

GrantSolutions 3.21 Release Notes

Simple Search for Grants List, Application Receipt Log and Application Recommendation Screens

A new feature in this release is a defaulted simple search widget for Grants List, Application Receipt Log, and Application Recommendation screens. The Simple Search allows users to quickly perform a basic search within GrantSolutions.

These simple search parameters are:

- Application Number
- Grant Number
- Organization Name

Records fully or partially matching the user's search information and office assignments will be returned. Users are required to enter a value in at least one of the three search fields. Otherwise the system will not return any results.

For users that prefer the search with multiple filters, click on the Advanced Search link.

Figure 1- 1 Simple Search

Persistent Search Results

Previous releases would return cleared status on the Advanced Searches when navigating and opening certain icons and hyper links for the specific search. The new release will allow results for advanced search to persist if a user returns from another screen. The search results will persist irrespective of the number of times the user moves away from the screen. Illustration shows the screen returning to advanced search.

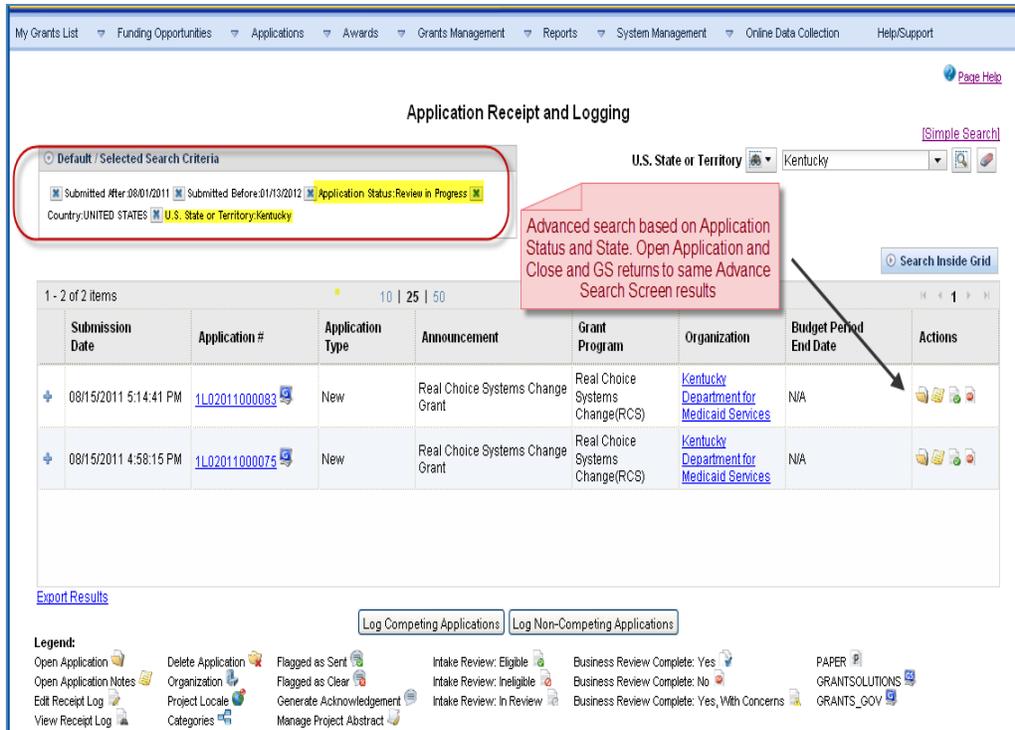


Figure 1-2 Advanced Search return

The search results **will not persist** if criteria has been selected and then removed before the user navigates away from the screen. The search results will be cleared if the user switches from the advanced widget screen to the Simple widget screen and vice versa.

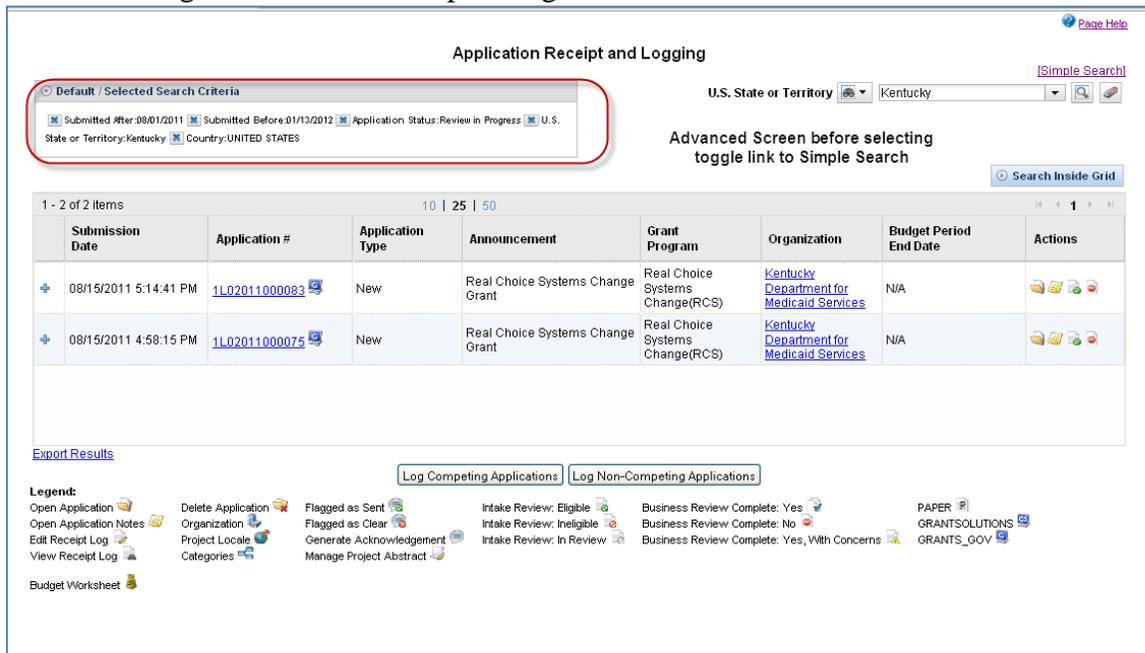


Figure 1-3 Advanced search screen before toggling to simple search

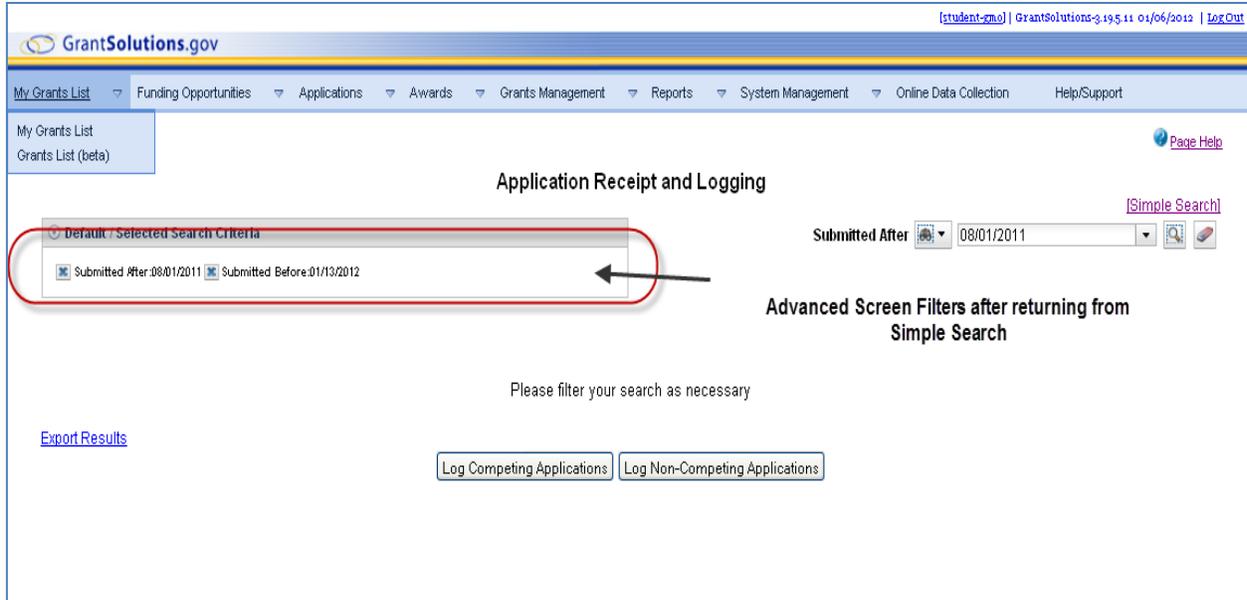


Figure 1-4 Advanced Search screen after toggling from simple search

Field Borders for Simple Search

Additionally, field borders for the new simple search widget have been added back to provide better view of entry items.

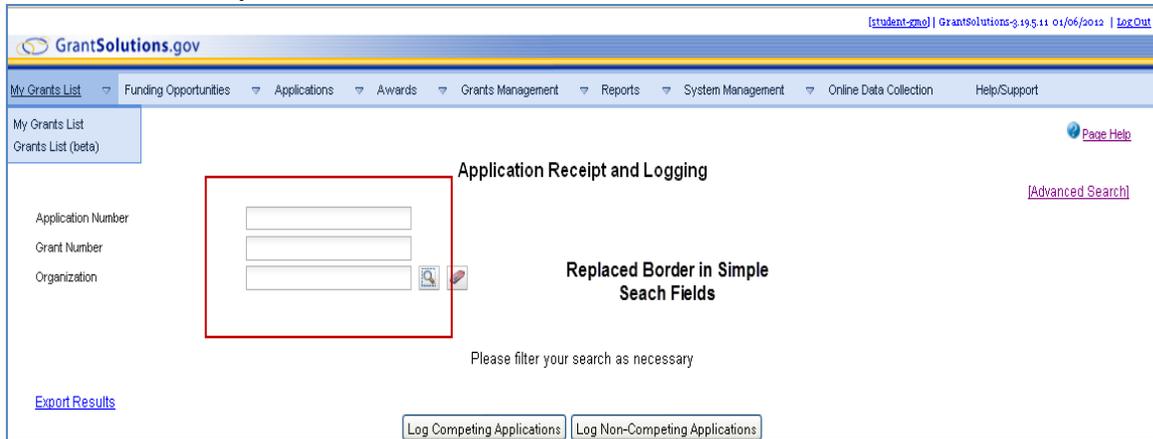


Figure 1-5 Field borders

Grants List (Beta)

Previously, Competing Continuation and Directed Supplement labels were being displayed by default when these labels should only be displayed if 1) an announcement of that type is posted and/or 2) continuation based on the associated grant.

In this release labels (competing continuation and directed supplement) will not be displayed in the Grants List Beta detail section if the grants do not have announcements and applications under those categories.

Program Office	Grant Program	Grant Number	Organization	Project Period Start Date	Project Period End Date	Amendment Status	Actions
Metal Gear Solid PSO	Screaming Mantis	SHD11000001	Red Team Grantee	01/31/2013	01/30/2016	Received (Post Award Paper Submission)	[Icons]
Orange Balls Support	Protection of Orange Balls for PURPLE	POBPOB11010	Test Organization	02/17/2011	02/28/2012	Multiple Amendments In-Progress	[Icons]
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Project Title: TEST 2 for Purple Federal Budget: \$2,000 Budget Period: 1 Start Date: 02/17/2011 End Date: 02/16/2012 Closeout Date: Last Issued Award: Grant Number: 1 POBPOB110105-01-00 Issued Date: 05/18/2011 Amendment Number: 0 Terms & Conditions Due Date: N/A (0) CCR Information: Status: EXCEPTION Valid Until:</p> <p>Project Locale: AquaProjectLocaleGlobal Categories: None Non Competing Continuation Status: Fed Late Due Date: Actions: Create Kit Competing Continuation Directed Supplement </p> <p>Project Liquidation Date:</p> <p>Actions: Award Summary Contact Management View Report Forms Change Project Locale Terms & Conditions Send Message Manage Project Abstract Task Management</p> </div>							
Orange Balls Support	Protection of Orange Balls for PURPLE	POBPOB11010	Test Organization	02/17/2011	02/28/2012	Received (Post Award Paper Submission)	[Icons]
Orange	Protection of Orange		Test			No Existing	

Figure 1-6 Grants List prior release view

[Print Help](#)

Grants List

Default / Selected Search Criteria Grant Number: 105 [Search]

Assignment Type: My Grants Expired/Active: Active Projects Only Grant Number: 105

Search Inside Grid | Hide Columns

1 - 2 of 2 items | 10 | 25 | 50

Program Office	Grant Program	Grant Number	Organization	Project Period Start Date	Project Period End Date	Amendment Status	Actions
Orange Balls Support	Protection of Orange Balls for PURPLE	POBPOB110105	Test Organization	02/17/2011	02/28/2012	Multiple Amendments In-Progress	[Icons]
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Project Title: TEST 2 for Purple Federal Budget: \$2,000 Budget Period: 1 Start Date: 02/17/2011 End Date: 02/16/2012 Last Issued Award: Grant Number: 1 POBPOB110105-01-00 Issued Date: 05/18/2011 Amendment Number: 0 Terms &</p> <p>Project Locale: AquaProjectLocaleGlobal Categories: None Non Competing Continuation Status: Fed Late Due Date: Actions: Create Kit</p> <p>Project Liquidation Date:</p> <p>Actions: Award Summary Contact Management View Report Forms Change Project Locale Terms & Conditions Send Message Manage Project Abstract Task Management</p> </div>							

[Export Results](#) | [Manage Assignments](#)

Legend: [Icons]

Figure 1-7 Grants List current release view (Default)

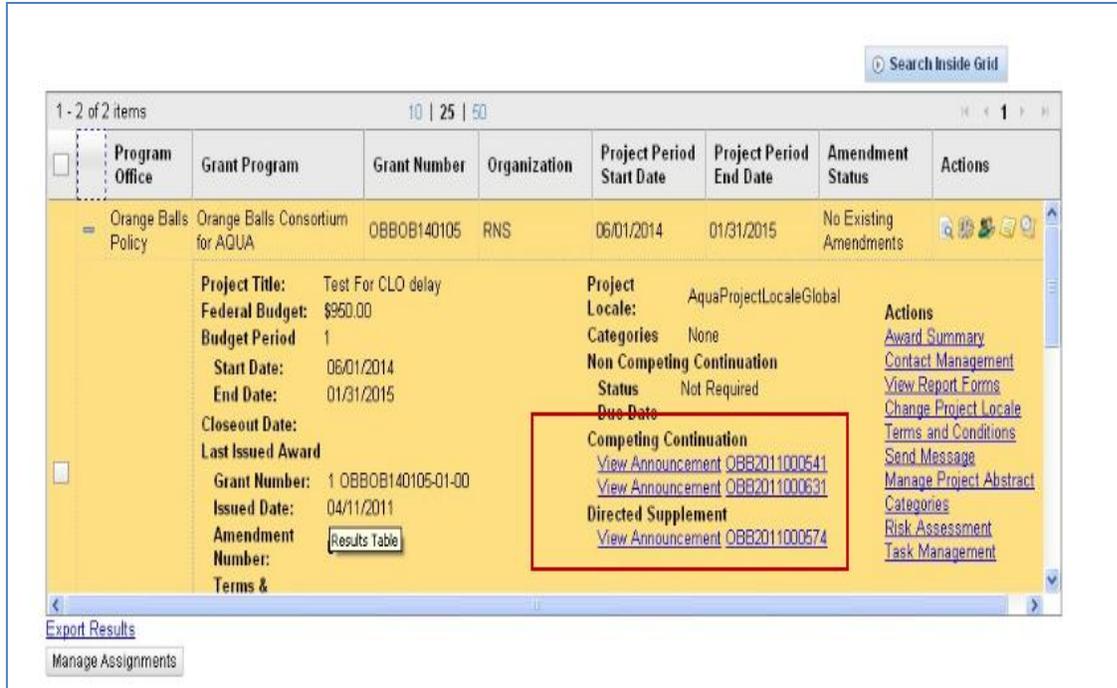


Figure 1-8 Grants List current release view associated with competing continuation or directed supplement

Funding Memo Decimal Error Correction

When a user has entered decimal amounts into the Funding Memo screen; the previous release would generate a standard System Errors. GS 3.21 will allow both dollar and cents entry into the Funding Memo columns without errors.

RECOMMENDED FUNDING				
FINANCIAL ASSISTANCE				
	Federal Amount	Non-Federal Amount	Total Amount	Purpose
Basic Operations	44.25	10.11	\$54.36	
Special Projects	0.00	0.00	\$0.00	
Other Special Projects	0.00	0.00	\$0.00	System error from decimal entry
Other Projects	0.00	0.00	\$0.00	
Other	0.00	0.00	\$0.00	
Other	0.00	0.00	\$0.00	
Other	0.00	0.00	\$0.00	
Other	0.00	0.00	\$0.00	
Other	0.00	0.00	\$0.00	
TOTAL	54.25	10.11	64.36	

Figure 1-9 Funding Memo decimal error

Budget Worksheet Improvements

This new release includes several enhancements which will improve the user experience when working with the Budget Worksheet. These new are illustrated below:

Indirect Costs

When one enters INDIRECT COSTS from the Budget Worksheet, the system previously populated additional text on line K of the Notice of Grant Award (NGA) Edit and PDF screens.

11. APPROVED BUDGET (Excludes HHS Direct Assistance) I HHS Grant Funds Only II Total project costs including grant funds and all other financial participation		12. AWARD COMPUTATION FOR GRANT a. Amount of HHS Financial Assistance (from item 11m) 25,015.01 b. Less Unobligated Balance From Prior Budget Periods 0.00 c. Less Cumulative Prior Award(s) This Budget Period 0.00 d. AMOUNT OF FINANCIAL ASSISTANCE THIS ACTION 25,015.01 13. Total Federal Funds Awarded to Date for Project Period 25,015.01 14. RECOMMENDED FUTURE SUPPORT (Subject to the availability of funds and satisfactory progress of the project): <table border="1"> <thead> <tr> <th>YEAR</th> <th>TOTAL DIRECT COSTS</th> <th>YEAR</th> <th>TOTAL DIRECT COSTS</th> </tr> </thead> <tbody> <tr> <td>a. 2</td> <td></td> <td>d. 5</td> <td></td> </tr> <tr> <td>b. 3</td> <td></td> <td>e. 6</td> <td></td> </tr> <tr> <td>c. 4</td> <td></td> <td>f. 7</td> <td></td> </tr> </tbody> </table> 15. PROGRAM INCOME SUBJECT TO 45 CFR PART 74, SUBPART F, OR 45 CFR 92.25, SHALL BE USED IN ACCORD WITH ONE OF THE FOLLOWING ALTERNATIVES: a. DEDUCTION b. ADDITIONAL COSTS c. MATCHING d. OTHER RESEARCH (Add / Deduct Option) e. OTHER (See REMARKS)		YEAR	TOTAL DIRECT COSTS	YEAR	TOTAL DIRECT COSTS	a. 2		d. 5		b. 3		e. 6		c. 4		f. 7	
YEAR	TOTAL DIRECT COSTS	YEAR	TOTAL DIRECT COSTS																
a. 2		d. 5																	
b. 3		e. 6																	
c. 4		f. 7																	
a. Salaries and Wages 25,000.00 b. Fringe Benefits 0.00 c. Total Personnel Costs 25,000.00 d. Equipment 0.00 e. Supplies 0.00 f. Travel 0.00 g. Construction 0.00 h. Other 0.00 i. Contractual 0.00 j. TOTAL DIRECT COSTS 25,000.00 k. INDIRECT COSTS 300.15 (rate 5% of TADC) 15.01 l. TOTAL APPROVED BUDGET 25,015.01 m. Federal Share 25,015.01 n. Non-Federal Share 0.00			16. THIS AWARD IS BASED ON AN APPLICATION SUBMITTED TO, AND AS APPROVED BY, HHS ON THE ABOVE TITLED PROJECT AND IS SUBJECT TO THE TERMS AND CONDITIONS INCORPORATED EITHER DIRECTLY OR BY REFERENCE IN THE FOLLOWING: a. The grant program legislation cited above. b. The grant program regulations cited above. c. This award notice including terms and conditions, if any, noted below under REMARKS. d. HHS Grants Policy Statement including addenda in effect as of the beginning date of the budget period. e. 45 CFR Part 74 or 45 CFR Part 92 as applicable. In the event there are conflicting or otherwise inconsistent policies applicable to the grant, the above order of precedence shall prevail. Acceptance of the grant terms and conditions is acknowledged by the grantee when funds are drawn or otherwise obtained from the grant payment system.																
REMARKS (Other Terms and Conditions Attached - <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No)																			

Figure 1-10 Indirect Costs additional text displayed on NGA

The new enhancement will allow Indirect cost rate to be displayed on the NGA screen if the user chooses the same method and same rate for all the rows and across all the tabs.

The screenshot shows the GrantSolutions web application interface. The top section displays the Budget Worksheet with the following data:

a. Salaries and Wages	25,000.00
b. Fringe Benefits	0.00
c. Total Personnel Costs	25,000.00
d. Equipment	0.00
e. Supplies	0.00
f. Travel	0.00
g. Construction	0.00
h. Other	0.00
i. Contractual	0.00
j. TOTAL DIRECT COSTS	25,000.00
k. INDIRECT COSTS	300.15 (rate 5% of TADC)
l. TOTAL APPROVED BUDGET	25,015.01
m. Federal Share	25,015.01
n. Non-Federal Share	0.00

The bottom section displays the NGA screen with the following data:

a. Amount of HHS Financial Assistance (from item 11m)	\$25,045.02
b. Less Unobligated Balance From Prior Budget Periods	\$0.00
c. Less Cumulative Prior Award(s) This Budget Period	\$0.00
d. AMOUNT OF FINANCIAL ASSISTANCE THIS ACTION	\$25,045.02

Under section 14. Recommended Future Support, there is a table for years 2-7 with total direct costs. Below that, section 15. PROGRAM INCOME SUBJECT TO 45 CFR PART 74, SUBPART F, OR 45 CFR 92.25, SHALL BE USED IN ACCORD WITH ONE OF THE FOLLOWING ALTERNATIVES: shows radio buttons for DEDUCTION, ADDITIONAL COSTS, MATCHING, and OTHER RESEARCH (Add / Deduct Option).

Figure 1-11 Indirect cost rate displayed on NGA

In all other situations the override method is checked on the edit NGA and no rate is displayed. This will be the default method.

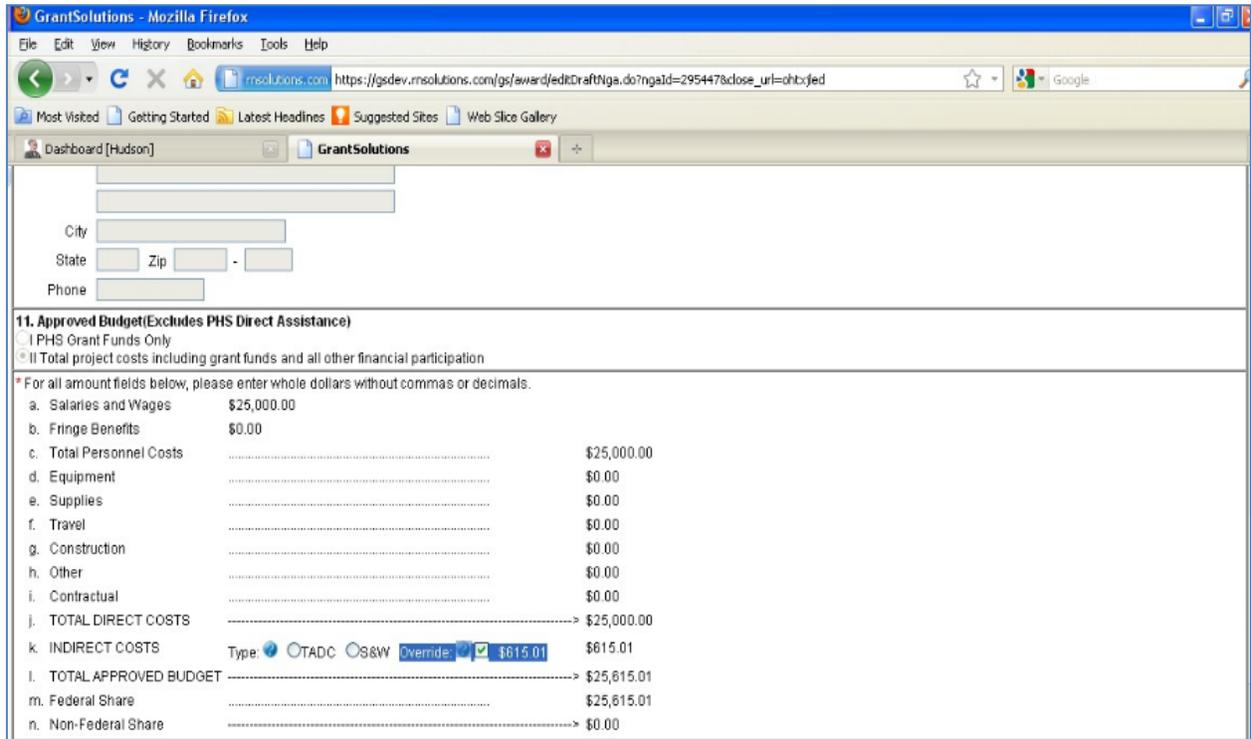


Figure 1-12 Budget worksheet default screen

Printing PDF documents

When "Print" was clicked on a Budget Worksheet, it opened up a new window but was unable to generate a printable PDF document when using the Internet Explorer (IE) browser. This would cause an IE certificate error as seen in the screenshot below.



Figure 1-13 Print PDF Error

The new release will allow The 'Print' PDF to be implemented for Internet Explorer.

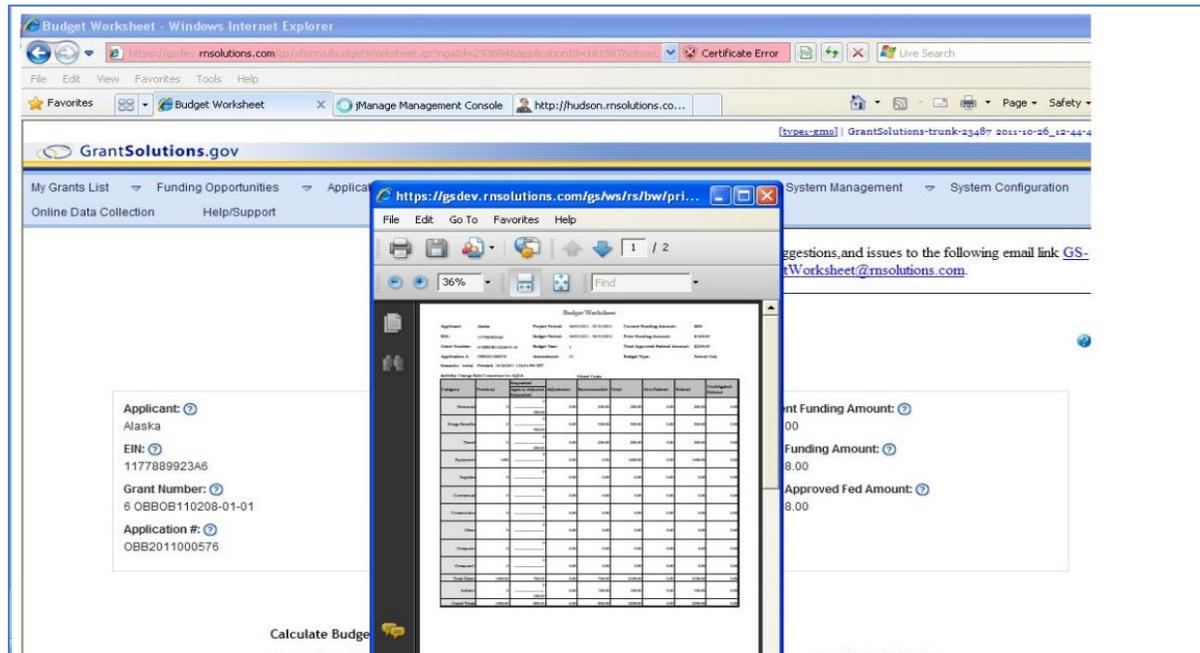


Figure 1-14 Print PDF Improvement

Budget Type

Currently the budget type of a Budget Worksheet is always fetched from the grant program settings for both amendments and the award. Since the user can change the budget type dynamically within the Budget Worksheet this action can create a problem in the amended budget worksheet if the budget type of the previous award contradicts the grant program settings

To avoid this confusion, the amendment budget worksheet will inherit the budget type (Total Cost or Federal Only) of the **previous award type by default** and only initialize the type based on the grant program setting for a new award.

New Indirect Cost Field Default

When you add an indirect cost row to the earlier budget worksheet releases, the default month is 11. This release will allow the default field to be 12.

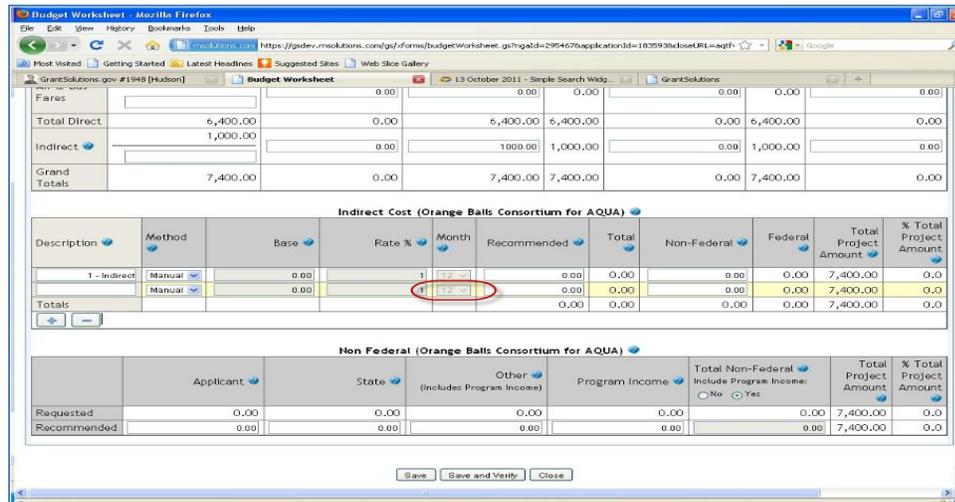


Figure 1-15 New Budget Worksheet Month Default

Correction of Decimal Mismatch for Amendments

When a user creates an amendment, the Previous Award (Doesn't Include Non-Federal) figures did not populate with correct decimal format and thus did not match the Federal amount. This decimal mismatch prevents the creation of a zero amendment; and miscalculation and confusion on obligation and de-obligation amendments. See illustration below:

Note: To include UOB Reprogram/Carryover Money respective to this Amendment, increase the Total Budget by that amount

Final Budget Totals	
Total Budget	31,001.34
Non-Federal (May Include Program Income)	3000.00
Federal	28,001.34
Unobligated Funds - Reprogram	0.00
Unobligated Funds Offset	0.00
In Kind Contribution	0.00
Program Income	0.00
Previous Award (Doesn't Include Non-Federal)	28,001.00
Total This Action	0.34

Fed Negotiator	
Grantee Negotiator	
Start By:	ADenali 11/01/2011 01:30:55 PM
Last Update By:	

Figure 1-16 Decimal mismatch on carryover figures

The new release will allow previous Award to be populated with correct decimal format and allowing net zero change in the total action calculation.

Enhancements

Change Award Workflow Action in Background

Award processing will be accomplished via asynchronous processes in order to avoid the time out issue and user requirement to refresh page to view updated statuses. This new enhancement also provides better alignment on the IE page as illustrated below:



Figure 1-17 New IE enhancements

In addition an error message is now displayed to inform the user that an action to an award has been placed already in the system queue as illustrated below:

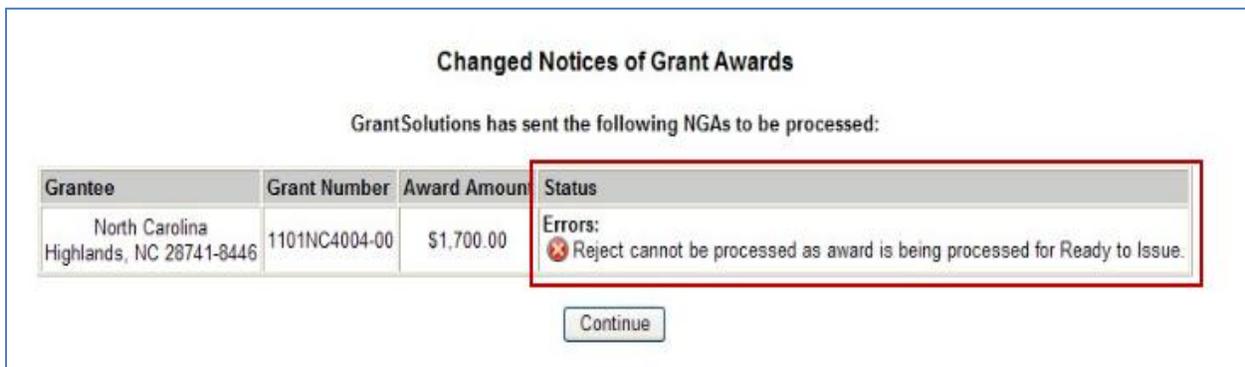


Figure 1-18 New Error Message for system queue

New Workflow State Action Link

A new feature has been added to GrantSolutions that provides users the ability to see which users and authorities can perform the current action within the workflow process. The new link, **Next Workflow Action**, is visible in the workflow status column of both the Funding Memo and Award List screens.

When a user clicks the **Next Workflow Action** link, the name and email of address of existing personnel who can perform the current action(s) and move the award or application to the next state is displayed.

Please Note: *This new **Next Workflow Action** link will display as new applications and awards enter the workflow process. It will not display for existing awards and applications that entered the workflow prior to the new release.*

As an example, on the Award List screen below the current workflow status of the award shows “Ready for Approval”. (The current user is logged into GS with the GMO role.) When the user clicks the **Next Workflow Actions** link, a window is displayed which lists the possible workflow transitions at the top. It then displays a list of names and email addresses of all personnel who can perform the current action(s), grouped by workflow transition type.

In the example below, you will see a list of GMOs who may mark the award “Ready for Approval”, a list of GMSs who may mark the award “Ready for Review”, and so on.

Grantee Name	Grant Number	Total Approved	Application # Application Type Funding Level Application Notes	Budget Start Date	Budget End Date	Last Updated By/Date	Workflow Status	Change Workflow Status	Action
Central State University	Support Year: 3 Revision Num: 0	\$300,000.00	NCA \$300,000.00 View Funding Memo Application Notes	02/01/2012	01/31/2013	Shervonne Randall-gms 02/01/2012	Drafted History Next Workflow Actions	Ready for Approval	Edit Delete View/Print Organization Select Org Address Grant Assignments Budget Worksheet Terms and Conditions View History Award Summary Manage Project Abstract

Next Workflow Actions for Application Number: YEP2012000308

Possible workflow transitions include: **Ready for Approval, Ready for Review**

Ready for Approval can be performed by the following **GMOs**:

Bettencourt, Alice	stage_295703@stage.xyz
Brunson, Roscoe	stage_311502@stage.xyz
Fuller, R	stage_294242@stage.xyz
Fuller, Robin	stage_282242@stage.xyz
West, Eric	stage_5381@stage.xyz

Ready for Approval can be performed by the following **GOCs**:

No users are assigned at this authority level

Ready for Review can be performed by the following **GMSs**:

Darling, Nina	stage_39366@stage.xyz
Davenport, Constance	stage_292893@stage.xyz
Donaldson, Brenda	stage_135924@stage.xyz
Dortch, Ronald	stage_249735@stage.xyz
Griffiths, Margaret	stage_12770@stage.xyz
Hall-Shields, Jessica	stage_43318@stage.xyz
Hayes, Deborah	stage_235169@stage.xyz
Osborne, Amanda	stage_109805@stage.xyz
Perez, Dixie	stage_2792@stage.xyz
Pouncy, Zenobia	stage_213173@stage.xyz

Figure 1-19 New Workflow State

In addition to Pre Award processing, this new workflow status will be applicable to Post Award Functions including amendments and non-compete continuations; and including process states when dealing with Bypass with Funding, Bypass without Funding and Create.

TAGGS - Affordable Care Act (ACA)

Release 3.21 will include an added new Legislative Initiative Indicator field at financial account level to include in HHS TAGGS file for ACA. TAGGS has required another field to be included in all TAGGS report submissions, which they have entitled Legislative Initiative Indicator. It is merely a flag on the financial account to indicate what Legislative Initiative that financial account is funding. Currently, TAGGS has only requested that Financial Accounts for the Affordable Care Act (ACA) be flagged using the new Legislative Initiative Indicator. This change will only impact HHS partners, and their Financial Management Officers. All prior year accounts, and the TAGGS reports associated with them, will be handled by the TAGGS team, so no action is necessary on the part of the Financial Management Officer.

The Center of Excellence has obtained a list of current FY (2012) Financial Accounts that are used to fund Affordable Care Act grants, and will update all such accounts in the system. Any new accounts put in by the Financial Management Officer will need to be configured by the Financial Management Officer as an account used for funding ACA grants or not. This is done by simply clicking the check box, as seen below:"

Add Financial Account - Orange Balls

* Account Number:

* Fiscal Year:

* Authorization:

* Program(s): Orange Balls Consortium for ORANGE - T1
 AquaTest
 Protection of Orange Balls - PURPLE -1
 Orange Balls II Consortium for AQUA
 Orange Balls Selenium Test
 Orange Balls Assistance Red-T1
(Limit 2000 characters)

Purpose/Comment:

Recovery Act Flag:

Affordable Care Act Flag:

* Treasury Account Code:

Treasury Sub Account Code:

Appropriation Number:

Allotment Number:

Allowance Number:

Account Name:

Figure 1-20 New TAGGS Checkbox

Pre-Complete Delay changes

For Release 3.21 the Pre-Complete Delay Layer will be calculated from the date and time that the award is issued by the respective officer.

In addition to the new Pre-complete Delay action, a new workflow state will be created as well. Several examples of this new state are illustrated below.

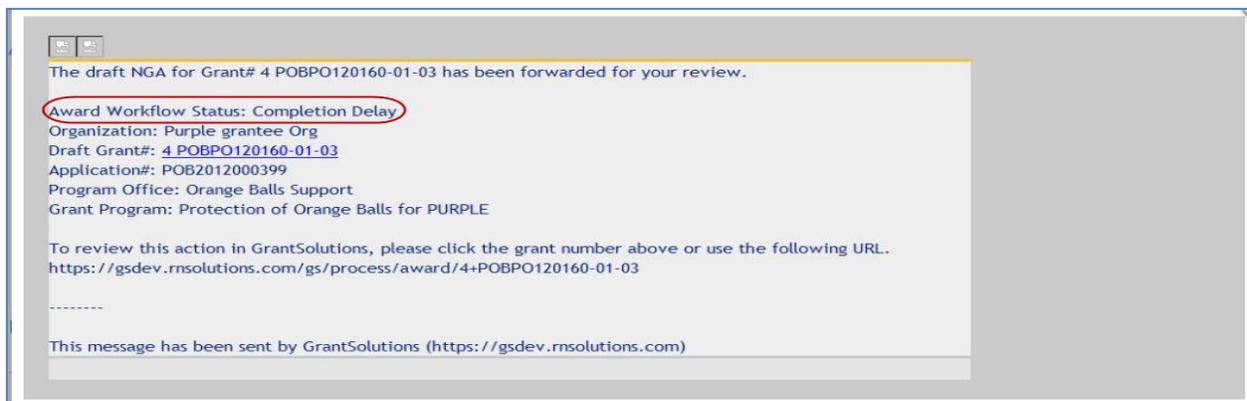


Figure 1-21 Email notice for Pre-complete Delay

Search												
Please enter search criteria above.												
Project	Grantee Name	Grant Number	Total Approved	Application # Application Type Funding Level Application Notes	Budget Start Date	Budget End Date	Last Updated By/Date	Workflow Status	Change Workflow Status	Action		
<input type="checkbox"/>	Purple grantee Org	4 POBPO120160-01-03 Support Year: 1 Revision Num: 3	\$1,000,003.00	POB2012000399 Administrative /Suppliment Decrease \$1,000,003.00 View Prior Approval Memo Application Notes	11/28/2011	11/28/2012	GrantSolutionsEntity / 11/29/2011	Waiting for Completion History (expire=GMO,GQC,GMS)	Expire Pre-Complete Delay	View/Print View Last NGA View Grant Assignments Budget Worksheet View History Award Summary Manage Project Abstract		
Expire Pre-Complete Delay												

Figure 1-22 Grant Award Screen Workflow Status Pre-complete Delay

Award Workflow History

Organization Name: Purple grantee Org
 Process Id: 40489731
 Start Date: 11/29/2011 12:01 PM (GMT - 05:00) Eastern Time (US & Canada)
 Grant Number: 1 POBPO110156-01-00
 Grant Program: Protection of Orange Balls for PURPLE
 Initiator: ype1-gmo, test

User	Action	Task	Completed Date	Action Comments	Status
		Completed	11/29/2011 02:07 PM (GMT - 05:00) Eastern Time (US & Canada)		
GrantSolutions		Waiting for Completion	11/29/2011 02:08 PM (GMT - 05:00) Eastern Time (US & Canada)		
GrantSolutions		Sent to Accounting	11/29/2011 02:04 PM (GMT - 05:00) Eastern Time (US & Canada)		
test ype1-gmo	Issue	Issue	11/29/2011 01:07 PM (GMT - 05:00) Eastern Time (US & Canada)		
test ype1-gmo	Ready for Approval	Draft Review	11/29/2011 12:06 PM (GMT - 05:00) Eastern Time (US & Canada)		

[Close](#)

Figure 1-23 Workflow history for Pre-award Delay