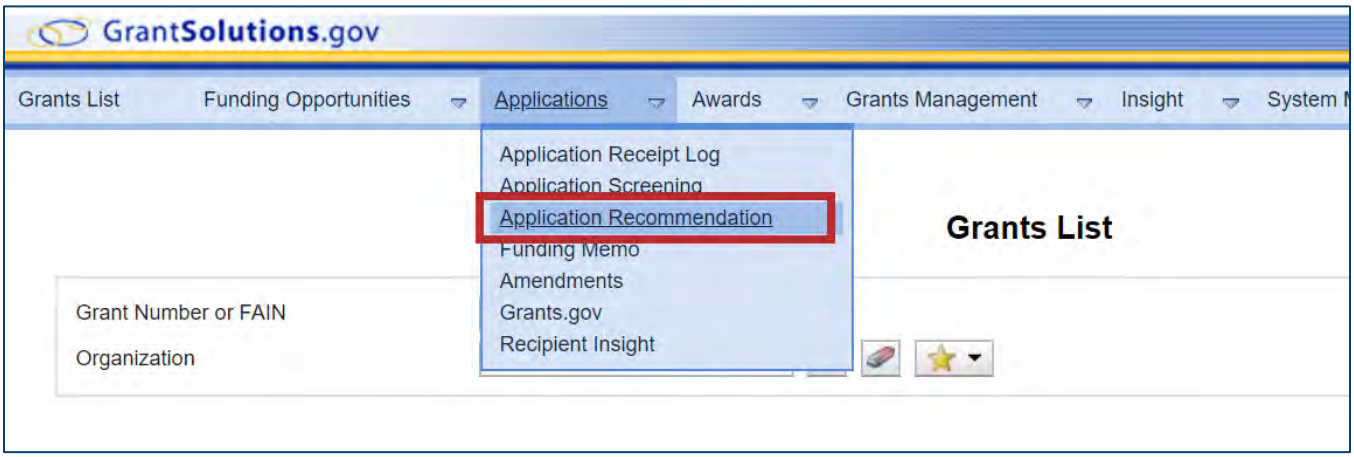

Figure 1: GrantSolutions GMM menu bar - Applications

The *Application Recommendation* screen displays.

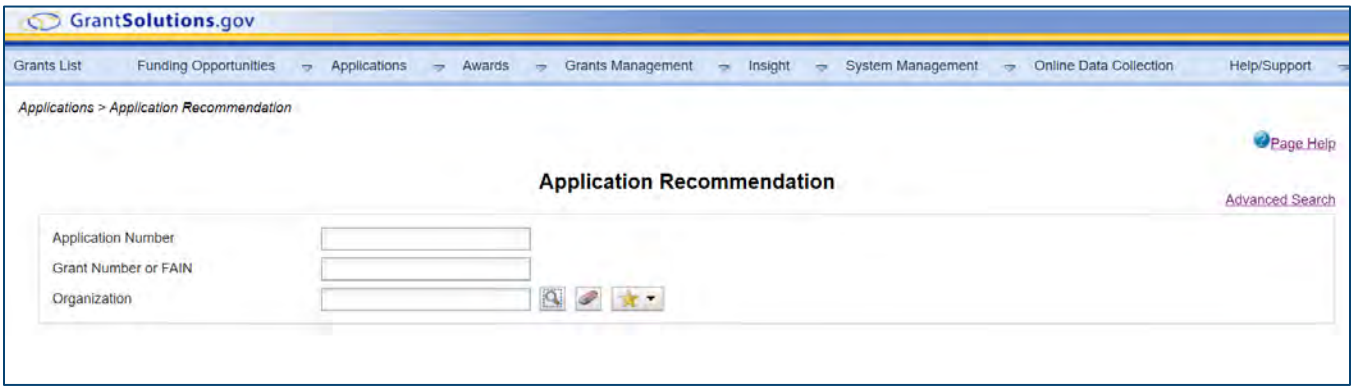

Figure 2: Application Recommendation screen

2. From the *Application Recommendation* screen's Simple Search view, select the **Advanced Search** hyperlink.

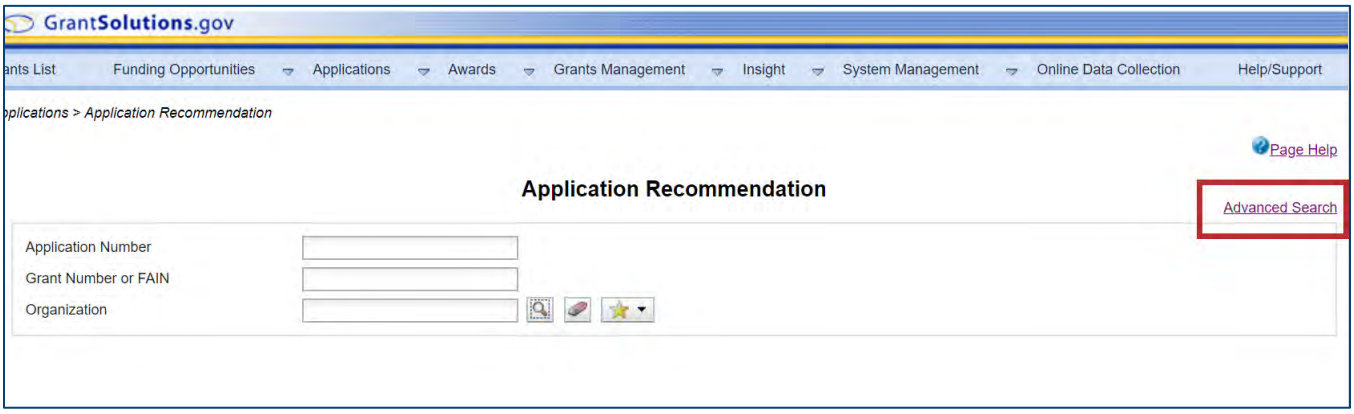

Figure 3: Application Recommendation Simple Search view - Advanced Search hyperlink

The *Advanced Search* view displays.

Note: Criteria and filters can be re-added to the Default / Selected Search Criteria box by selecting options from the **Search Criteria** icon and the **filter** drop-down arrow.

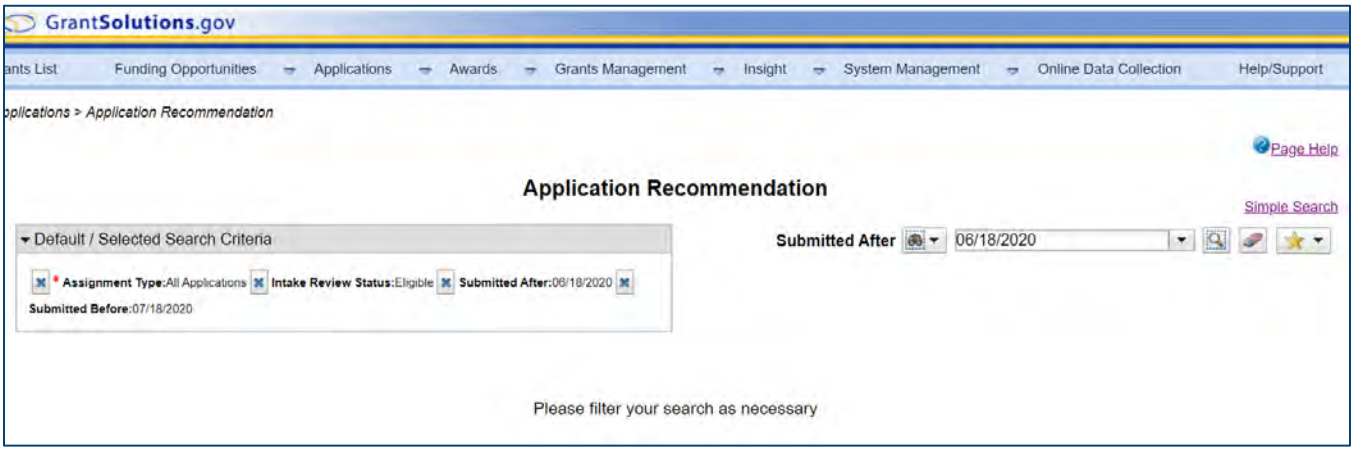

Figure 4: Application Recommendation Advanced Search view

3. Click the **Search Criteria** drop-down icon.

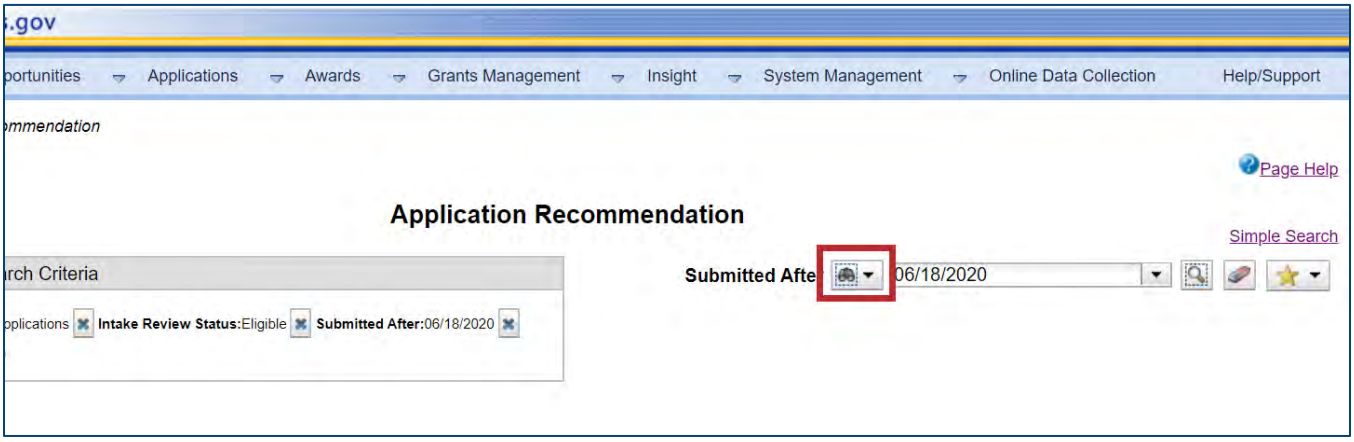

Figure 5: Application Recommendation Advanced Search view - Search Criteria icon

4. Select the **Announcement** option from the drop-down list.

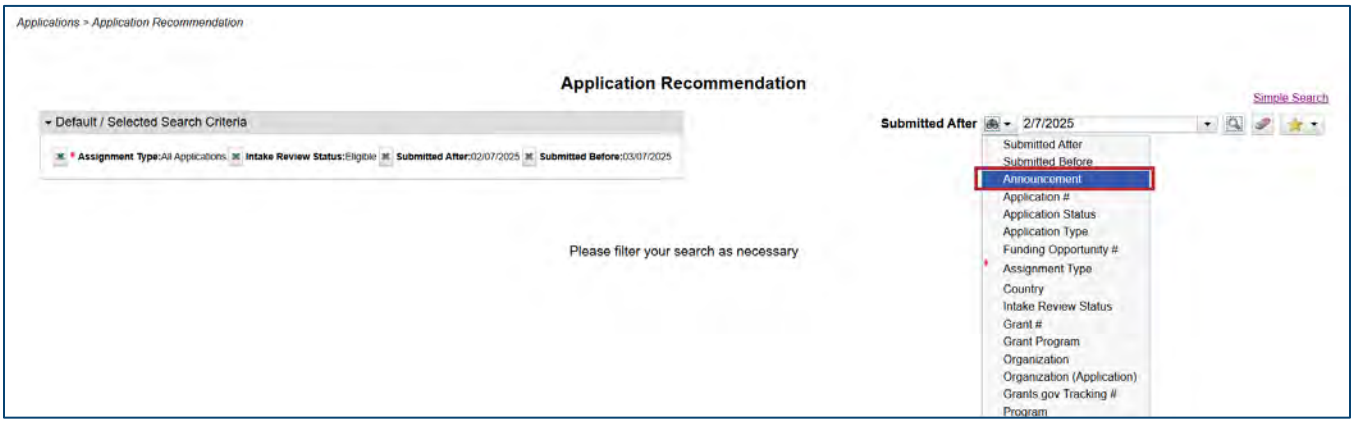

Figure 6: Application Recommendation screen with Announcement option

5. Click the **filter** drop-down arrow.

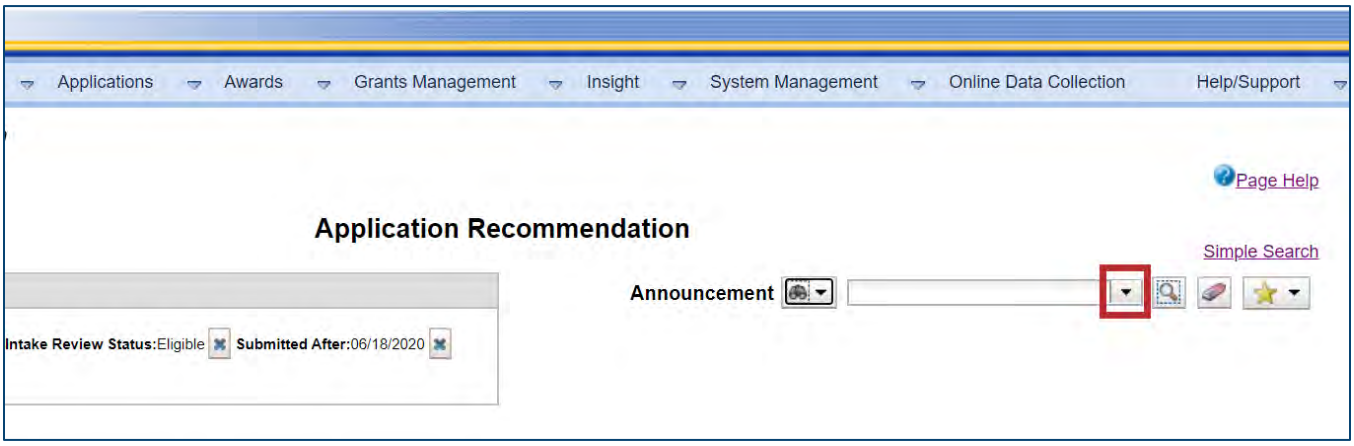

Figure 7: Application Recommendation Advanced Search view - Filter drop-down arrow

6. Select the **announcement name** from the drop-down list.

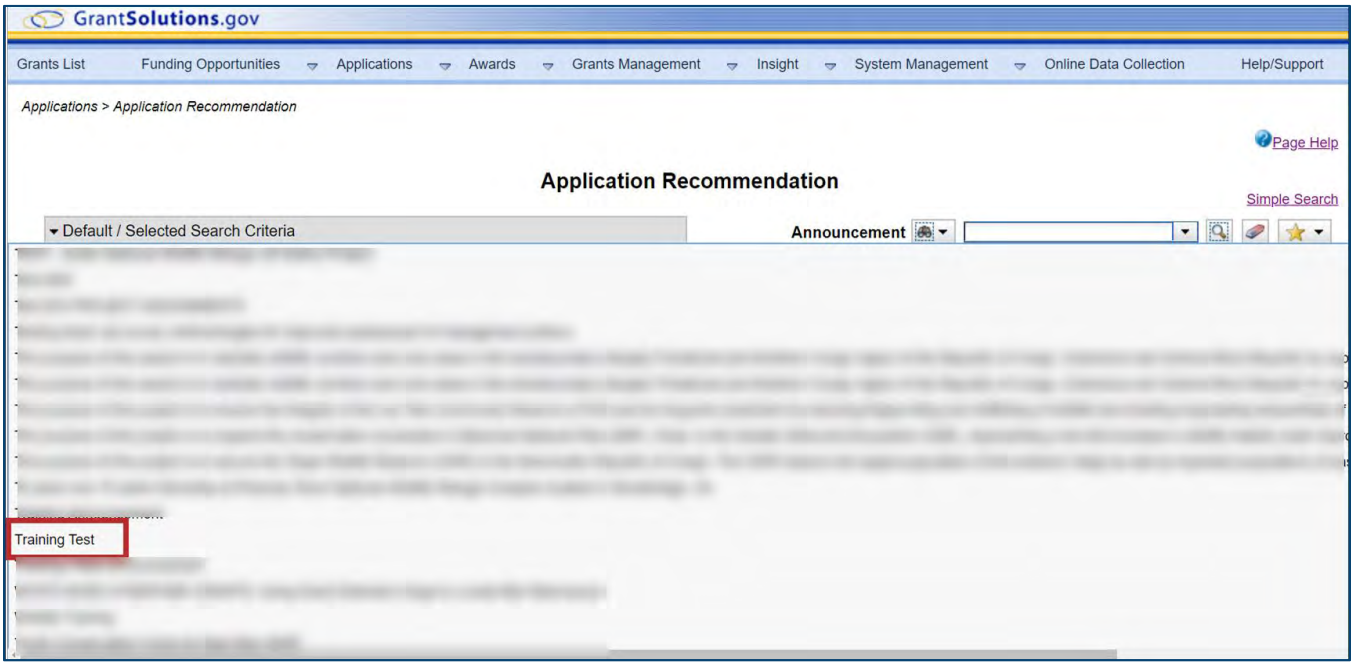

Figure 8: Application Recommendation screen with announcement name option

7. Click the **Search** icon.

Note: The new search criteria are in the *Default/Selected Search Criteria* box.

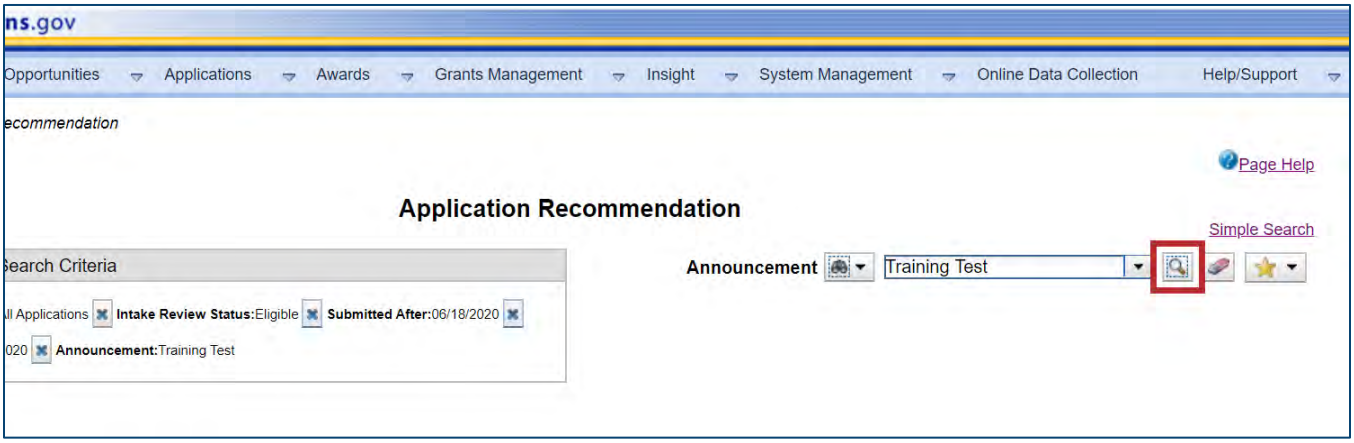

Figure 9: Application Recommendation Advanced Search view - Search icon

The results table displays.

Note: Due to the amount of information in the results table, it is necessary to scroll horizontally to the right to view all columns. The *Application Number* and *Organization* columns are frozen as the user navigates the table.

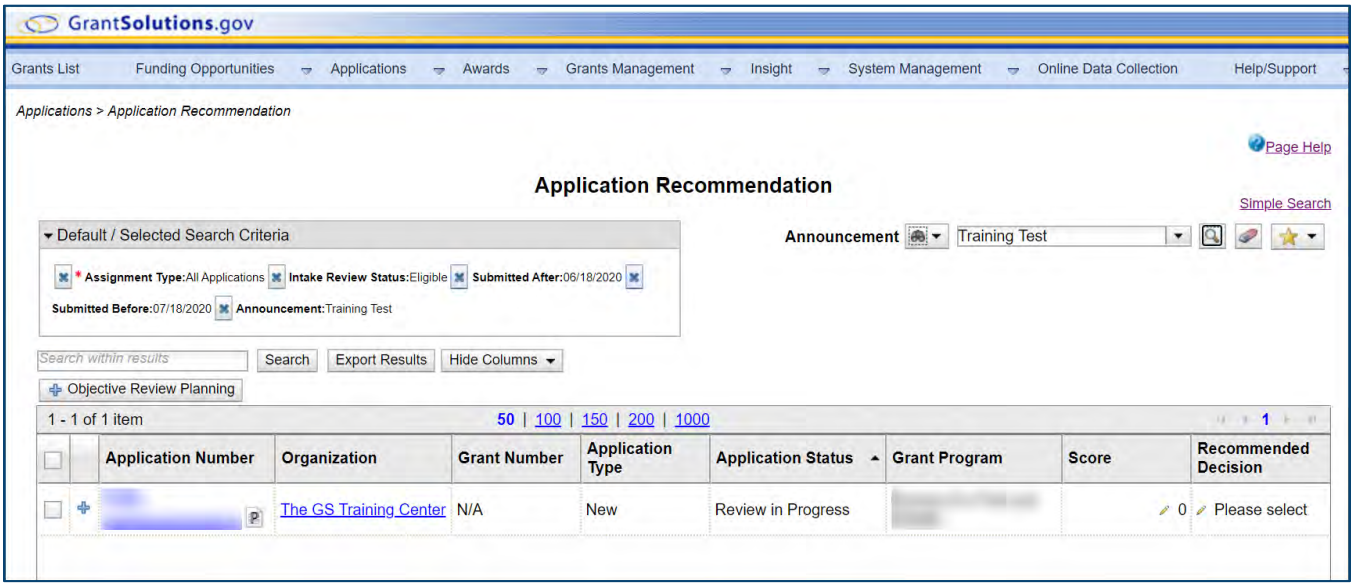

Figure 10: Application Recommendation screen

COMPETITIVE ANNOUNCEMENTS: ENTER SCORE

When applications undergo a review for a competitive announcement, it is common for scores to be entered in the Results table's Score column. It is not necessary to enter scores for applications associated with non-competitive announcements. Entering scores in GrantSolutions GMM is optional.

To enter a score, follow the steps below:

1. From the results table, select the **Edit** icon in the *Score* field.

Note: The *Edit* icon indicates an editable field. If the *Edit* icon does not display, please verify that the application has the correct status (Review in Progress), that the Funding Memo is not created, and that the user has the PO, AD, PC, OD, or AO system role.

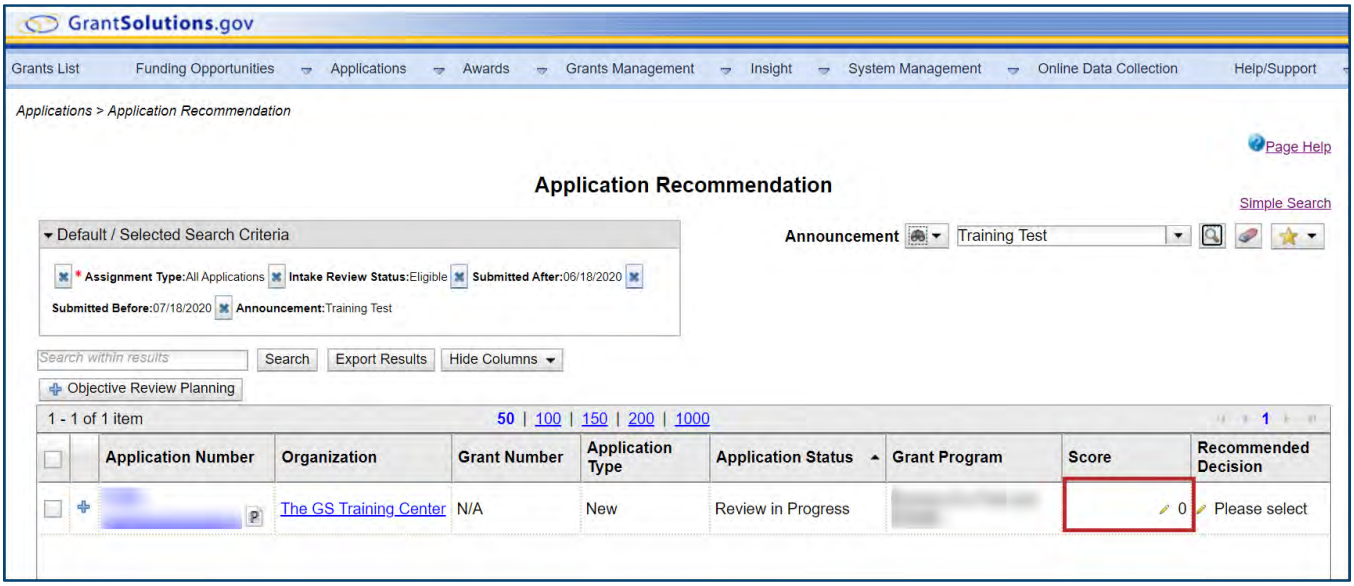

Figure 11: Application Recommendation screen with Score field and edit icon

2. Enter the **score** in the *Score* field.

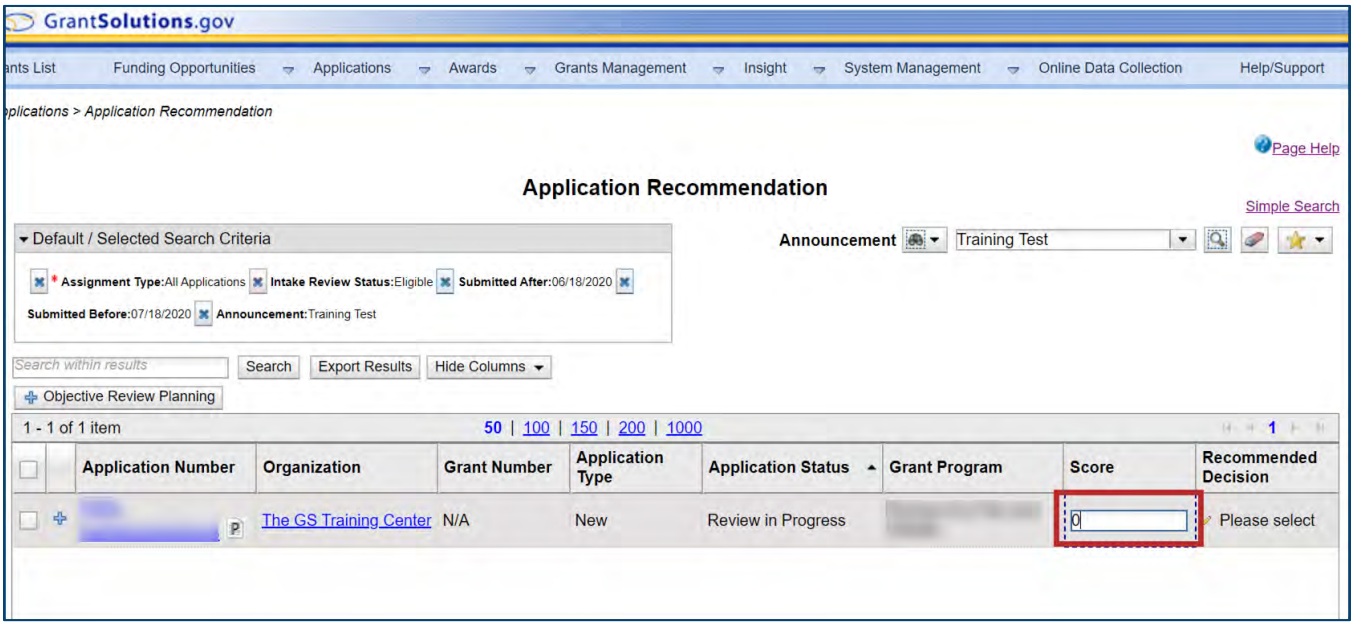

Figure 12: Application Recommendation screen with Score field

3. Select the **Save** button at the bottom of the screen.

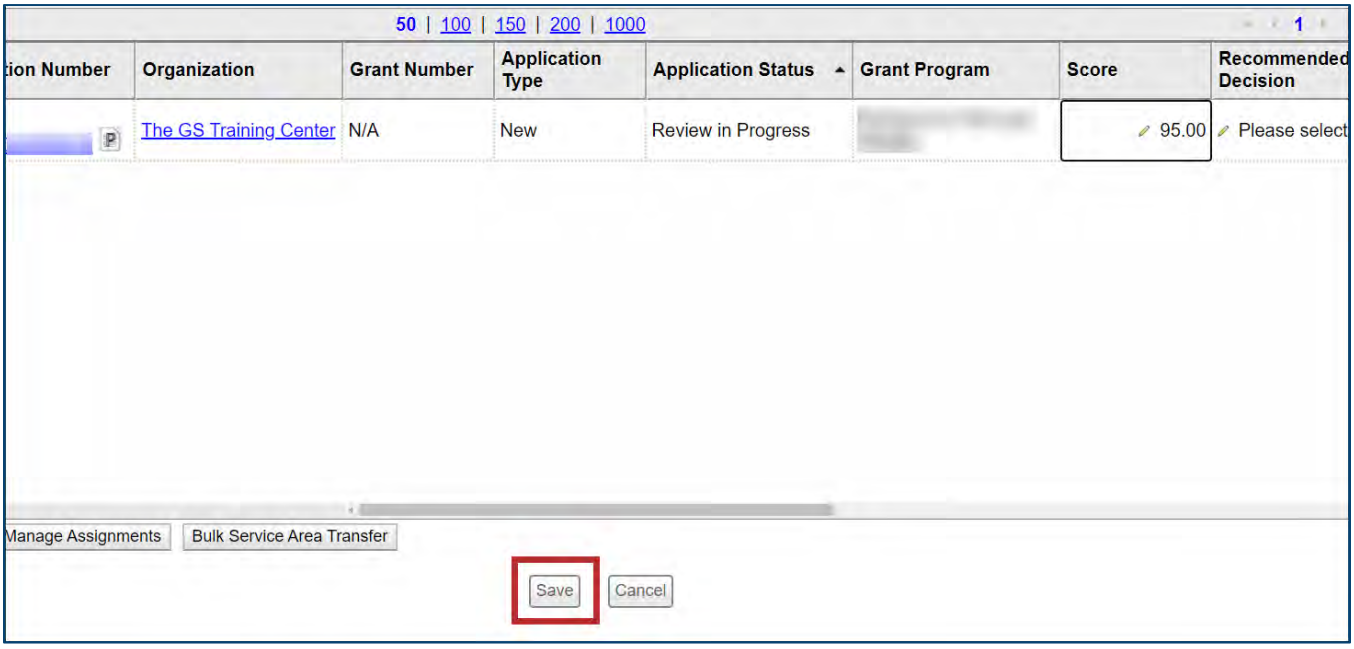

Figure 13: Application Recommendation screen with Save button

The confirmation message "Changes saved successfully" displays above the *Advanced Search* section.

Note: Although it is recommended to save frequently, it is not required to select save on the "Application Recommendation" screen until all actions are complete.

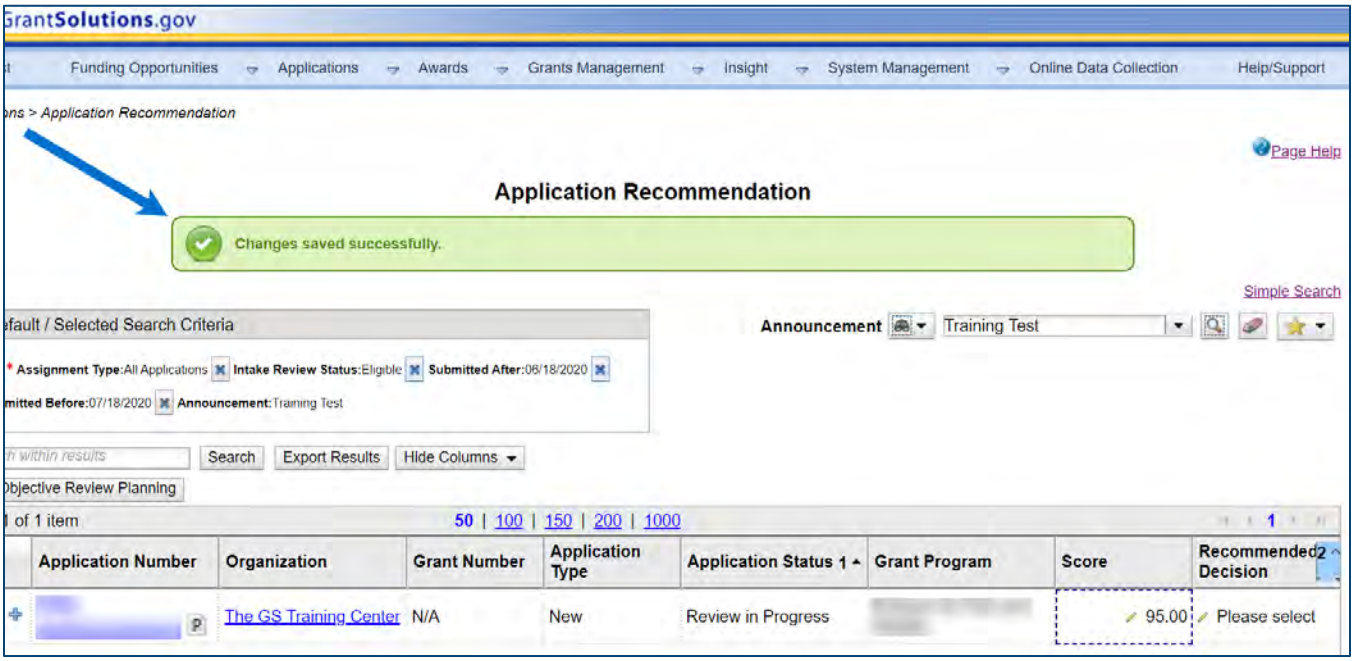

Figure 14: Application recommendation screen with Changes saved successfully message

ASSIGN A DECISION STATUS

The recommended decision determines whether an application is approved for funding. The only decision status that allows an application to move forward to creating the funding memo is approved. Scores are not required to select a recommended decision.

To assign a decision status to an application follow the steps below:

1. Scroll to the right and select the **Edit** icon in the *Recommended Decision* column.

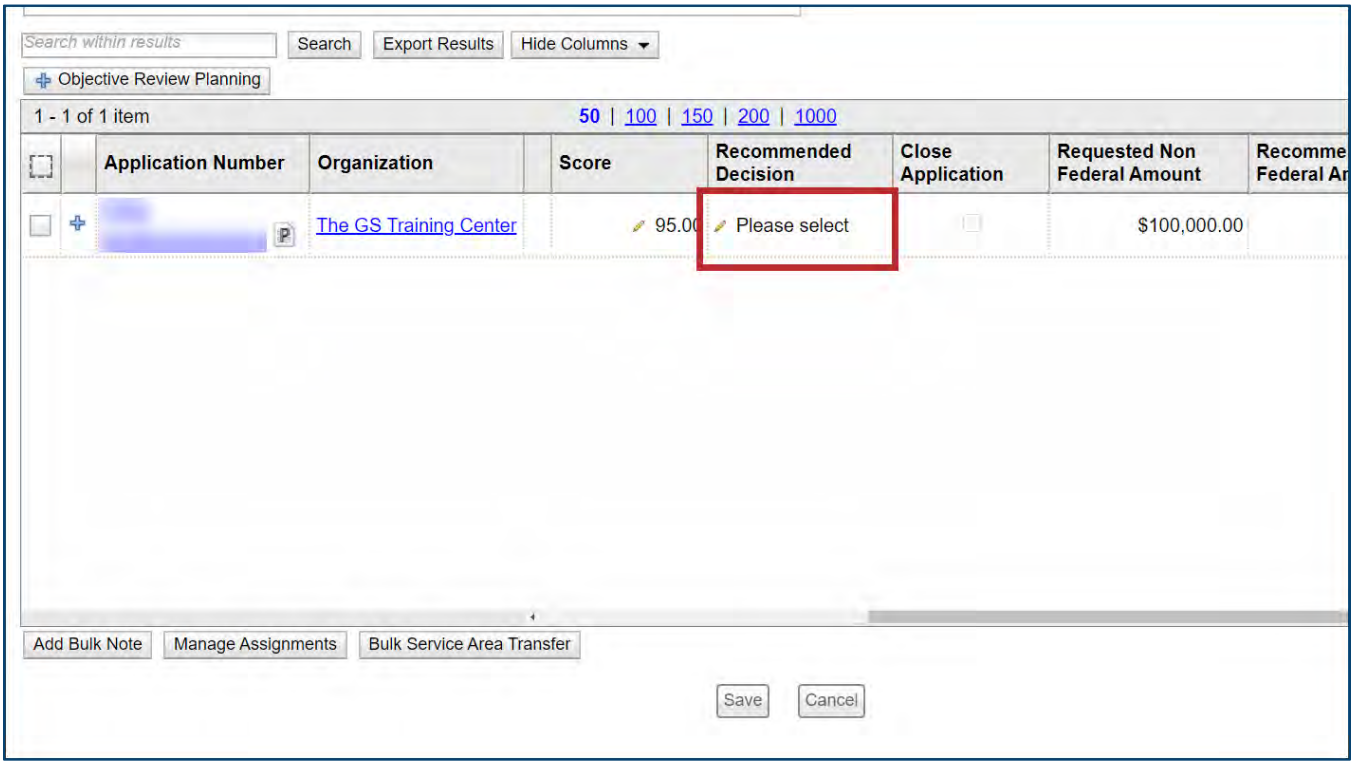

Figure 15: Application Recommendation screen with Recommended Decision column and edit icon

2. Select one of the following decisions from the drop-down list:

- *Approved* - The application moves forward in the application approval process.
- *Approved-Unfunded* - The application is approved, but the funds are not available for disbursement. The application does not move forward in the application approval process.
- *Deferred* - The application is approved, but the funds are not available for disbursement. The application does not move forward in the application approval process.
- *Disapproved* - The application was not approved. The application does not move forward in the application approval process.
- *Not Selected for Funding* - The application was approved but was not selected for funding. The application does not move forward in the application approval process.

Note: Only Approved moves the application forward in the approval process.

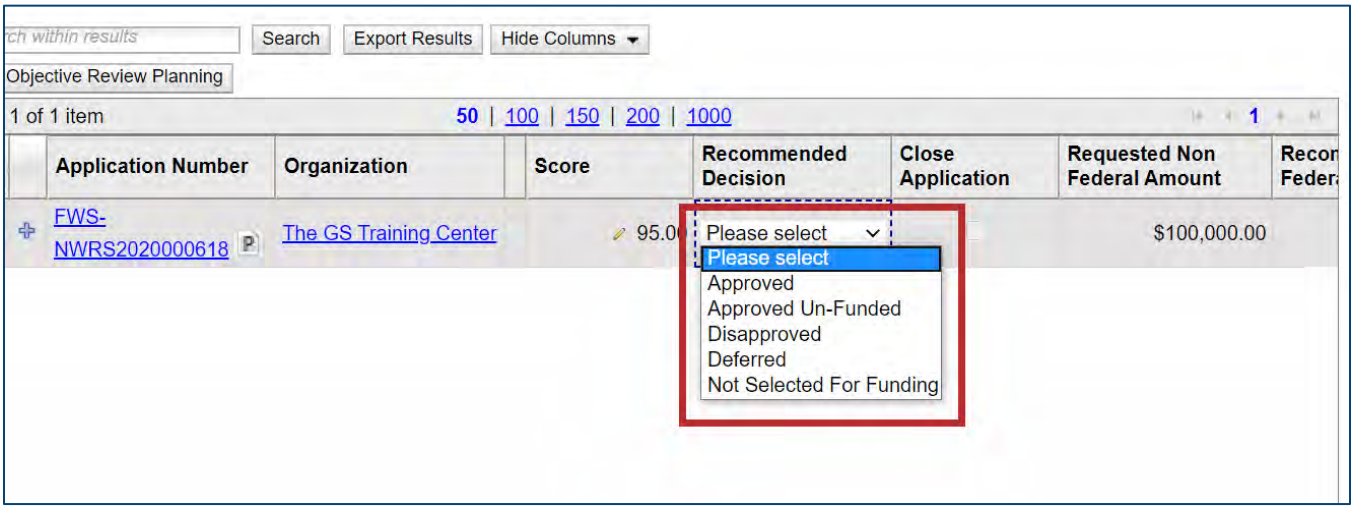

Figure 16: Application Recommendation screen Results table - Recommended Decision statuses

3. Click the **Save** button at the bottom of the screen.

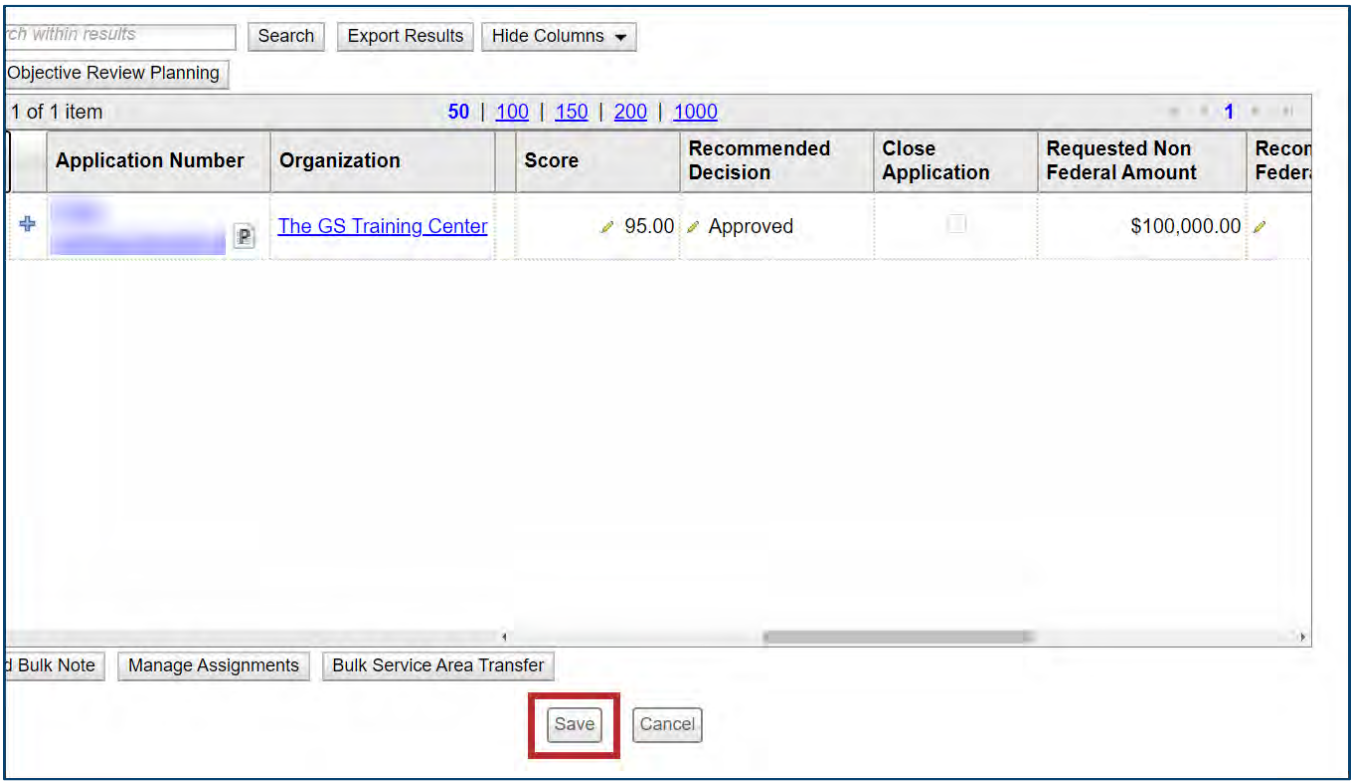

Figure 17: Application Recommendation screen with Save button

The confirmation message "Changes saved successfully" displays above the *Advanced Search* section.

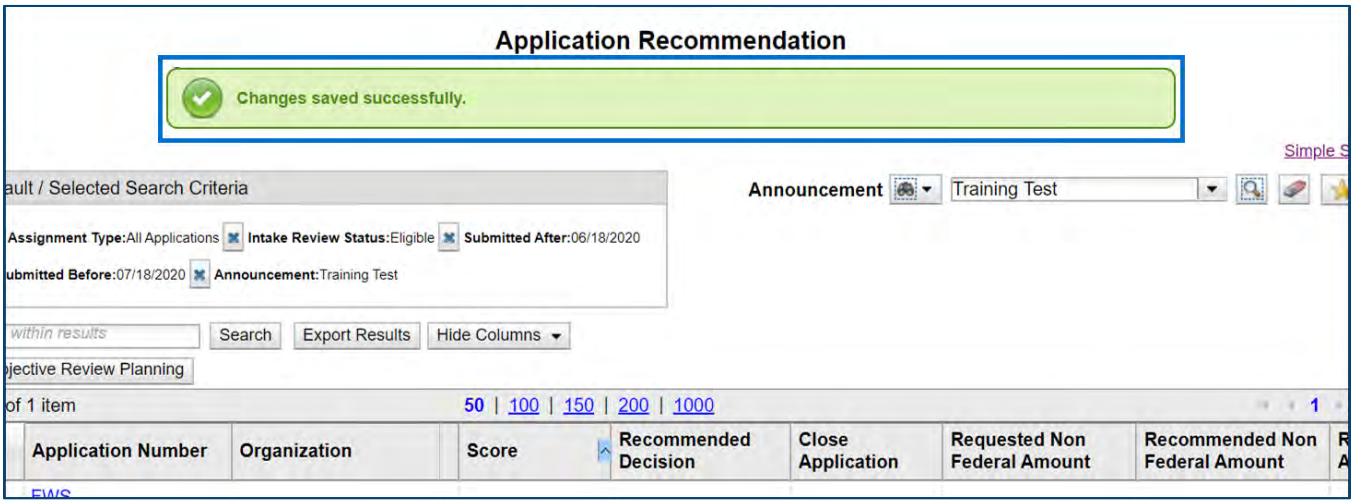

Figure 18: Application Recommendation screen with Changes saved successfully message

ENTER RECOMMENDED FUNDING AMOUNTS

Entering amounts is only possible for applications with the Approved status. Only enter numbers in the *Recommended Non Federal* and *Recommended Federal* fields. Do not enter symbols or decimal points.

Note: The *Request Non Federal* and *Requested Federal Amount* fields come from the electronically submitted SF-424. When the SF-424 is not entered online, the fields are blank. A missing SF-424 does not impact the ability to enter the Recommended Amounts.

To enter the recommended funding amounts, follow the steps below:

1. When a funding opportunity requires non federal match, from the "Application Recommendation" screen, click the **Edit** icon in the *Recommended Non Federal Amount* field.

Note: The *Edit* icon is only available in the recommended amount fields when the recommended decision is approved.

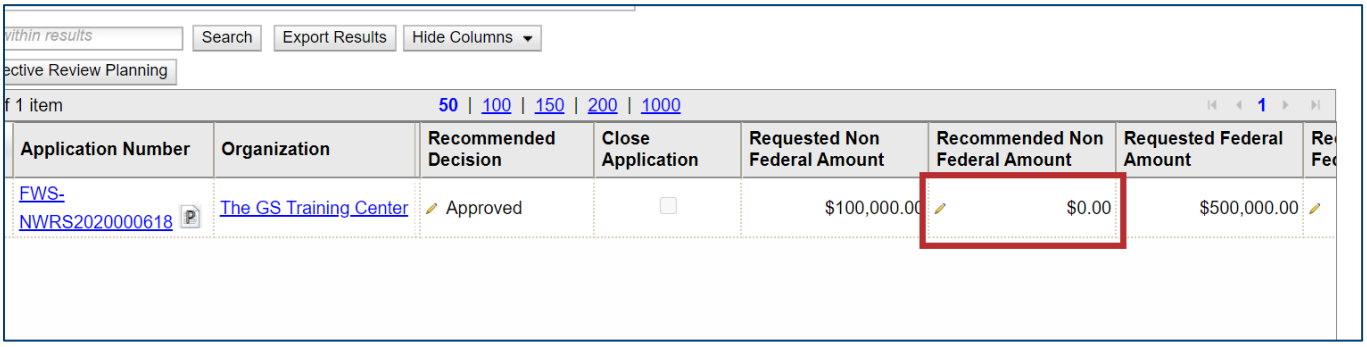

Figure 19: Application Recommendation screen Results table - Recommended Non Federal Amount Edit icon

2. Enter the **Non Federal** amount.

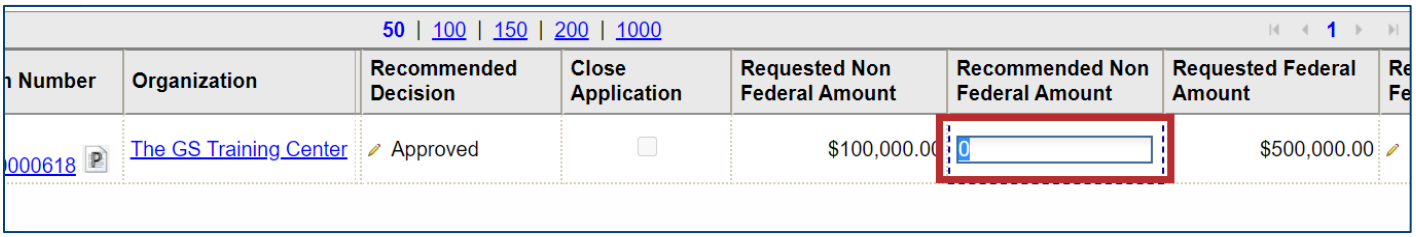

Figure 20: Application Recommendation screen Results table - Recommended Non Federal Amount field

3. Click the **Edit** icon in the *Recommended Federal Amount* field.

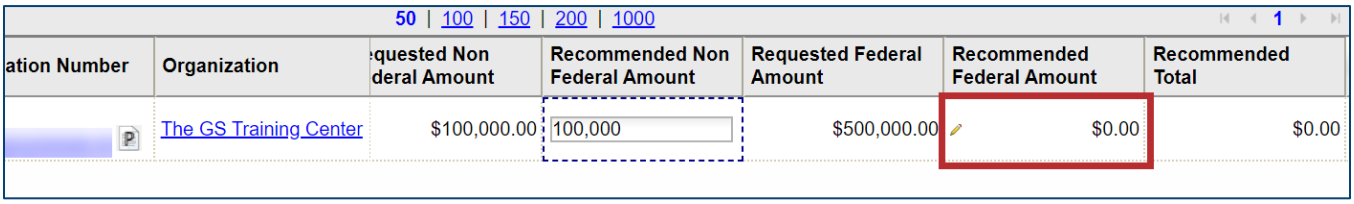

Figure 21: Application Recommendation screen with Recommended Federal Amount edit icon

4. Enter the **Federal** amount.

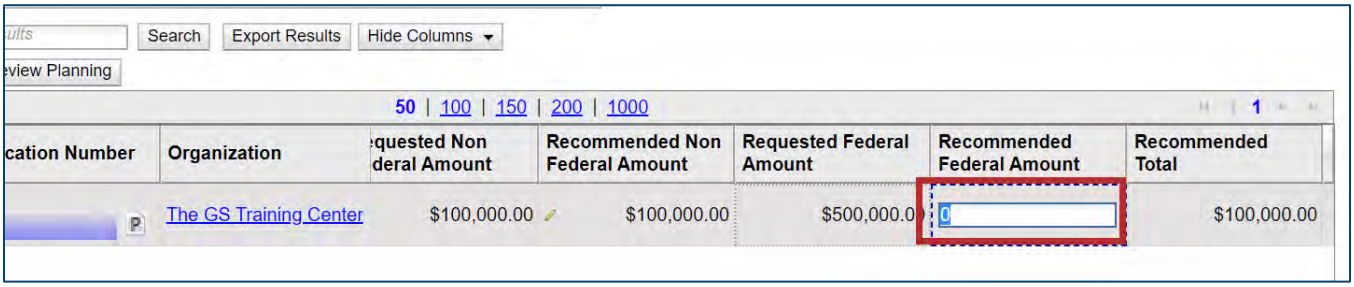

Figure 22: Application Recommendation screen with Recommended Federal Amount field

5. Select the **Save** button at the bottom of the screen.

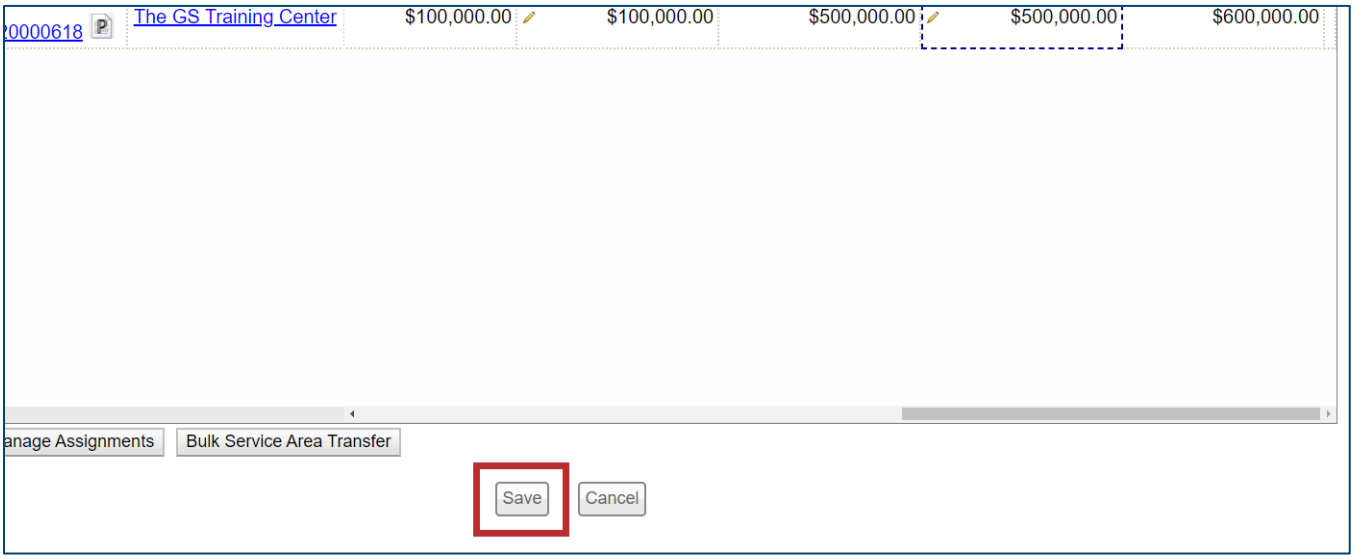

Figure 23: Application Recommendation screen - Save button

The confirmation message "Changes saved successfully" displays above the *Advanced Search* section. **Note**: The next step in the application processing workflow is to create the funding memo for approved applications. The recommended amount entered on the "Application Recommendation" screen displays on the funding list column on the funding memo results table.

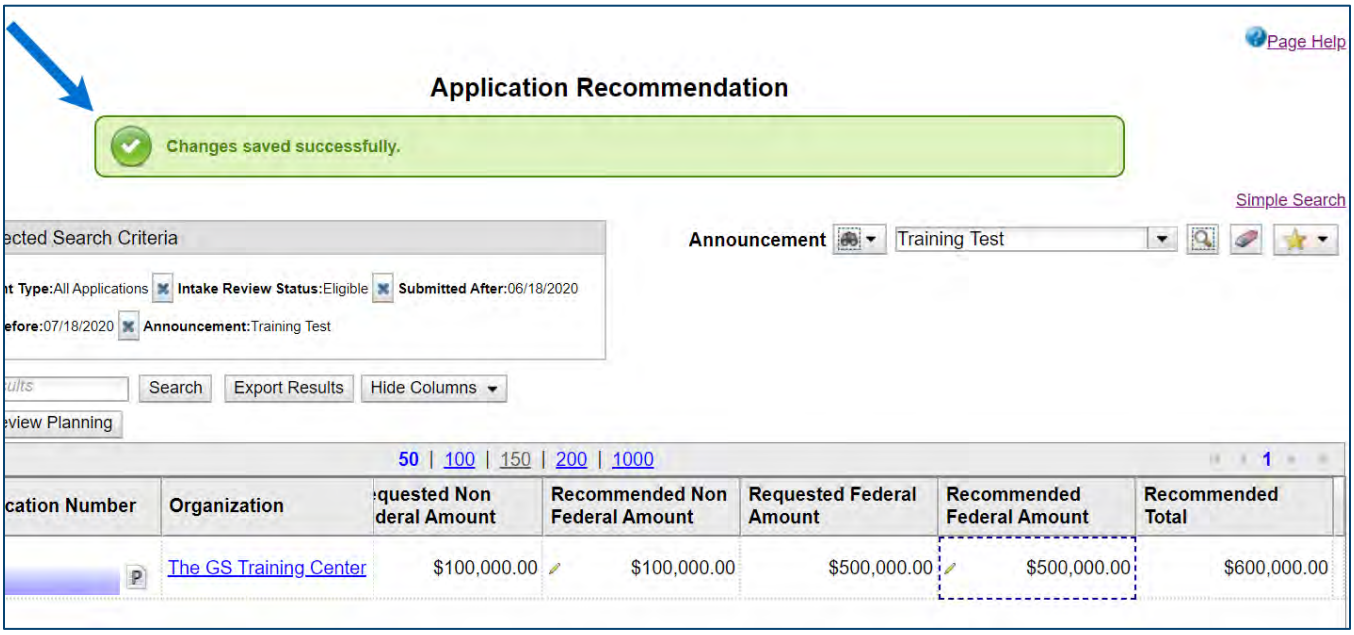

Figure 24: Application Recommendation screen with Changes saved successfully message

VIEW DETAILS

The *view details* icon expands the application row to provide access to additional information and actions, such as hyperlinks to the intake review, business review, funding memo, and application notes.
Note: When the application row expands, the user may need to scroll horizontally to the left to access the additional information and links.

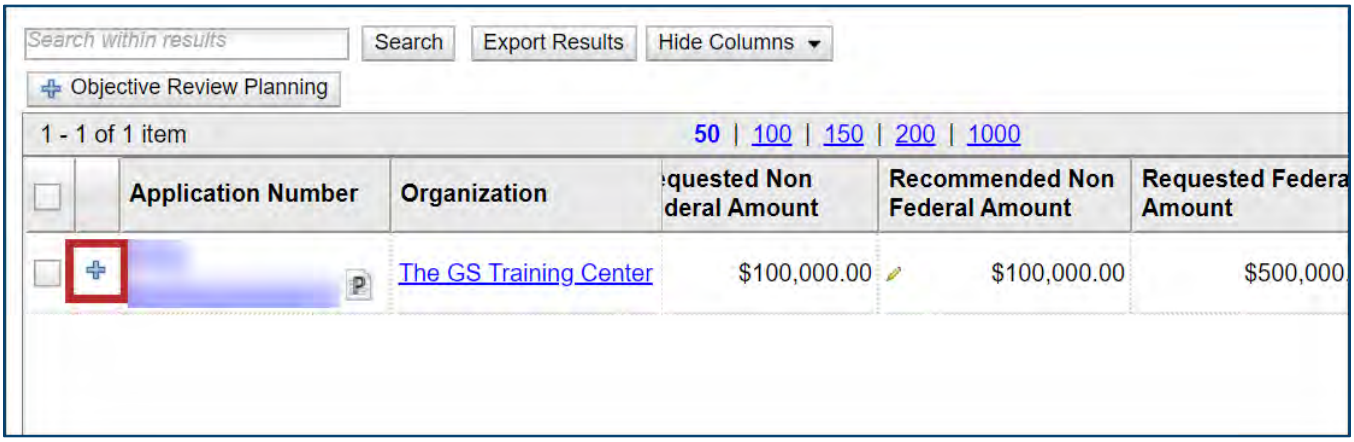

Figure 25: Application Recommendation screen with View Detail icon

When clicking the **Not Started** hyperlink from the *Funding Memo Status* line, the user is directed to the "Funding Memo" screen, and the application displays in the results table.
Note: The Not Started link only displays after saving the Approved decision.

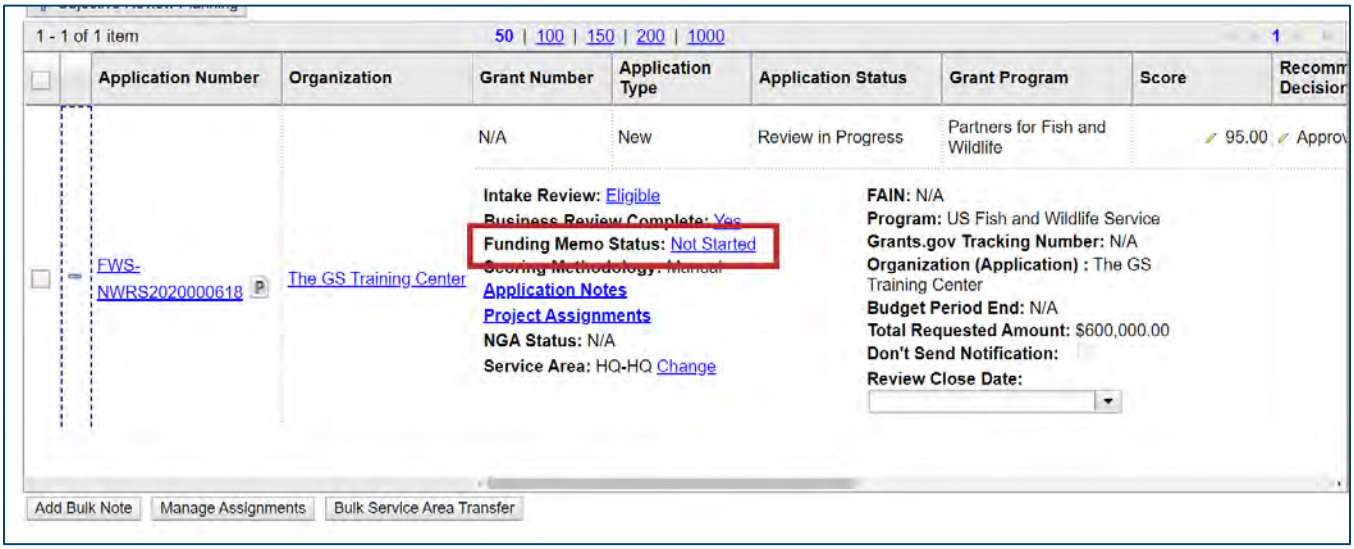

Figure 26: Application Recommendation screen - Funding Memo Status: Not Started hyper