GrantSolutions 3.7 Release Notes – Federal Staff

General Improvements

1. Corrected a few system errors and instances of duplicate information displays on the following screens:
    - Competing Application Receipt Log
    - Budget Worksheet Search Screen
    - Application Receipt Log
2. A modification was implemented for the Application Receipt Log that corrects the formatting when printing a PDF for Key Personnel.
3. A change was implemented to the Manage Non-Competing Application Kits screen that removed a built-in filter, which displayed only assigned grants. Performing a search now allows users to view a listing of assigned and unassigned grants.
4. Implemented a modification to the Grant History screen that sorts the list of applications by Action date in descending order. Disapproved applications, Amendments or applications that are not funded (NF) will display at the top of the page.
5. Implemented several corrections to the GrantSolutions to Grants.gov FIND interface, which integrates GrantSolutions' announcement transmissions with FIND.
6. A correction was implemented and the Post Award Amendment Action now displays Global and Partner amendment types for the Partner only. Only active types are displayed as well.

Application Screening

An enhancement was implemented that adds a Bulk option feature to the Application Screening page. Multiple records can be selected when a search retrieves multiple eligible or ineligible applications.

To perform a bulk action:

- Perform a search based on eligibility.
- Click the **Select All** checkbox
- Scroll to the bottom of the screen and click the **Mark Eligible** button
- Alternatively, select the **Mark Ineligible** button.

Enterprise Reporting System (ERS)

GrantSolutions will integrate with ERS to support new reporting capabilities. Financial accounts that are used for the American Recovery and Reinvestment Act of 2009 will be added to the CAN Lookup screen.

NOTE: The functionality described above was deployed with GrantSolutions Release 3.5.

With the Version 3.7 release, Grants and Program Staff have a new menu option to access GrantSolutions Enterprise Reporting System (ERS) web-site for report generation.

To access:

- Select the **Reports** Main Menu option
- Select the **Enterprise Reporting** sub-menu option
- The ERS web-site launches in new window.

Federal Funding Accountability and Transparency Act (FFATA) Reporting

The draft NGA page has been modified to capture the Grant Recipient's County, City, State Code and County Name for FFATA reporting. This information will be verified and/or retrieved when an award is drafted or the primary address of the recipient is modified. The FFATA fields will display a combination of editable and *display-only* fields.

- All previously entered FFATA information will display on-screen in a *display-only* field. For all remaining information, an editable field or *drop-down* list containing available information will be presented.
- New lookup tables will be available for Federal Agency codes and State and County codes.
- The editable fields are editable only in the "Draft" and "In Review" states.
- All FFATA data fields are **required** except the following:
    1. Recipient Congressional District
    2. Recipient DUNS 4 Number
    3. Dun & Bradstreet Confidence Code
    4. Program Source/Treasury Account Symbol; Sub-Account Code

NOTE: The functionality described above was deployed with GrantSolutions Release 3.5; but disabled.

With the Version 3.7 release, when an Announcement is posted, the transmissions to ERS include the following FFATA data elements:

- Recipient City Code
- Recipient County Code
- Recipient County Name
- Recipient State Code
- Recipient Type
- Dun & Bradstreet Confidence Code
- Agency Code
- Federal Award ID
- Federal Award ID Modification
- State Application ID Number

A Zip Code and Congressional District validation tool/service for FFATA data has also been implemented.

Project Locale Screen

A new screen has been added to GrantSolutions' Admin Module that allows the System Administrator (SA) to create a three-level hierarchical set of locations to categorize and breakdown Partner Service Areas into smaller geographical locations.

Once these unique lists of "locations" are created, the Program Coordinator (PC) or Grants Management Specialist (GMS) can set the Project Locale for a Grant Project before drafting an Award, by assigning

Grant Projects to any of the three-levels, which categorize the project in greater detail for reporting and project analysis across Grant Programs.

The three levels of Project Locales are as follows:

1. Global - (highest level - includes all child regions & countries)
2. Region - (secondary level - includes all child countries)
3. Country (tertiary - last level)

Set Project Locale

Once configured within the Admin Module, the Program Coordinator (PC) or Grants Management Specialist (GMS) may *set the project locale* for a Grant Project. For reporting and grouping purposes, the Project Locale is set before the award is drafted. Available choices are based on Service Areas serviced by assigned offices.

Once Project Locales are placed into use, they can not be deleted; however, any changes (edits) will change all existing projects pointing to the Project Locale.

The Project Locale may be set from one of the following screens:

1. Competing Application Receipt Log
2. My Grants List (Federal Staff)
3. Funding Memo

From one of the screens listed above:

- Perform a search
- Select the **Change Project Locale** link adjacent to the selected grant record.
- From the Set Project Locale screen select one of the available locales.
- Sub-groups are displayed in an indented format.
- Click **Submit** and GrantSolutions returns to the previous screen and displays the selected Project Locale.

NOTE: The Change Project Locale link is an *optional* feature that displays only for configured Partner Agencies.

Organization

1. GrantSolutions has been modified to now support UTF/Unicode values.

NOTE: The functionality described above was deployed with GrantSolutions Release 3.6

With the Version 3.7 release, the Organization Maintenance Screen – Edit screen has been modified to support UTF/Unicode values. These values are now supported throughout the entire system.

2. Implemented a modification when entering an Organization's Employer Identification Number (EIN). GrantSolutions will validate the entry by displaying the organization name that matches the GrantSolutions registered Entity Identifier for the entered value or display the message

“The EIN you entered is for <EIN Name> which does not match the organization name <Org Name>.”

The following rules apply when entering the EIN:

- A maximum of 12 characters may be entered by the user.
- There is a minimum of 9 characters
- The field is required.

Partners

Department of Transportation (DOT)/ Federal Railroad Administration (FRA)

A new screen has been added to GrantSolutions’ Admin Module that allows DOT Administrators to categorize Grant Programs. The Manage Project Category screen is configurable by Grant Program and allows the System Administrator (SA) to create, edit, and delete Project Categories for the partner for reporting purposes.

To access:

- Log in as the System Administrator.
- Select the **Grants Workload Management** Main Menu option.
- Select the **Project Categories** sub-menu option, which accesses the Manage Project Categories screen.

To add a Project Category:

- Select the **Add** button to access the Project Categories - Add screen
- Select a Partner Agency
- Enter a unique Category Name, which will be used to group a set of Grant Programs.
- Click **Save** to update the database and the system returns to the Manage Project Categories screen.

To assign the newly created Partner Project Categories to a Grant Program:

- Select the **Grants Workload Management** Main Menu option
- Select the **Programs** sub-menu option
- Perform a search for the Grant Program(s)
- Select the **Manage Grant Programs** link.
- Select the **Edit** link
- Above the “**Award Workflow Settings**” heading.
- Select the **Program Category** checkbox adjacent to the Categories field title.

Categories can be assigned from the following screens by selecting the **Categories** link once a search has been performed and selecting the category from the list of available options.

1. Competing Application Receipt Log
2. Recommendation and Funding Memo
3. My Grants List (Federal Staff)

NOTE: The functionality described above was deployed with GrantSolutions Release 3.6

With the Version 3.7 Release, the Project Categories screen allows users to apply a filter per login session to the following **filter function** screens:

1. Competing Application Receipt Log
2. Recommendation and Funding Memo
3. My Grants List (Federal Staff)

By default, the filter is set to "**All**," which allows users to view all assigned Projects including projects without assigned Project Categories. However, once a filter is set, when a search is executed, the retrieved set of grant records *only* displays the selected Partner Project Categories selected from the users assigned Service Office.

To apply a filter:

- Once logged into the GrantSolutions application
- Select the **System Management** Main Menu option
- Select the **Search Preferences** sub-menu option.
- Select one of the three (3) available options:
    1. **All -** Once a search is executed, *All projects* display including projects without assigned Project Categories.
    2. **Select Categories from the following -** Place a check in one of the Project Categories, execute a search on one of the filter function screens, and only projects with the selected category display. When multiple categories are selected, execute a search on one of the filter functions screens, and only projects with the selected categories display.
    3. **None** – Once this filter is set *only* Projects without Categories will display.

Department of Transportation (DOT)/ Pipeline and Hazardous Materials Safety Administration (PHMSA)

Implemented a PHMSA Notice of Grant Award (NGA) for application processing within GrantSolutions.

Administration for Children & Families/Office of Family Assistance (OFA)

Risk Management

The Risk Management module allows Program Staff to perform quantitative risk assessments for their grantees. Each grant program can be setup to have a custom set of questions that are used when performing risk assessments. The questions used can be changed at any time by users with the proper authority.

This functionality will be available from the top menu and also via My Grants List. Not all programs will see the new options. Program offices must request that this functionality be turned on for them.

The following is a summary of the new functionality:

1. The Questionnaire Management screen allows program office staff to manage the risk criteria questions to be used when performing risk assessments. Each program office can have its own set of questions to be used for that particular grant program.

2. The Risk Assessment screen is allows Program Staff to perform a risk analysis of a grantee for a particular grant project.
3. The Risk Report is a report that shows the risk scores and the risk indicator for grantees. The report currently provides risk score for each grant program.

NOTE: The Risk Management module is currently available *only* to OFA. For a demonstration, please contact GrantSolutions' HelpDesk.

NOTE: The functionality described above was deployed with GrantSolutions Release 3.5

With the Version 3.7 release, the Risk Management module has been modified to provide users with the ability to add guidance for rating risk criteria.

The guidance is displayed following each entered risk criteria.

To view:

- Select the **View Rating Guidance** link and a text box opens that displays the associated guidance.

Contact Management

A new screen is available with this release. The Manage Contacts screen provides users with the ability to manage contact information. Information about the people associated with Grantee Organizations in their day-to-day grants tasks management. Contact information for persons providing Technical Assistance to Grantees may be captured, which facilitates communication and correspondence with Grantees, Grantee related Organizations, and associated personnel.

To access:

- Perform a search from My Grants List.
- Select the **Contact Management** link

From the Manage Contacts screen

1. Click the **First Name** link and a widget displays the following Person information about the associated application.
    - First Name
    - Last Name
    - Organization
    - Address
    - Phone
    - Email
2. Click the **X** to close the dialog box when finished.

To Add a New Contact:

- Select the **Add New Contact** button, which accesses the Person Search screen.
- Perform a Person Search to make certain the Person's Name is currently not in the database.
- Select the **Add New Contact** button
- Enter the Contact Information using the Contact Person screen.
- Click the **Save Person** button and GrantSolutions returns to the Manage Contacts screen.

To edit a Contact

- Select the **Edit** link adjacent to the Person's Name
- From the Contact Person screen enter the updates.
- Select the Saver Person button to update and return to the Manage Contacts screen.

Department of State (DOS)/ Federal Railroad Administration (FRA)

Implemented a modification for DOS users for Box 22, "Send Reimbursement Request To," which allows users to enter reference information (text) within three (3) data-entry boxes. Up to 60 characters may be entered. This information displays on the NGA PDF.

Funding Memo

1. Implemented a change that allows simultaneous access to shared data when editing a Funding Memo. This modification assists the flow of requests to enable sequential access to the Funding Memo.
2. Added an enhancement to the Funding Memo. Once a search is performed an icon displays adjacent to each application number.
    a. Click the icon and a widget displays the following information about the associated application.
        - Grant program
        - Service Area
        - Grants Office
        - Program Office
    b. Click the **OK** button to close the dialog box when finished.

Award Workflow

1. Added an enhancement to Award Workflow when the GMO declines an award on behalf of the Grantee during the "Awaiting Acceptance" state, the award Returns to Draft and the decliner information is saved and made viewable in the Workflow History.
2. Added Recall feature to the Award Workflow and provided the GMS with the ability to Recall an NGA in an "In Review" state. The GMS is allowed to Recall the NGA to make corrections and the NGA "Returns to Draft.".

Issue Not Funded Notices

The following modifications have been implemented within the Issue Note Funded Notices screen.

1. The "Flag letter as sent" is now an optional feature and no longer must be set before the applicant is notified.
2. A Bulk option feature has been added that allows multiple records to be selected when a search retrieves multiple applications.

To perform a bulk action:

- Perform a search.

- Click the **Select All** checkbox
- Scroll to the bottom of the screen and click the **Flag as Selected** button
- Alternatively, select the **Issue Selected** button.

NOTE: Existing rules state that only Grants Staff may perform all actions on the Issue Not Funded Notices screen for ineligible applications; and only Program Staff controls the applications that were eligible, but marked as not funded status in the Program Review. These applications are visible to both; however, the action links are hidden and/or presented based on Authorized roles.

Admin Module - Manage Organization

1. Modified the Admin – Manage Organization Screen when adding an Organization to GrantSolutions. Whether adding an Internal or External Organization, the button will display "Add Org."
2. Implemented a correction when changing the Country of an existing Organization within the Admin - Module.
3. The Grants Program Admin screen has been modified to correct saving changes to the Review setting option from "Manual" to "Auto-RMM."

Known Issues

Return Awards to Draft

Any awards in progress (or NGAs beyond Draft state) that are not issued by COB on Thursday (July 23, 2009) will have to be returned to a DRAFT state and edited. Otherwise they will fail when they try to issue because they will not have the newly required FFATA information.

1. Records in DRAFT state on Friday morning will be OK. However, users will have to edit for the required FFATA data.
2. Anything that has been moved out of DRAFT state and is awaiting any other review action will either need to be recalled by GMO or rejected by reviewer.
3. Once back in DRAFT state GMO/GMS can edit for required additional FFATA information; and then process as usual.

NOTE: It is suggested to not DRAFT new NGAs before Friday unless they can push through and issue before COB Thursday.