



# GrantSolutions User Guide

## APPLICATION RECOMMENDATION ACTIONS

## Table of Contents

<b>APPLICATION RECOMMENDATION ACTIONS.....</b>	<b>1</b>
<b>PERFORM APPLICATION RECOMMENDATION ACTIONS .....</b>	<b>2</b>
COMPETITIVE ANNOUNCEMENTS: ENTER SCORE.....	8
ASSIGN A DECISION STATUS.....	11
ENTER RECOMMENDED FUNDING AMOUNTS .....	15
VIEW DETAILS.....	19

## 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.

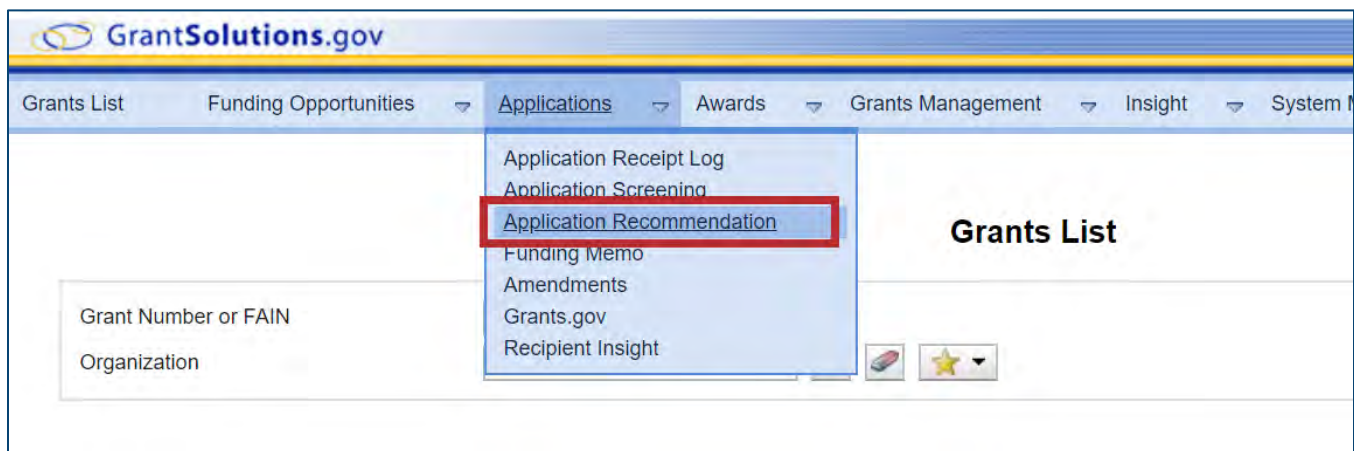


Figure 1: GrantSolutions GMM menu bar - Applications

The *Application Recommendation* screen displays.

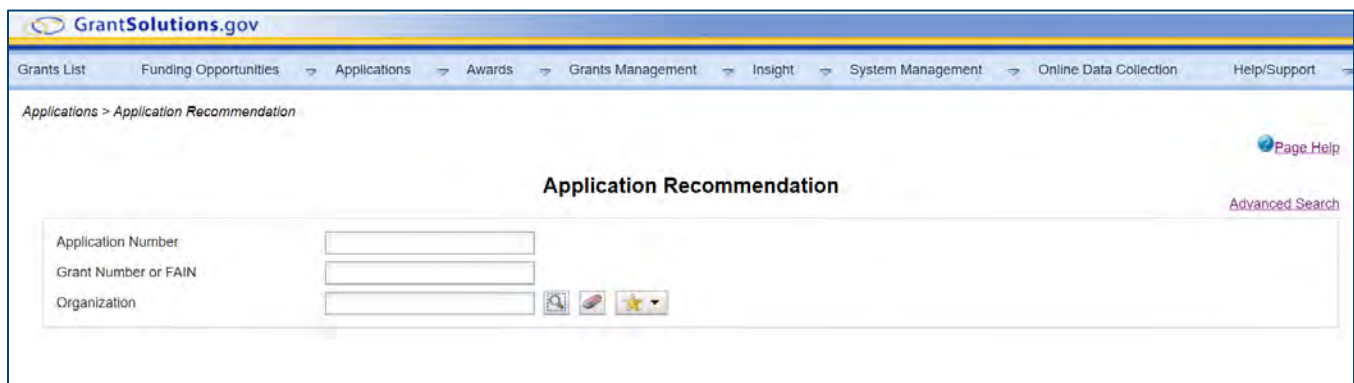


Figure 2: Application Recommendation screen

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

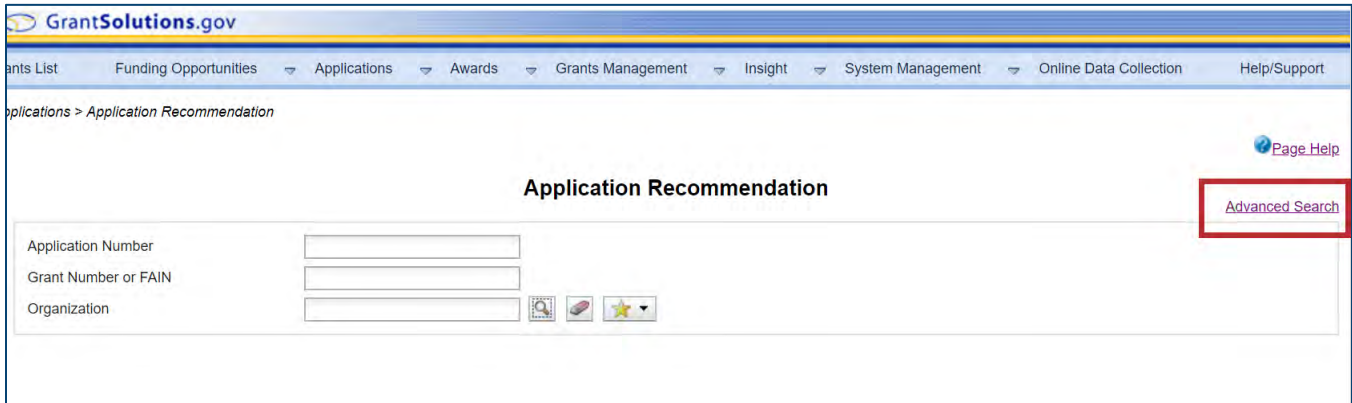


Figure 3: Application Recommendation Simple Search view - Advanced Search hyperlink

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.

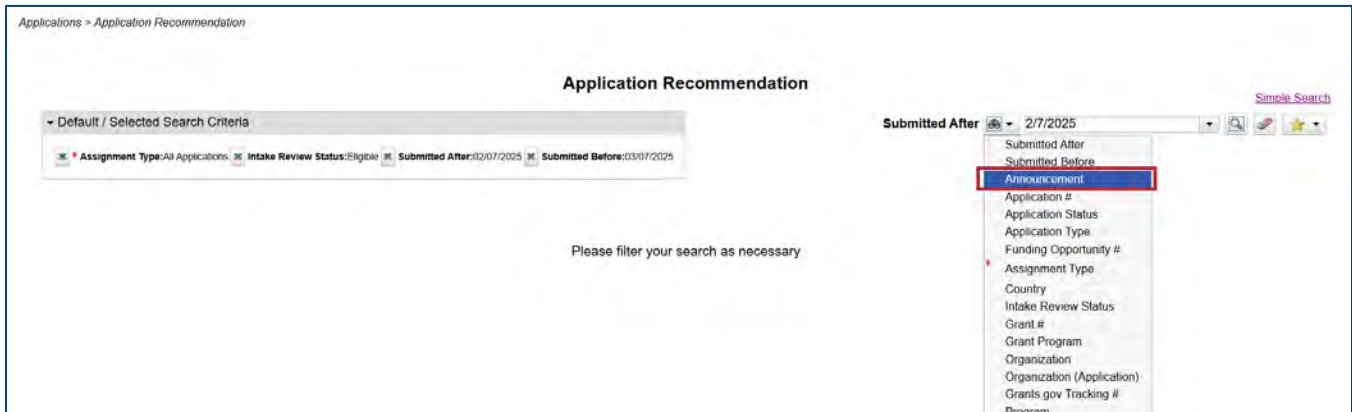


Figure 6: Application Recommendation screen with Announcement option

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

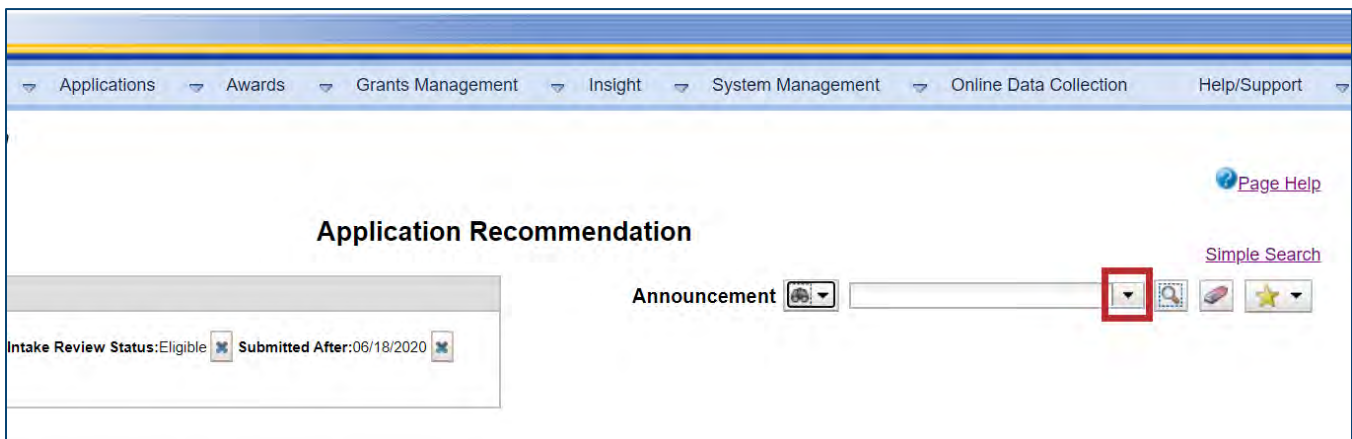


Figure 7: Application Recommendation Advanced Search view - Filter drop-down arrow



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

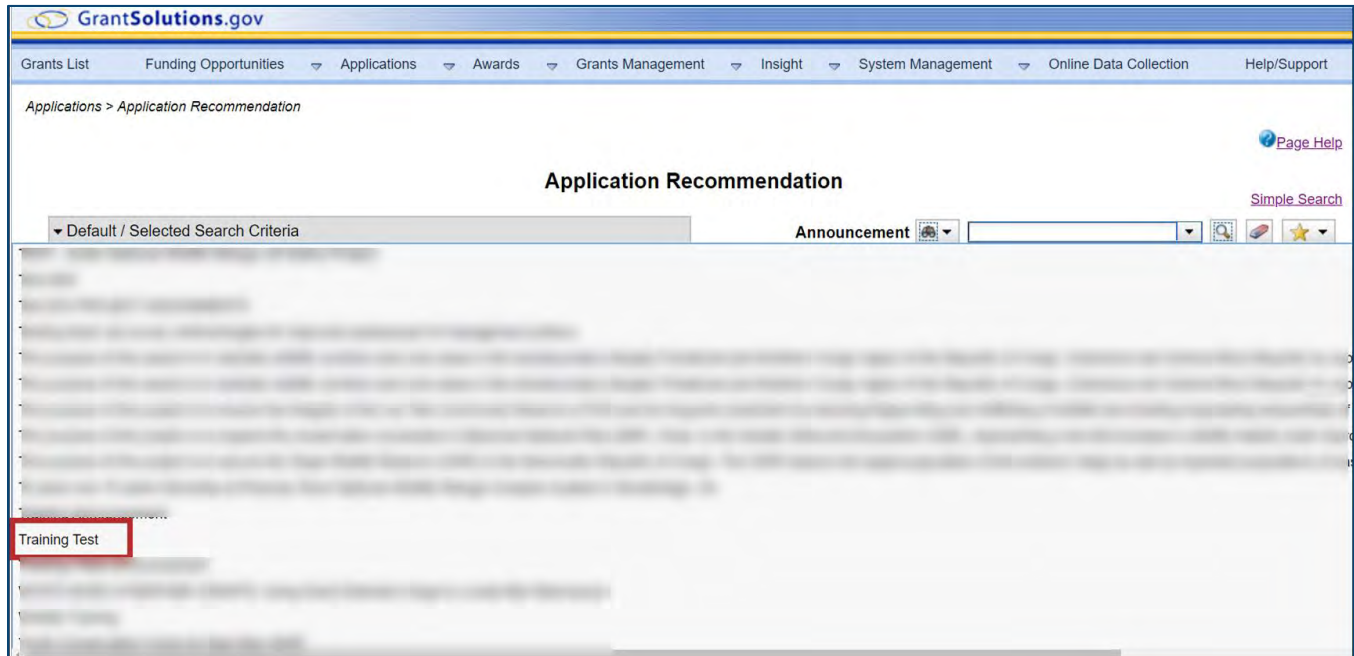


Figure 8: Application Recommendation screen with announcement name option

7. Click the **Search** icon.

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

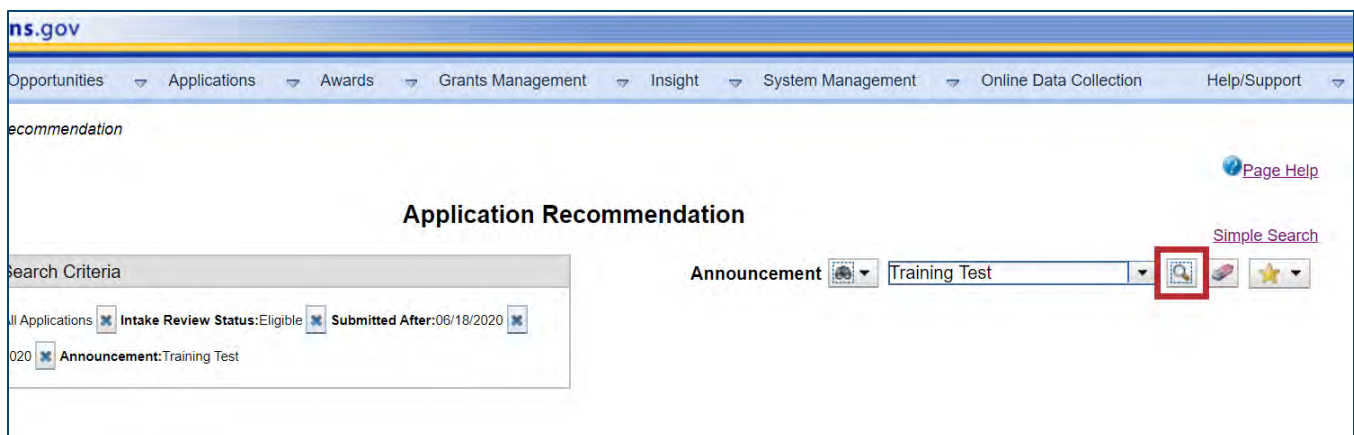
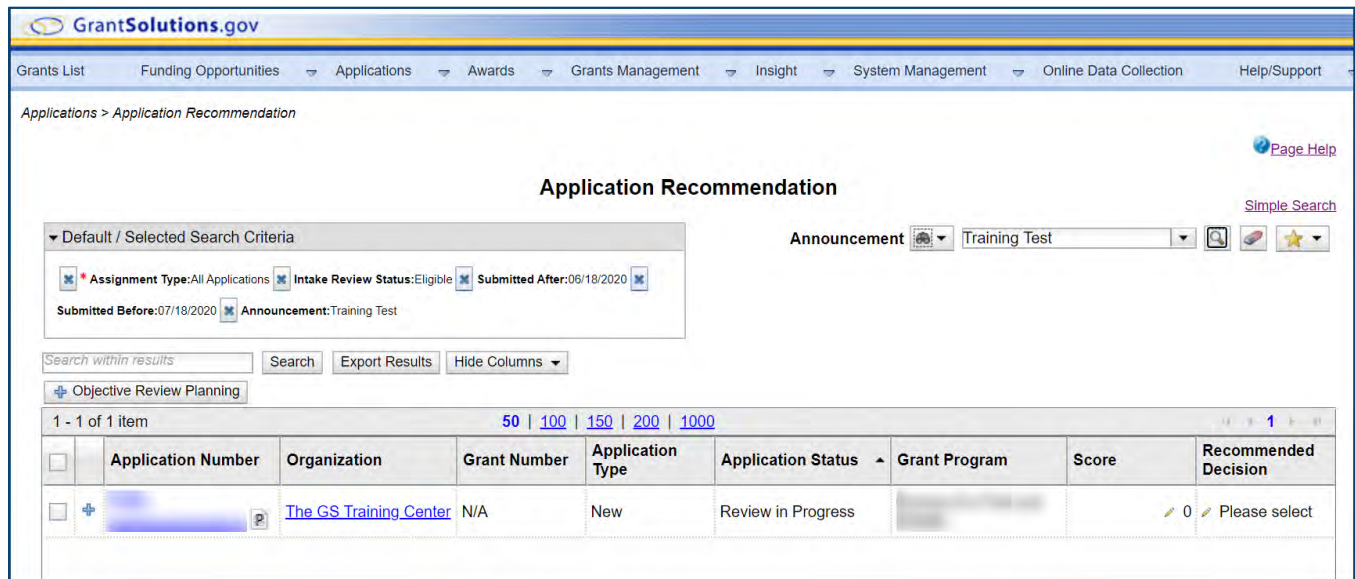


Figure 9: Application Recommendation Advanced Search view - Search icon



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.



The screenshot shows the GrantSolutions.gov website with the 'Application Recommendation' page. The page includes a navigation bar with links like 'Grants List', 'Funding Opportunities', 'Applications', 'Awards', 'Grants Management', 'Insight', 'System Management', 'Online Data Collection', and 'Help/Support'. Below the navigation bar, there's a breadcrumb trail 'Applications > Application Recommendation'. The main heading is 'Application Recommendation'. On the right, there's a 'Page Help' link and a 'Simple Search' button. Below the heading, there's a search criteria section with filters for 'Assignment Type: All Applications', 'Intake Review Status: Eligible', 'Submitted After: 06/18/2020', 'Submitted Before: 07/18/2020', and 'Announcement: Training Test'. There's also an 'Announcement' dropdown menu set to 'Training Test'. Below the search criteria, there's a 'Search within results' input field, a 'Search' button, and buttons for 'Export Results' and 'Hide Columns'. A link for 'Objective Review Planning' is also present. The results table shows 1 item. The table has columns: Application Number, Organization, Grant Number, Application Type, Application Status, Grant Program, Score, and Recommended Decision. The single row shows an application from 'The GS Training Center' with a status of 'Review in Progress' and a score of 0.

Application Number	Organization	Grant Number	Application Type	Application Status	Grant Program	Score	Recommended Decision
[Redacted]	<a href="#">The GS Training Center</a>	N/A	New	Review in Progress	[Redacted]	0	Please select

Figure 10: Application Recommendation screen

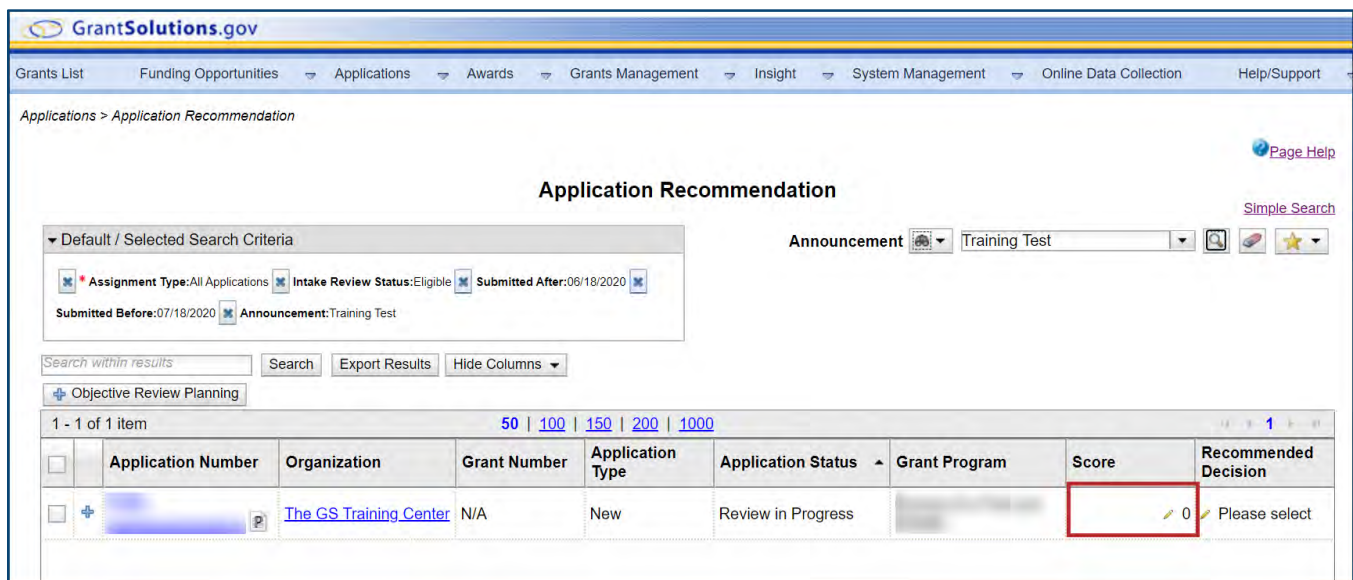
#### COMPETITIVE ANNOUNCEMENTS: ENTER SCORE

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.



GrantSolutions.gov

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

Applications > Application Recommendation

Page Help

### Application Recommendation

Simple Search

Announcement Training Test

Default / Selected Search Criteria

Assignment Type: All Applications Intake Review Status: Eligible Submitted After: 06/18/2020

Submitted Before: 07/18/2020 Announcement: Training Test

Search within results Search Export Results Hide Columns

Objective Review Planning

1 - 1 of 1 item

	Application Number	Organization	Grant Number	Application Type	Application Status	Grant Program	Score	Recommended Decision
	<a href="#">The GS Training Center</a>	N/A	New	Review in Progress		0	Please select	

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

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

The screenshot shows the 'Application Recommendation' screen on GrantSolutions.gov. The top navigation bar includes links like 'Applications List', 'Funding Opportunities', 'Applications', 'Awards', 'Grants Management', 'Insight', 'System Management', 'Online Data Collection', and 'Help/Support'. The main heading is 'Application Recommendation'. Below it, there are search filters for 'Assignment Type', 'Intake Review Status', 'Submitted After', and 'Submitted Before'. The 'Announcement' dropdown is set to 'Training Test'. A table with one item is displayed, with the 'Score' field highlighted by a red box. The table has columns: Application Number, Organization, Grant Number, Application Type, Application Status, Grant Program, Score, and Recommended Decision.

Application Number	Organization	Grant Number	Application Type	Application Status	Grant Program	Score	Recommended Decision
	The GS Training Center	N/A	New	Review in Progress		0	Please select

Figure 12: Application Recommendation screen with Score field

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

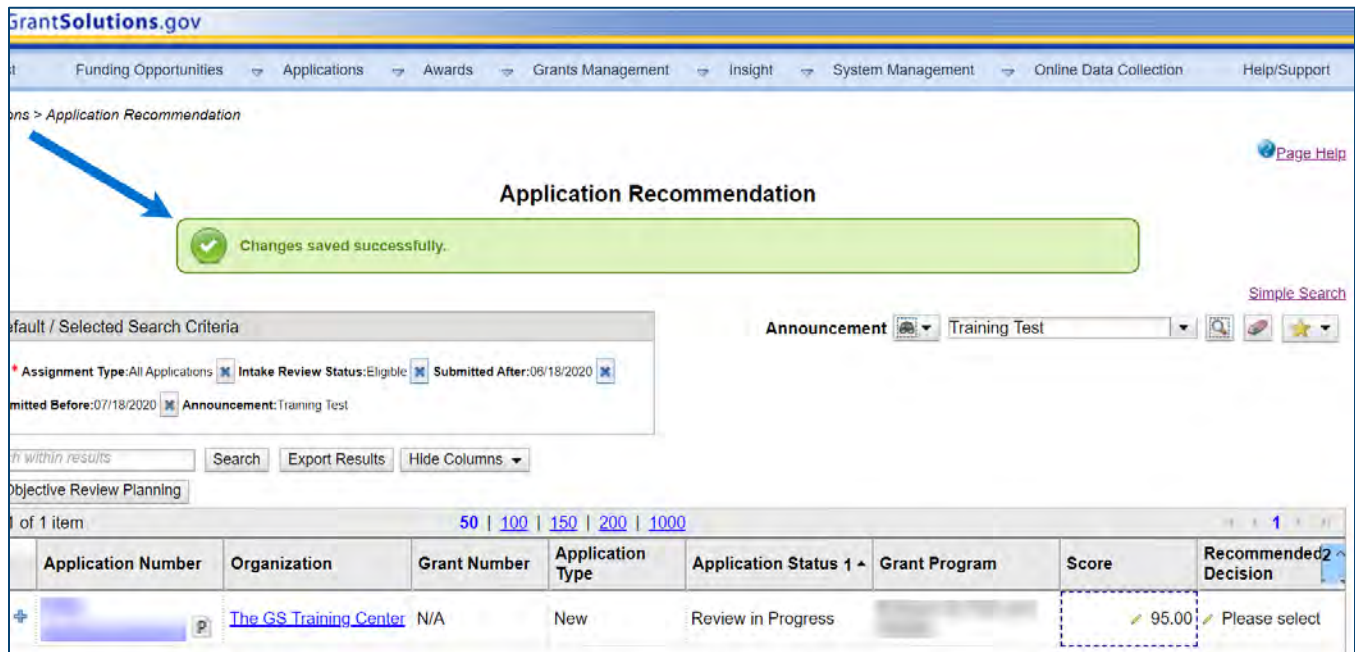
This screenshot shows the same table as Figure 12, but the 'Score' field now contains the value '95.00'. At the bottom of the screen, the 'Save' button is highlighted with a red box, along with a 'Cancel' button. The 'Recommended Decision' column still shows 'Please select'.

Application Number	Organization	Grant Number	Application Type	Application Status	Grant Program	Score	Recommended Decision
	The GS Training Center	N/A	New	Review in Progress		95.00	Please select

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.



The screenshot shows the GrantSolutions.gov website with the 'Application Recommendation' section active. A green message box at the top indicates 'Changes saved successfully.' with a green checkmark icon. Below this is the 'Advanced Search' section, which includes a 'Selected Search Criteria' box with filters for Assignment Type, Intake Review Status, Submitted After, and Submitted Before. There are also buttons for Search, Export Results, and Hide Columns. Below the search criteria is a table with 1 item. The table has columns for Application Number, Organization, Grant Number, Application Type, Application Status, Grant Program, Score, and Recommended Decision. The first row shows an application from 'The GS Training Center' with a score of 95.00 and a recommended decision of 'Please select'.

Application Number	Organization	Grant Number	Application Type	Application Status 1	Grant Program	Score	Recommended Decision
[Redacted]	<a href="#">The GS Training Center</a>	N/A	New	Review in Progress	[Redacted]	95.00	Please select

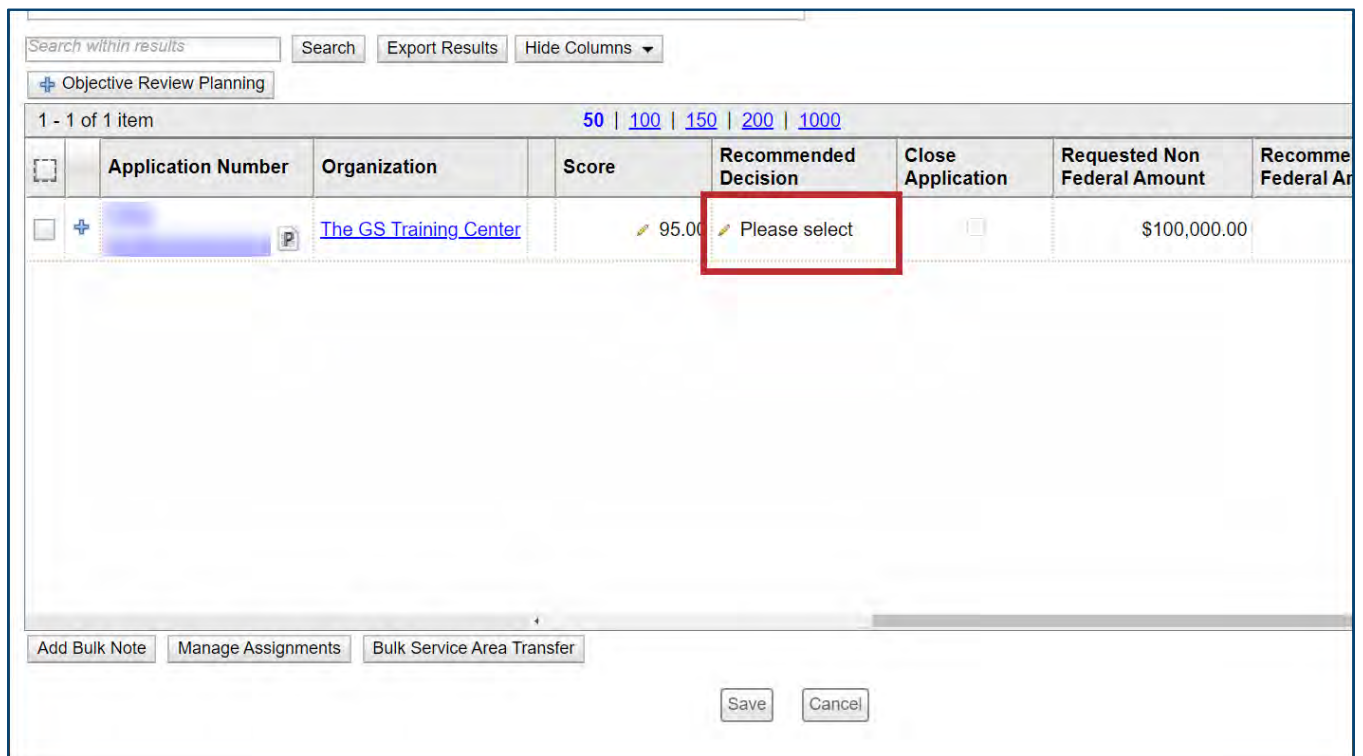
Figure 14: Application recommendation screen with Changes saved successfully message

#### 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.



Search within results Search Export Results Hide Columns ▾

+ Objective Review Planning

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

	Application Number	Organization	Score	Recommended Decision	Close Application	Requested Non Federal Amount	Recommended Federal Amount
<input type="checkbox"/>	<a href="#">[Redacted]</a>	<a href="#">The GS Training Center</a>	95.00	Please select	<input type="checkbox"/>	\$100,000.00	

Add Bulk Note Manage Assignments Bulk Service Area Transfer

Save Cancel

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.

ch within results

Search

Export Results

Hide Columns

Objective Review Planning

1 of 1 item

50 | 100 | 150 | 200 | 1000

1

	Application Number	Organization	Score	Recommended Decision	Close Application	Requested Non Federal Amount	Recon Federal
	<a href="#">FWS-NWRS2020000618</a>	<a href="#">The GS Training Center</a>	95.00	<div>Please select</div> <div><div>Please select</div><div>Approved</div><div>Approved Un-Funded</div><div>Disapproved</div><div>Deferred</div><div>Not Selected For Funding</div></div>		\$100,000.00	






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

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

Search within results Search Export Results Hide Columns ▾

Objective Review Planning

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

Application Number	Organization	Score	Recommended Decision	Close Application	Requested Non Federal Amount	Recommended Federal Amount
 	<a href="#">The GS Training Center</a>	 95.00	 Approved	<input type="checkbox"/>	\$100,000.00	

1

Figure 17: Application Recommendation screen with Save button



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

**Application Recommendation**

Changes saved successfully.

**Default / Selected Search Criteria**

Assignment Type: All Applications ☐ Intake Review Status: Eligible ☐ Submitted After: 06/18/2020

Submitted Before: 07/18/2020 ☐ Announcement: Training Test

within results  Search  Export Results  Hide Columns

Objective Review Planning

Announcement Training Test

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

Application Number	Organization	Score	Recommended Decision	Close Application	Requested Non Federal Amount	Recommended Non Federal Amount	R A
EWS							

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.

<div> <input type="text" value="within results"/> <input type="button" value="Search"/> <input type="button" value="Export Results"/> <input type="button" value="Hide Columns"/> </div> <div> <input type="button" value="Active Review Planning"/> </div> <div> of 1 item <div> <a href="#">50</a>   <a href="#">100</a>   <a href="#">150</a>   <a href="#">200</a>   <a href="#">1000</a> </div> <div> 1 </div> </div>							
Application Number	Organization	Recommended Decision	Close Application	Requested Non Federal Amount	Recommended Non Federal Amount	Requested Federal Amount	Re Fed
<a href="#">FWS-NWRS2020000618</a>	<a href="#">The GS Training Center</a>	Approved	<input type="checkbox"/>	\$100,000.00	\$0.00	\$500,000.00	

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



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

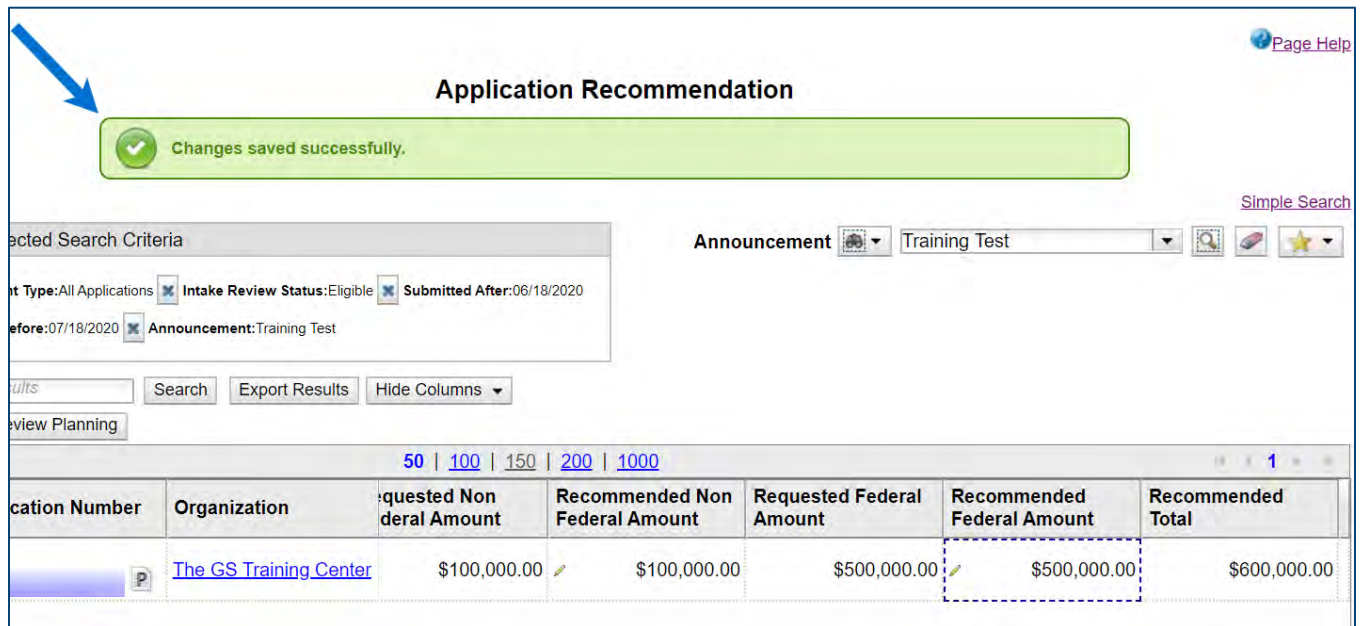
00000618		<a href="#">The GS Training Center</a>	\$100,000.00		\$100,000.00	\$500,000.00		\$500,000.00	\$600,000.00
----------	---	--	--------------	---	--------------	--------------	---	--------------	--------------

[Manage Assignments](#) [Bulk Service Area Transfer](#)

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.



The screenshot shows the "Application Recommendation" screen. A green banner at the top displays the message "Changes saved successfully." with a checkmark icon. Below this, the "Advanced Search" section is visible, showing search criteria for "Intake Review Status: Eligible" and "Submitted After: 06/18/2020". The "Announcement" dropdown is set to "Training Test". The "Results" section shows a table with 1 result. The table has columns for Application Number, Organization, Requested Non Federal Amount, Recommended Non Federal Amount, Requested Federal Amount, Recommended Federal Amount, and Recommended Total. The first row shows "The GS Training Center" with a requested non-federal amount of \$100,000.00, a recommended non-federal amount of \$100,000.00, a requested federal amount of \$500,000.00, a recommended federal amount of \$500,000.00, and a recommended total of \$600,000.00. A blue arrow points to the success message banner.

Application Number	Organization	Requested Non Federal Amount	Recommended Non Federal Amount	Requested Federal Amount	Recommended Federal Amount	Recommended Total
	<a href="#">The GS Training Center</a>	\$100,000.00	\$100,000.00	\$500,000.00	\$500,000.00	\$600,000.00

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.


Search within results						Search	Export Results	Hide Columns ▾
+ Objective Review Planning								
1 - 1 of 1 item						50   100   150   200   1000		
<input type="checkbox"/>	Application Number	Organization	Requested Non Federal Amount	Recommended Non Federal Amount	Requested Federal Amount			
<input type="checkbox"/>		<a href="#">The GS Training Center</a>	\$100,000.00	\$100,000.00	\$500,000.00			

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.

1 - 1 of 1 item									50   100   150   200   1000		1
<input type="checkbox"/>	Application Number	Organization	Grant Number	Application Type	Application Status	Grant Program	Score	Recommendation			
<input type="checkbox"/>	<a href="#">FWS-NWRS2020000618</a>	<a href="#">The GS Training Center</a>	N/A	New	Review in Progress	Partners for Fish and Wildlife	95.00	Approved			
Intake Review: <a href="#">Eligible</a> Business Review Complete: <a href="#">Yes</a> <b>Funding Memo Status: <a href="#">Not Started</a></b> Scoring Methodology: <a href="#">Manual</a> <a href="#">Application Notes</a> <a href="#">Project Assignments</a> NGA Status: N/A Service Area: HQ-HQ <a href="#">Change</a>									FAIN: N/A Program: US Fish and Wildlife Service Grants.gov Tracking Number: N/A Organization (Application): The GS Training Center Budget Period End: N/A Total Requested Amount: \$600,000.00 Don't Send Notification: <input type="checkbox"/> Review Close Date: <input type="text"/>		
<a href="#">Add Bulk Note</a>   <a href="#">Manage Assignments</a>   <a href="#">Bulk Service Area Transfer</a>											

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