



# GrantSolutions Grants Management Module

Grantee Guide

August 2018

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## Introduction

### GRANTSOLUTIONS

GrantSolutions serves as one of three consortia leads under the Grants Management Line of Business (GMLoB) E-Gov initiative offering government-wide grants management system support services. The GrantSolutions Grants Management Module (GMM) is a role-based comprehensive grants management system.

### GRANTSOLUTIONS GMM

The GrantSolutions GMM is a web based system that provides a way for grant recipients to view/print their grant awards, submit post-award actions such as amendments, apply for non-competing continuations and directed supplements, submit reports, etc. Please contact the awarding agency for direction on the types of actions to perform in the system.

### THE GRANTSOLUTIONS PUBLIC WEBSITE

To access the GrantSolutions GMM, connect to the Internet, open a web browser such as Internet Explorer, Chrome, or Mozilla Firefox, and go to <http://www.grantsolutions.gov>.

The GrantSolutions public website appears.

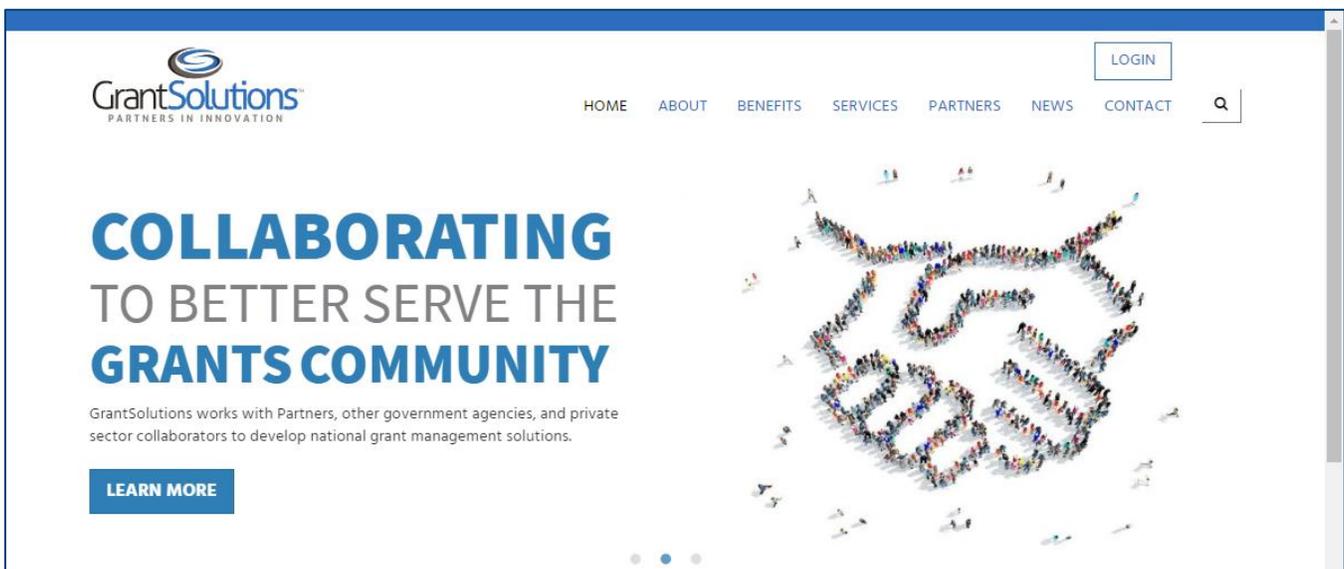


Figure 1: GrantSolutions public website

This website contains useful information, including:

- Login button to GrantSolutions
- Help Desk contact information and hours
- Frequently Asked Questions
- GrantSolutions Grantee training videos
- User Account Request Forms

Getting Started – Request a User Account Form

The *Grantee User Account Request Form* must be completed and submitted for each user requiring a new GrantSolutions GMM account. Forms are also submitted for account changes, and to delete access to the system.

To access a copy of the form from the GrantSolutions website:

1. Scroll to the middle of the “Home” page ([www.grantsolutions.gov](http://www.grantsolutions.gov)) and click the link **Request a User Account**.

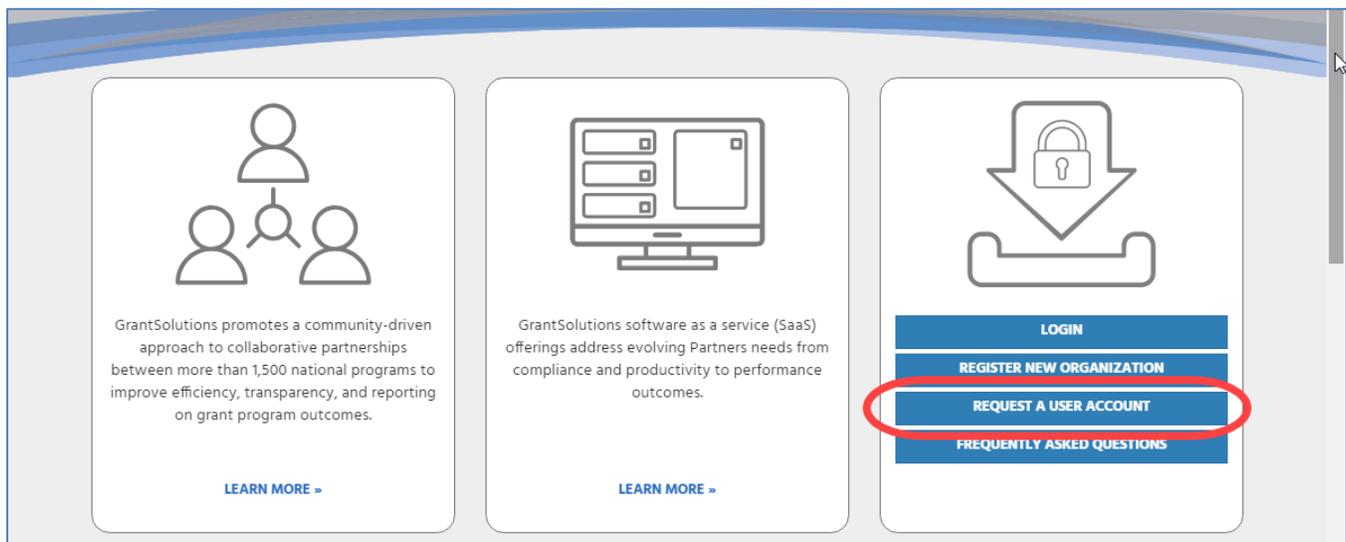


Figure 2: GrantSolutions Public Home Page– Request a User Account link

2. The “Getting Started – Request a User Account” screen displays. Under the heading *Recipient User*, click the link **Recipient User Account Request Form**.

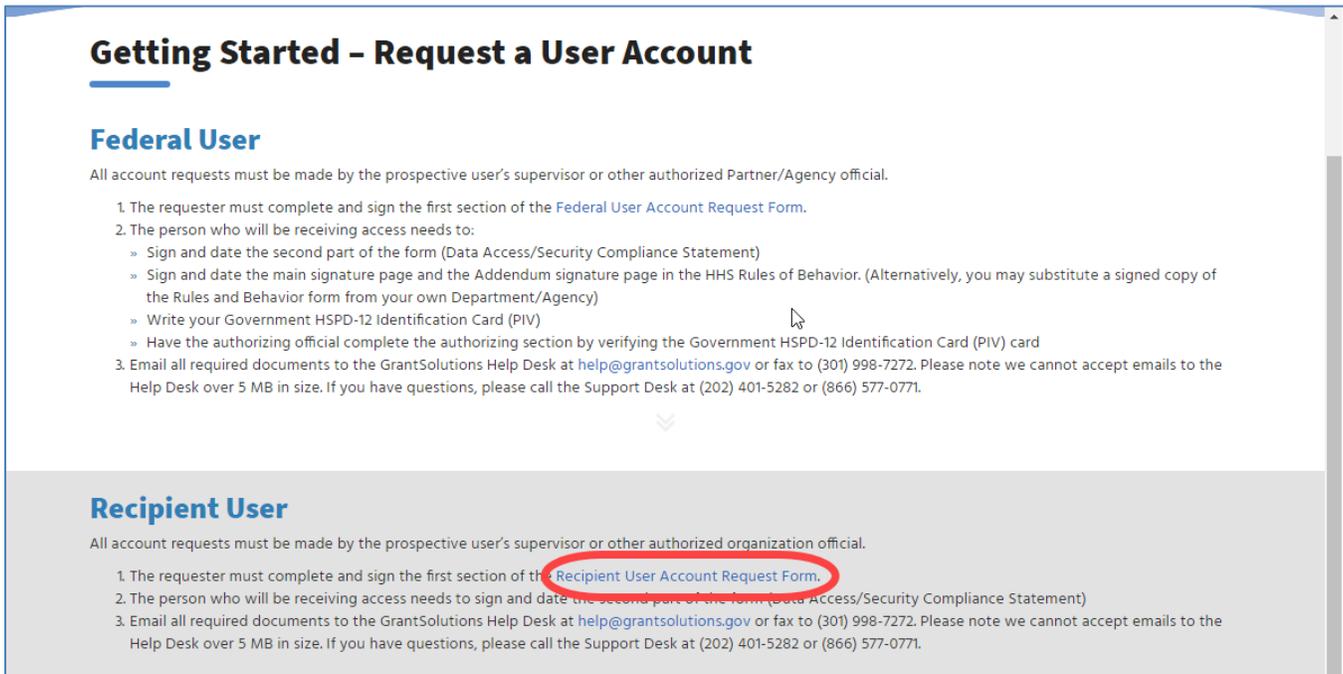


Figure 3: Getting Started – Request a User Account screen

3. Follow the instructions to complete and submit the form and adhere to any guidance provided by the awarding agency.

Please note that the GrantSolutions Help Desk cannot accept emails over 5 MB in size.

Once an account is created, the user receives two automatically generated emails from GrantSolutions. The first email contains a username and a link to GrantSolutions.gov. The second email contains a temporary password.

*Tip: Usernames are NOT case sensitive. Passwords ARE case sensitive.*

*GrantSolutions Roles*

GMM is a role-based system, which means users may only perform actions to which they have been given permission. By default, all Grantee roles can electronically submit applications. However, Grantors can restrict Grantee roles from submitting applications based on their grants policy.

The available Grantee roles are as follows:

Role	Actions
Grantee Administrative Official (ADO)	<p>The Grantee Administrative Official (ADO) is responsible for the oversight of activities performed by the Grantee Security Monitor.</p> <ul style="list-style-type: none"> <li>• Accept award on behalf of organization</li> <li>• Submit Applications/Amendments</li> <li>• Submit Federal Financial Reports</li> <li>• View Awards</li> </ul>
Principal Investigator/Program Director (PI/PD)	<p>The Principal Investigator/Program Director (PI/PD) is responsible for the oversight of activities performed by the Grantee Support Staff.</p> <ul style="list-style-type: none"> <li>• Submit Applications/Amendments</li> <li>• Submit Federal Financial Reports (FFR)</li> <li>• View Awards</li> </ul>
Grantee Support Staff (GSS)	<p>The Grantee Support Staff's role is to assist the Principal Investigator or Program Director in the Grantee organization.</p> <ul style="list-style-type: none"> <li>• View and submit Applications/Amendments</li> <li>• Enter FFR information but cannot submit</li> <li>• View Awards</li> </ul>
Grantee Financial Official (FO)	<p>The Grantee Financial Official (FO) is responsible for the oversight of activities performed by the Grantee Financial Support Staff.</p> <ul style="list-style-type: none"> <li>• Submit Applications/Amendments</li> <li>• Submit Federal Financial Reports</li> <li>• View Awards</li> </ul>
Grantee Financial Support Staff (FSS)	<p>The Grantee Financial Support Staff (FSS) role is to assist the Grantee Financial Official in the Grantee organization.</p> <ul style="list-style-type: none"> <li>• View and submit Applications/Amendments</li> <li>• Enter FFR information but cannot submit</li> <li>• View Awards</li> </ul>

### GrantSolutions Help Desk

The GrantSolutions Help Desk is available to assist Grantees with technical questions about the system.

**Email:** [help@grantsolutions.gov](mailto:help@grantsolutions.gov)

**Phone:** 202-401-5282 or 866-577-0771

**Hours:** Monday through Friday 7 a.m. to 8 p.m. ET excluding Federal holidays

Locate Help Desk contact information in a variety of ways:

- From the GrantSolutions “Contact” page

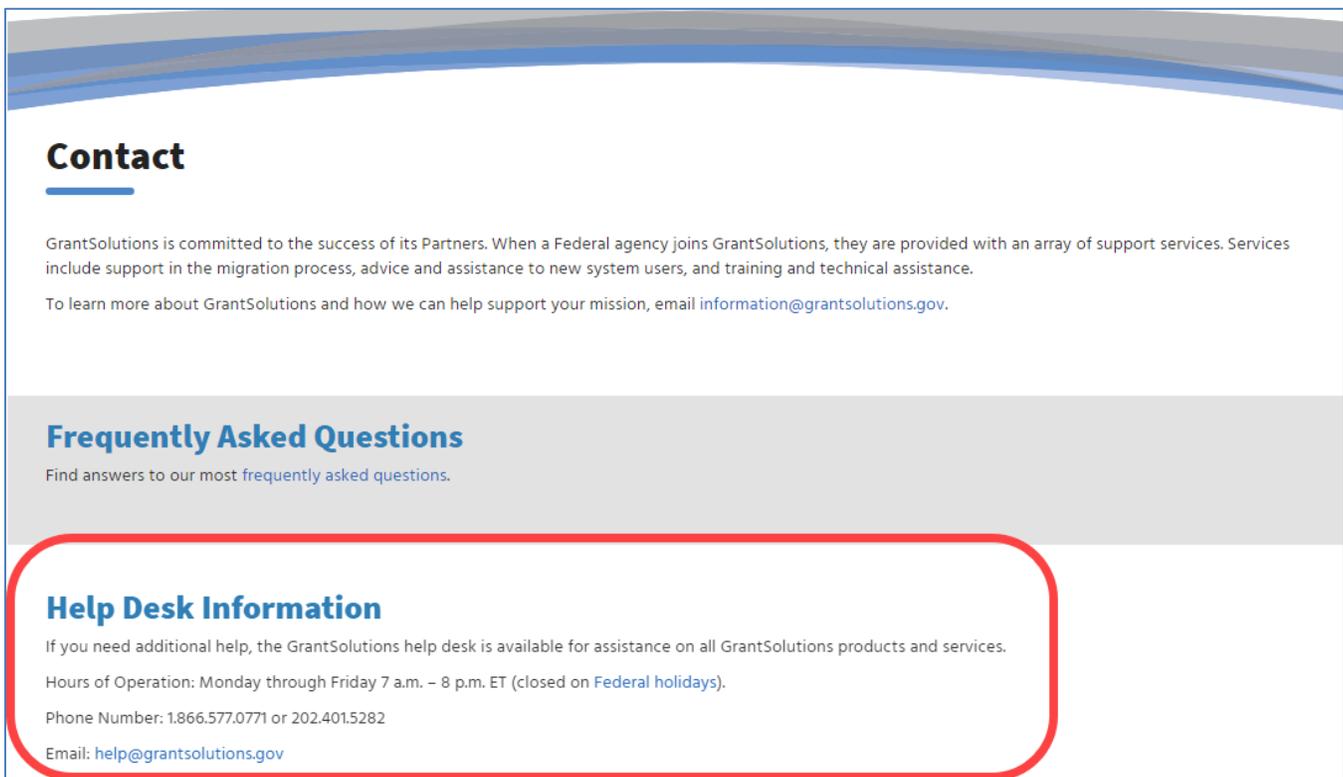


Figure 4: GrantSolutions Contact page – Help Desk Information

- At the bottom of every page when logged into the GrantSolutions GMM

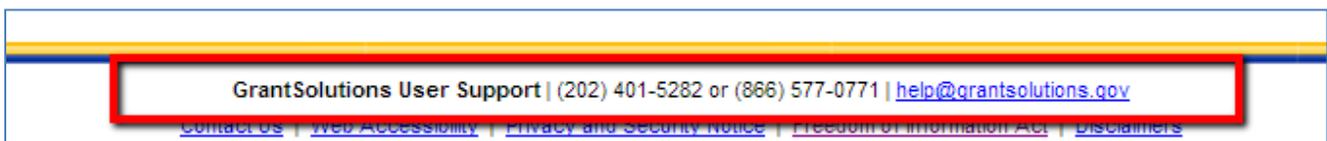


Figure 5: My Grants List screen - Footer

### Frequently Asked Questions

The Frequently Asked Questions page was created in response to inquiries on support, services, training, and the GrantSolutions GMM.

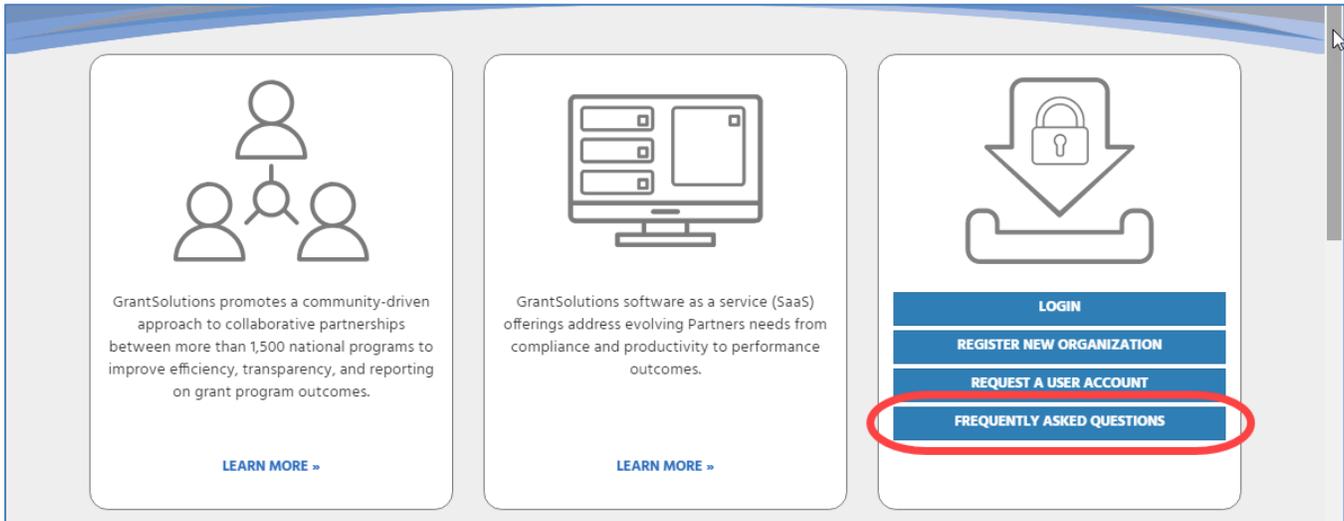


Figure 6: Home page - Frequently Asked Questions link

Search for questions and answers.

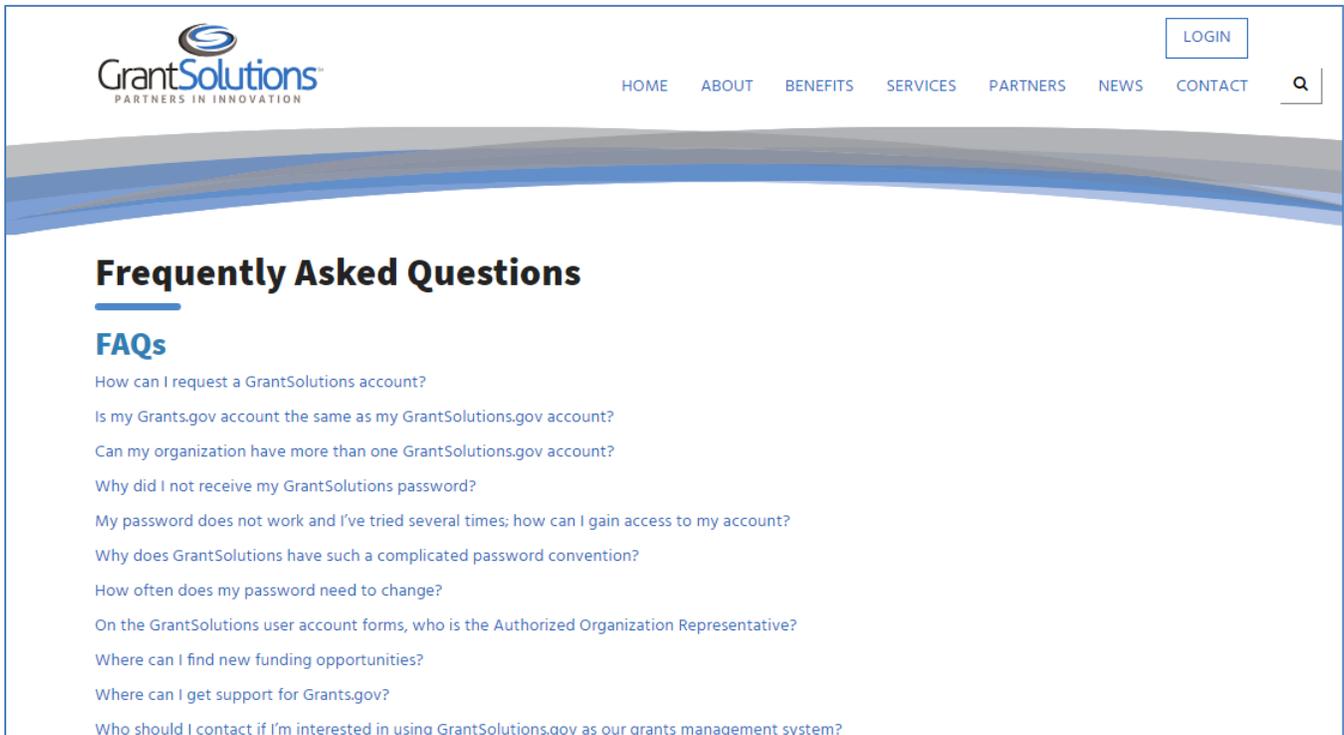


Figure 7: Frequently Asked Questions page

### Grantee Training Videos

A series of three Grantee training videos is available from the GrantSolutions public site. View the training sessions anytime as a quick start to GrantSolutions or as a refresher.

To access the videos, scroll to the bottom of the public website and click the link **Recipient Training Videos**.

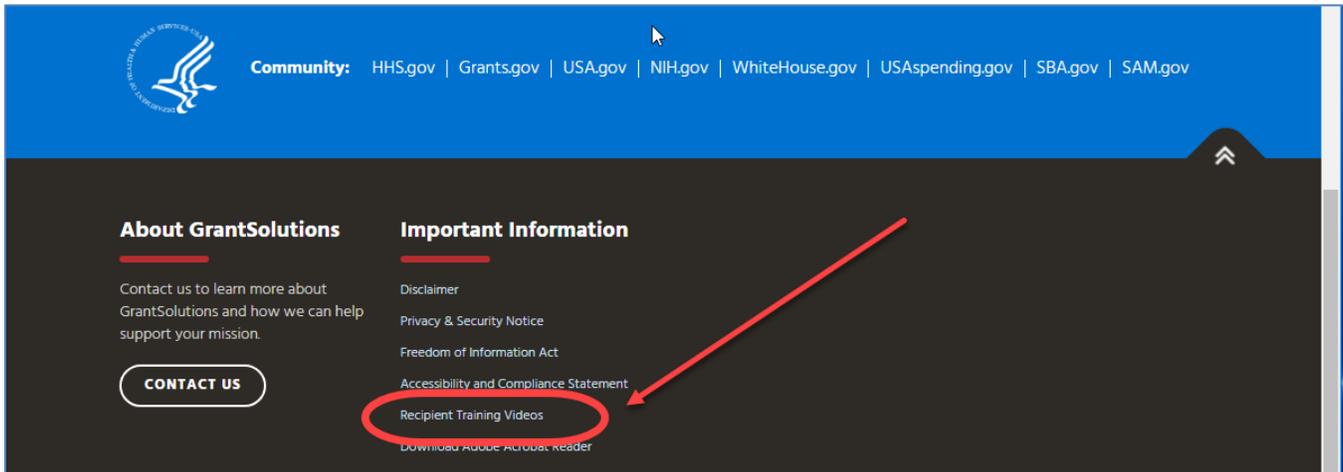


Figure 8: Grantee Training Videos

## GrantSolutions Login

To begin working with GrantSolutions, navigate to the login screen.

1. From an Internet browser (such as Internet Explorer), go to [www.grantsolutions.gov](http://www.grantsolutions.gov).
2. The “GrantSolutions” Home page appears. Click the **Login** button.



Figure 9: The GrantSolutions Home page – Login button

3. The “GrantSolutions” login screen displays.

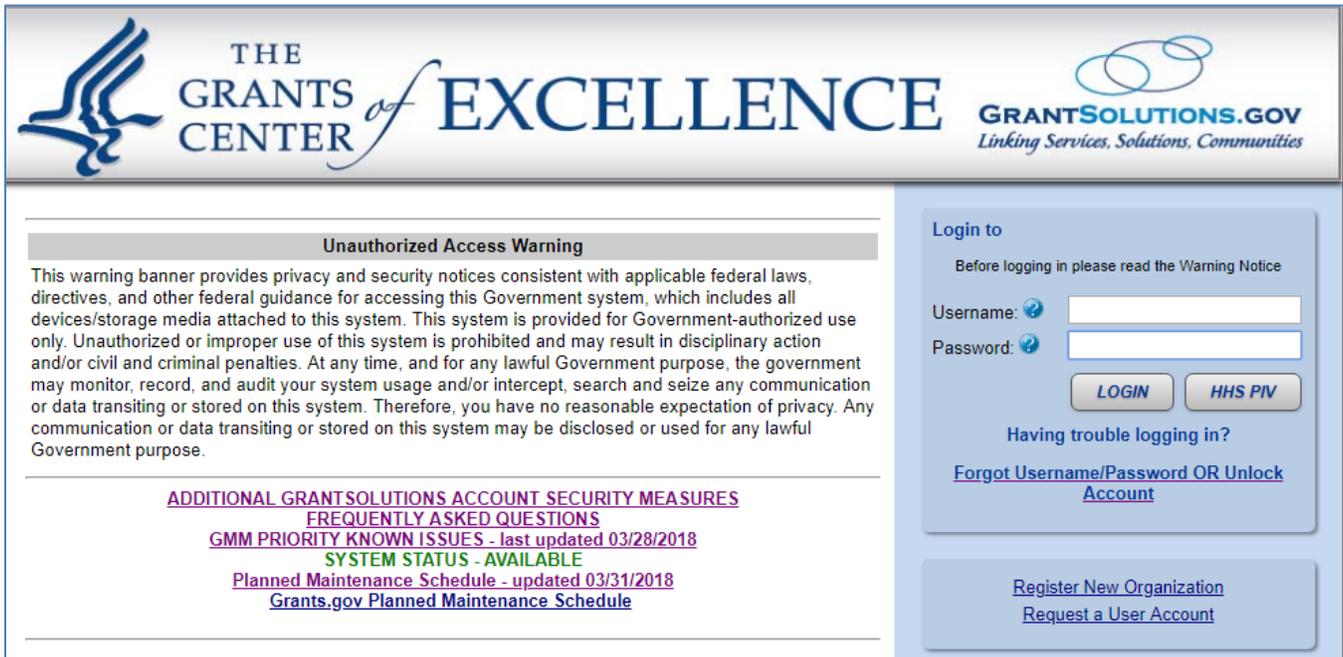


Figure 10: GrantSolutions login screen

## GRANTSOLUTIONS LOGIN SCREEN

The GrantSolutions login screen contains useful information, including:

- Planned maintenance schedule
- GMM Priority Known Issues
- Announcements
- Login section
- Forgot Username/Password or Unlock Account link

To log into the GrantSolutions GMM:

1. Enter your username in the **Username** field and the password in the **Password** field.
2. Click the **Login** button.

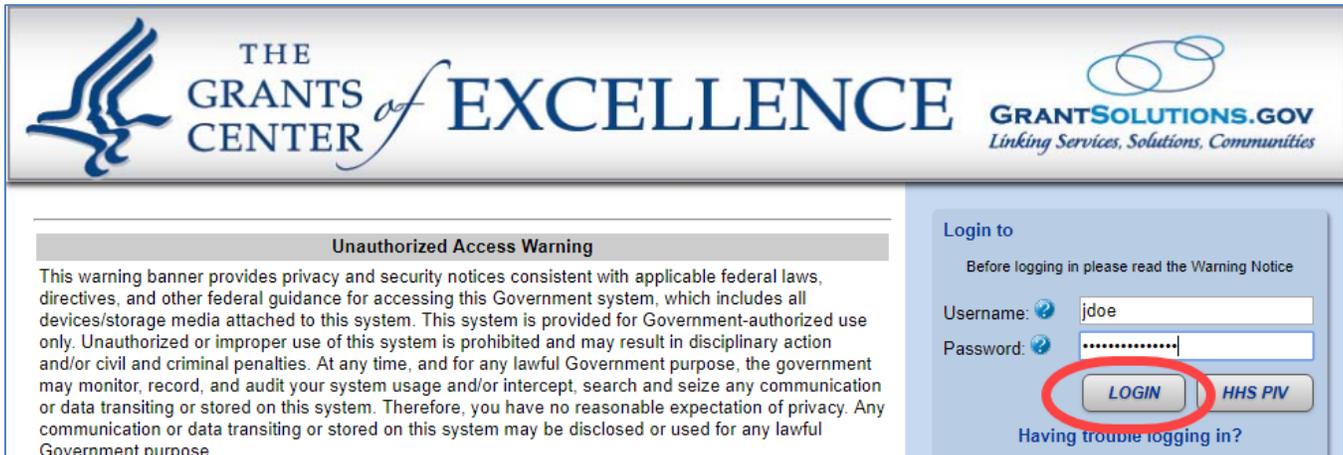
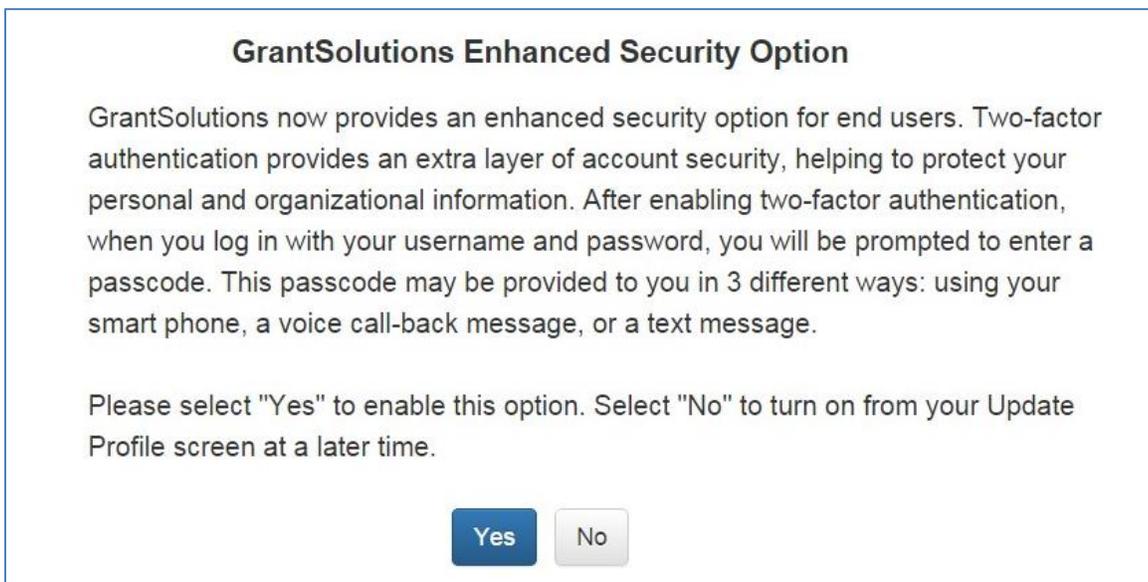


Figure 11: GrantSolutions Login screen

3. The first time a user logs into GrantSolutions, they are presented with the *GrantSolutions Enhanced Security Option* message. Click **Yes** to turn on two-factor authentication or click **No** to continue without enabling the feature.



For more information about two-factor authentication, go to Appendix A, Two-Factor Authentication.

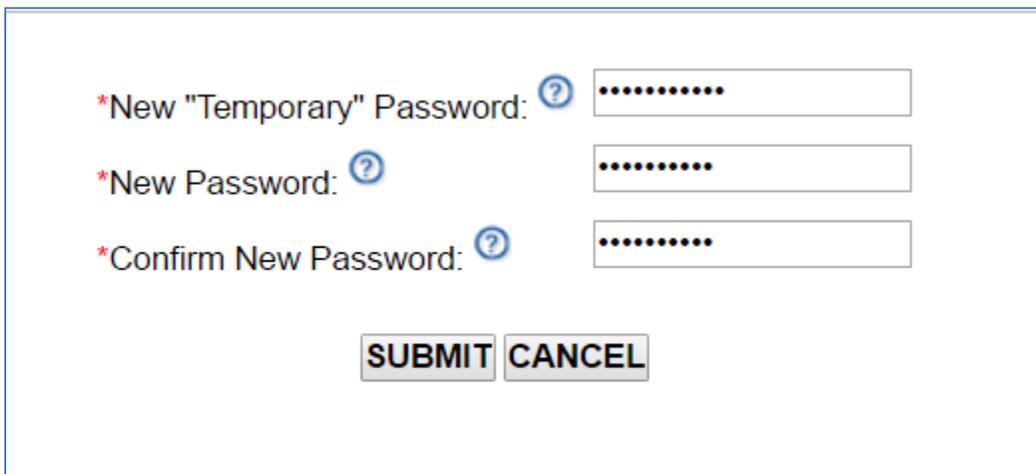
4. Additionally, first time users are required to change their password for security purposes.

Passwords must comply with the following policy requirements:

- The password must contain at least 8 characters
- At least one upper-case, one lower-case, one number, and one special character must be used. Special characters include: @ # \$ % & \* =? < >
- The password cannot be the same from your last 6 passwords, contain dictionary words, contain common names, contain all or part of your username, contain consecutive character strings (abcdefg, 12345678), contain simple keyboard(qwerty), or use special characters to replace letters to spell a word(P@ssword1)

Passwords remain valid for 60 days and users are prompted to change the password as the expiration date draws near.

5. When the “Change Password” screen appears, enter the **New “Temporary” Password**, a **New Password**, and **Confirm New Password**. Click the **Submit** button.



The screenshot shows a web form for changing a password. It contains three rows of input fields, each with a red asterisk and a blue question mark icon to its left. The first row is labeled '\*New "Temporary" Password:' and the second row is labeled '\*New Password:'. The third row is labeled '\*Confirm New Password:'. Each input field contains a series of black dots representing masked text. Below the input fields are two buttons: 'SUBMIT' and 'CANCEL'.

Figure 12: Change Password screen

- The GrantSolutions “Login” screen reappears. Enter your **Username** and the newly changed **Password**, and then click the **Login** button.



**Login to**

Before logging in please read the Warning Notice

Username:

Password:

**LOGIN** **HHS PIV**

[Having trouble logging in?](#)

Figure 13: GrantSolutions Login screen

- The “My Grants List” screen displays.



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Account Management Funding Opportunity Applications Grants Reports Online Data Collection

### My Grants List

**COE Training Center** [Show Expired Grants](#)

Grant Number:	90GH0001-00	<a href="#">View NGA</a>
Grant Program:	Assisting Others	<a href="#">Grant Notes</a>
Program Office:	Office of Assistance	<a href="#">History</a>
Project Title:	Planning Assistance for the Development of the Multi-Year Implementation Plan	<a href="#">Manage Amendments</a>
Award Issue Date:	09/21/2016	<a href="#">FFR</a>
Project Period:	12/01/2015 to 04/30/2017	<a href="#">Progress Reporting</a>
Budget Period:	12/01/2015 to 04/30/2017	
Total Approved Budget (Federal):	\$415,850	
Next T&C Due Date:	N/A	
Status:	No Existing Amendments	

Figure 14: My Grants List screen

## PASSWORD/UNLOCK ACCOUNT

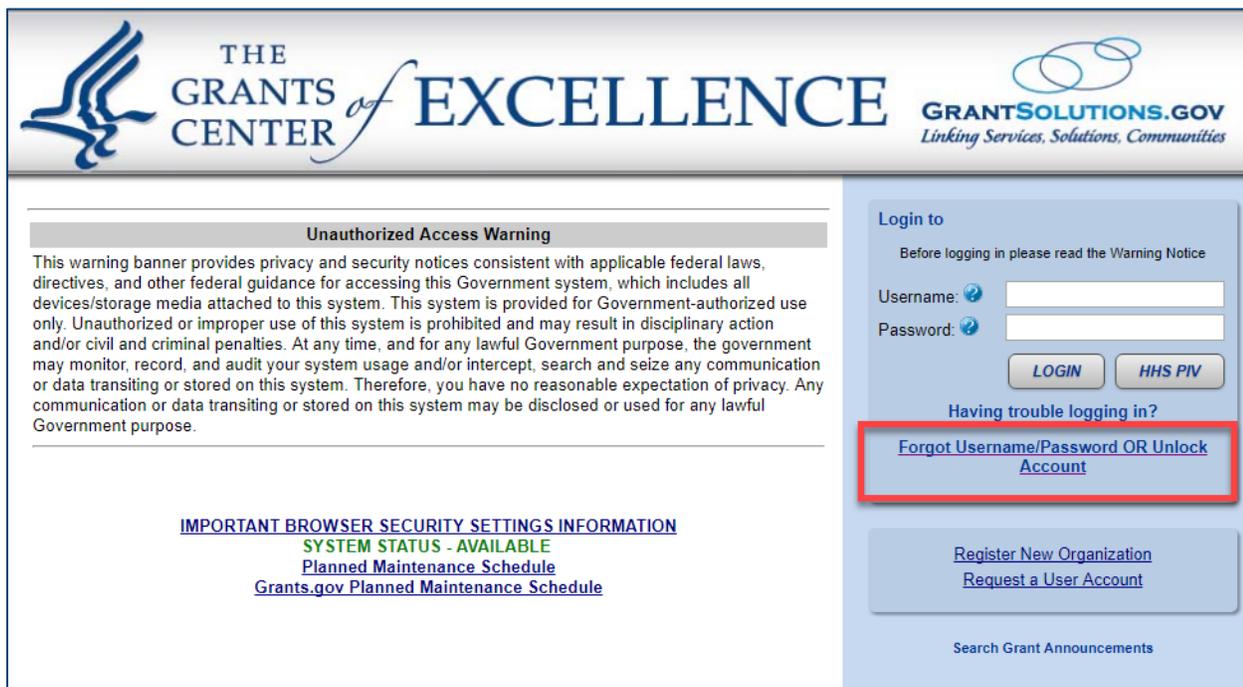
When an incorrect user name and password combination is entered, the system generates a login error. Upon three unsuccessful attempts, the account is locked.

To unlock an account, the user may perform one of the following actions:

- Click the **Forgot Username/Password OR Unlock Account** link from the “Login” screen to unlock their account and reset the password
- Contact the GrantSolutions Help Desk for assistance

To retrieve a username, reset a password, and unlock the account:

1. From the GrantSolutions “Login” screen, click the link **Forgot Username/Password OR Unlock Account**.



The screenshot shows the GrantSolutions login interface. At the top, there is a header with the logo for 'THE GRANTS CENTER of EXCELLENCE' and 'GRANTSOLUTIONS.GOV'. Below the header, there is a 'Login to' section with a warning notice, a 'Having trouble logging in?' section with a red box around the 'Forgot Username/Password OR Unlock Account' link, and a 'Register New Organization' section with a 'Request a User Account' link. There is also a search bar for 'Search Grant Announcements'.

Figure 15: Forgot Username/Password OR Unlock Account

2. The “Reset or recover your login settings” screen appears.

To reset the password and unlock the account from the *Forgot Password* section, enter your **Username**, registered **Email Address**, and click the **Reset Password** button.

**Tip:** To retrieve your username, enter the email address on file with GrantSolutions in the *Forgot Username* section, and click the **Send Usernames** button. Your username is then sent to your email address.

Figure 16: Reset Password/Unlock Account screen

3. The screen refreshes with a message stating:

A link has been emailed to: (email address) to reset your password and/or unlock your account. If you do not receive an email notification, please check your Spam or Junk email folder.

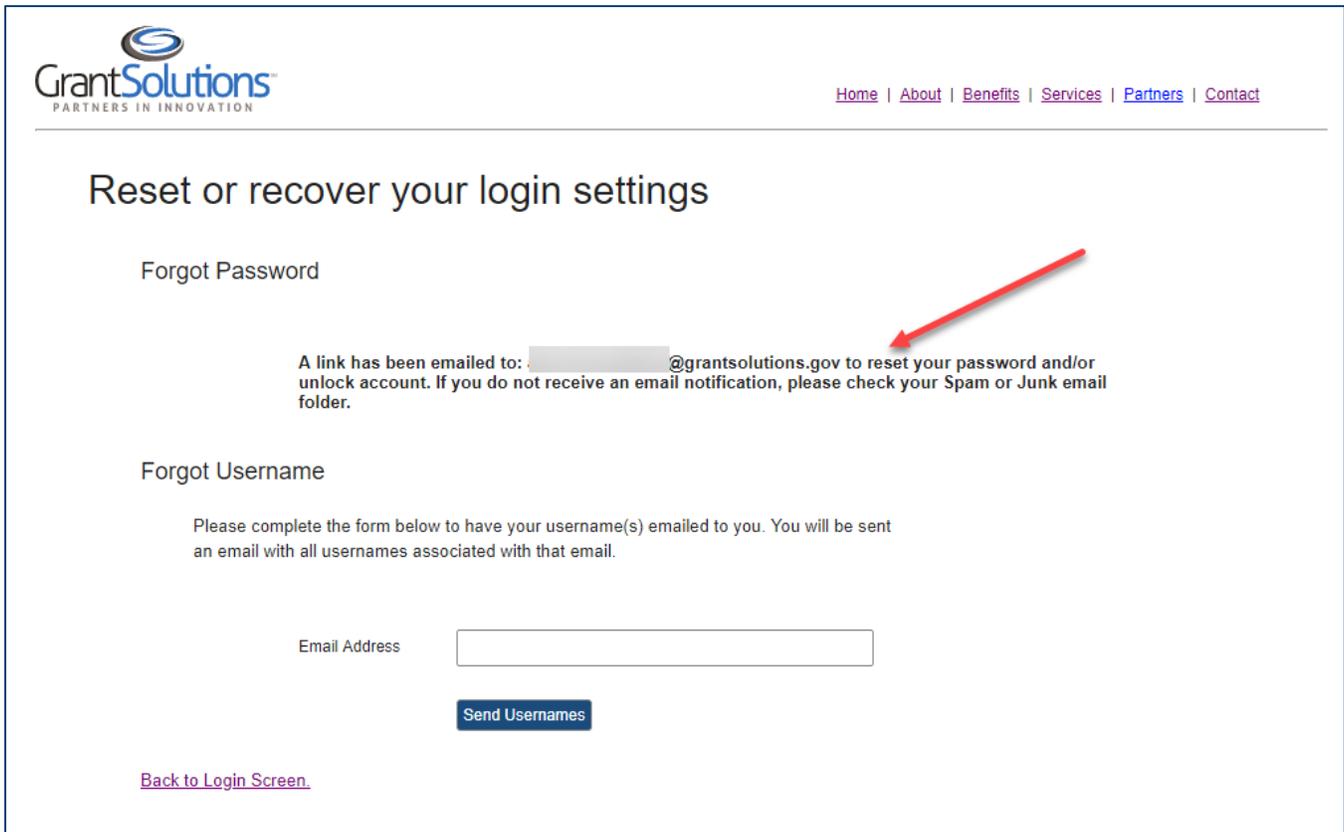


Figure 17: Password reset message

4. Go to your email system and open the new **GrantSolutions Password Reset** message from [noreply@grantsolutions.gov](mailto:noreply@grantsolutions.gov).

*Note: Ensure emails from @grantsolutions.gov are added to your email system's safe list so they do not get blocked or sent to the spam or junk folders.*

5. Click the link **Reset Password/Unlock Account**.

**Important!** Reset your password within 1 hour of receiving the password reset message, otherwise the link expires.

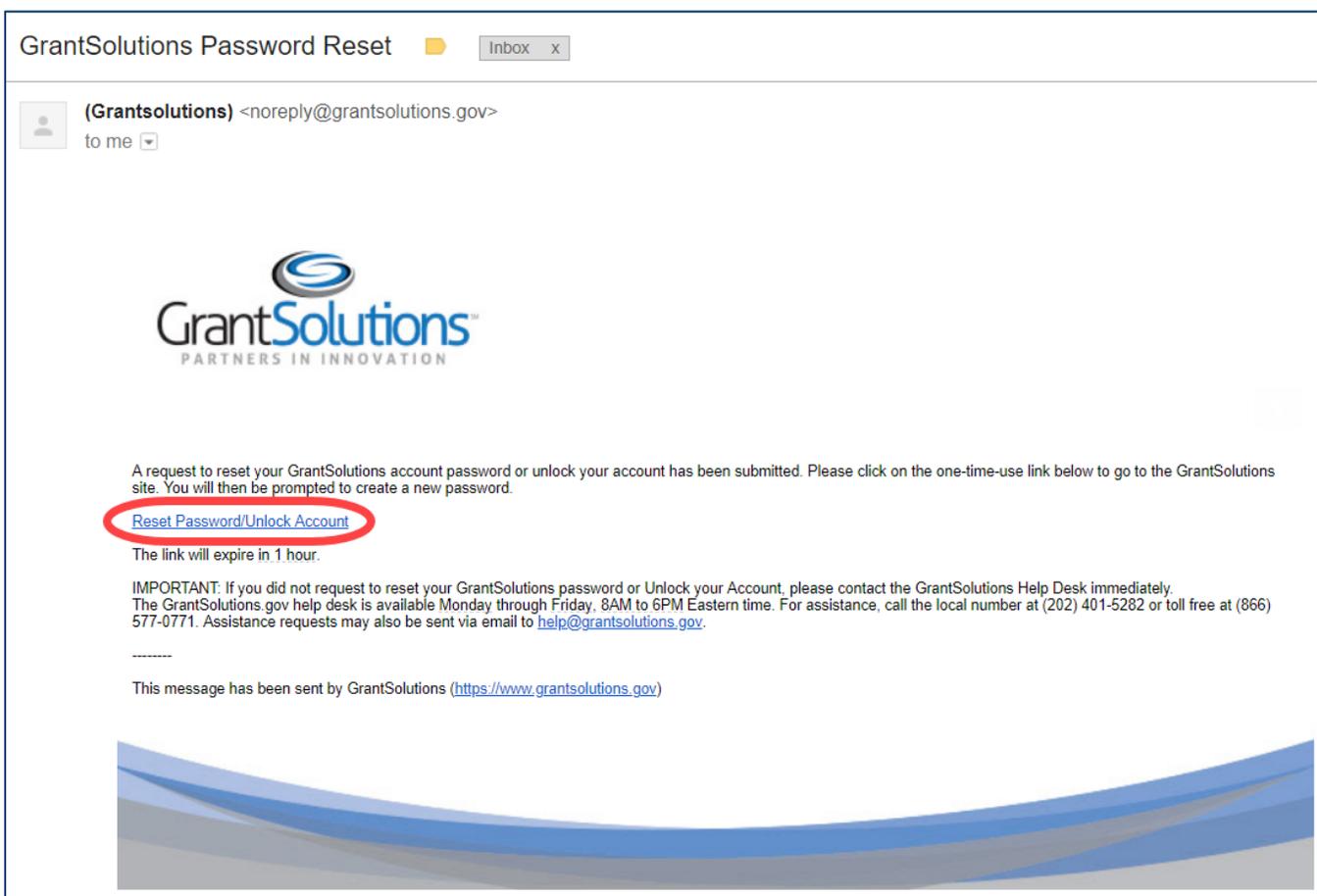


Figure 18: Password reset email message

6. The “Reset Password” screen appears. Enter a **new password**, and then **re-enter the new password**.
7. Click the **Reset Password** button.

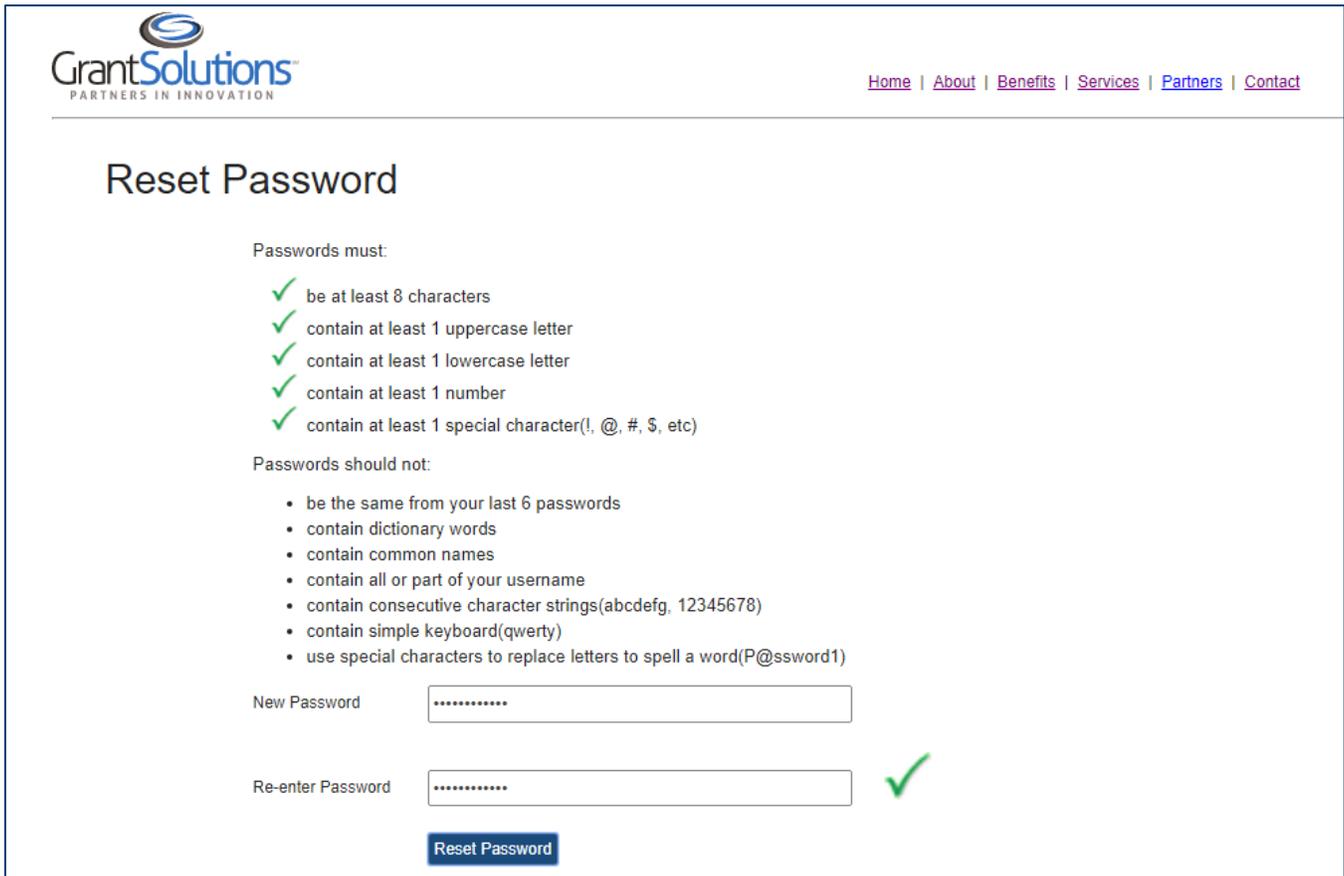


Figure 19: Reset Password screen

8. The screen refreshes and the message “Your password has been changed successfully” appears. Click the **Back to Login Screen** link.

Back to Login Screen.' A red arrow points to the 'Back to Login Screen' link." data-bbox="87 709 915 885"/>

Figure 20: Back to Login Screen link

- The “GrantSolutions Login” screen appears. Enter your **Username**, new **Password**, and click the **Login** button.

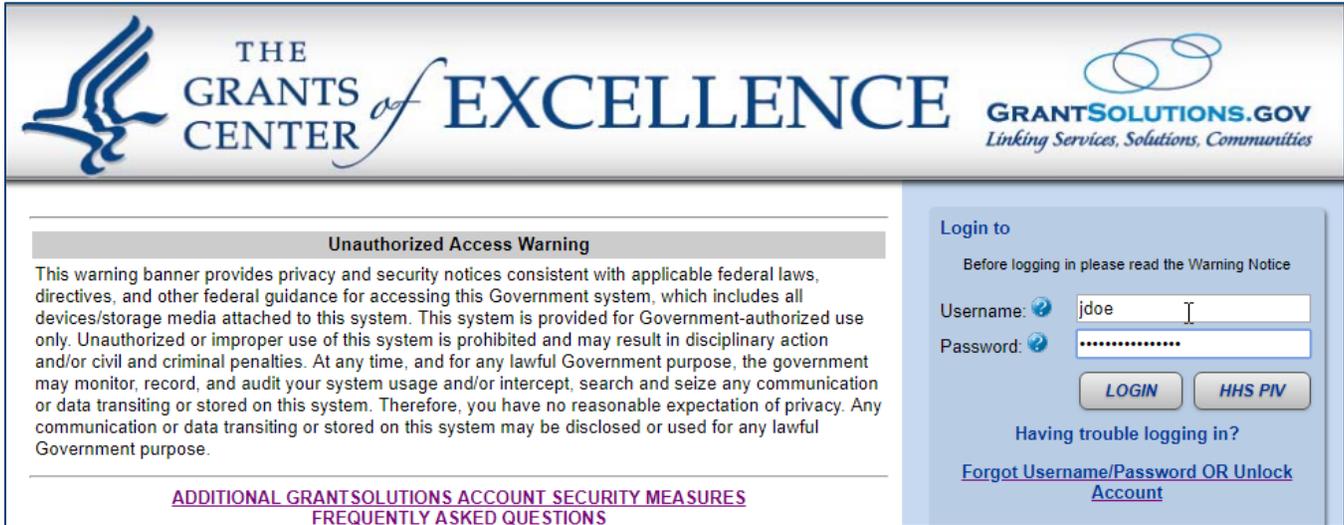


Figure 21: GrantSolutions Login screen

- The “My Grants List” screen appears.

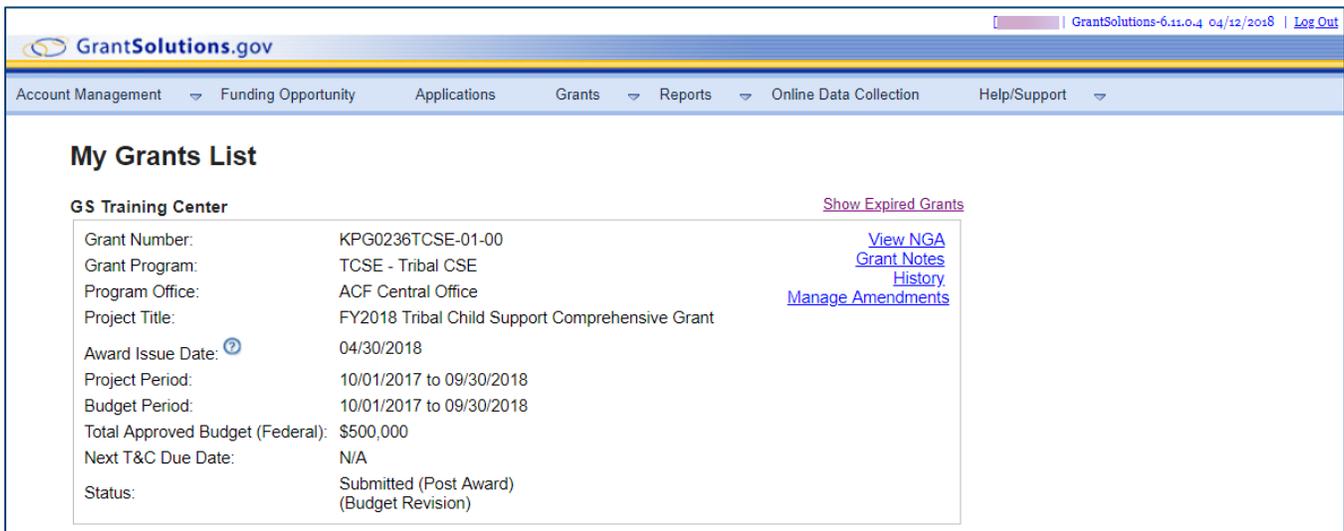


Figure 22: My Grants List screen

## Password Expiration

Passwords expire every 60 days. When the time gets close to change a password, the following red countdown message appears at the top of every screen in GrantSolutions:

**Your password will expire in xx day(s). [Please Change Now](#)**

1. Click the link **Please Change Now** to set a new password.



Figure 23: Password expiration prompt from within GrantSolutions

2. The “Change Password” screen appears. Enter the **Current Password**, **New Password**, and **Confirm New Password**. Click the **Submit** button.

### Change Password

**\* indicates a required field.**

#### GrantSolutions Password Policy

Passwords must:

- ✓ be at least 8 characters
- ✓ contain at least 1 uppercase letter
- ✓ contain at least 1 lowercase letter
- ✓ contain at least 1 number
- ✓ contain at least 1 special character(!, @, #, \$, etc)

Passwords should not:

- be the same from your last 6 passwords
- contain dictionary words
- contain common names
- contain all or part of your username
- contain consecutive character strings(abcdefg, 12345678)
- contain simple keyboard(qwerty)
- use special characters to replace letters to spell a word(P@ssword1)

Current Password *	<input type="password"/>
New Password *	<input type="password"/>
Confirm New Password *	<input type="password"/>

✓

Figure 24: Change Password screen

3. The “Confirmation of New Password” screen displays. Click the **Re-Login** button.

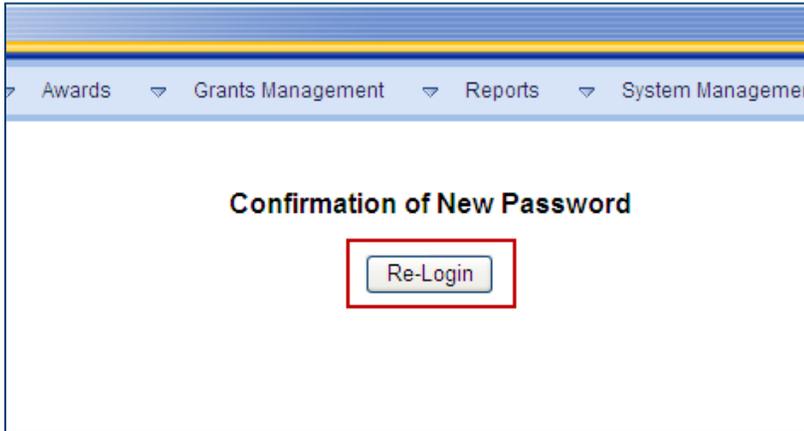


Figure 25: Confirmation of New Password screen

4. The GrantSolutions “Login” screen appears. Login using the newly reset password.
5. The “My Grants List” screen displays.



Figure 26: My Grants List screen

## Navigation

After logging into the GrantSolutions GMM, the first screen that appears is “My Grants List”. This page contains all active awards assigned to the Grantee organization.

Each screen in the GrantSolutions GMM contains the menu bar, the footer, and quick links to the user’s profile and Log Out.

### MENU BAR

The GrantSolutions GMM menu bar is located towards the top of each screen. Use the mouse or keyboard to expand each menu item.

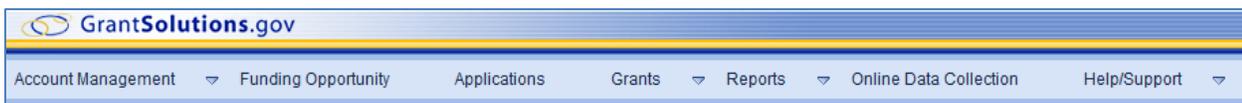


Figure 27: Menu Bar

### Account Management

The *Account Management* menu contains four sub-menus. They are as follows:

- **Update Profile:** Update personal phone numbers, address information, and turn two-factor authentication on or off
- **Change Password:** Change current password
- **User Roles:** View assigned GrantSolutions authorities
- **Notification Preferences:** Modify automatic notifications sent from GrantSolutions
- **CCR Validation:** View your organization’s Central Contractor Registry (SAM.gov) information

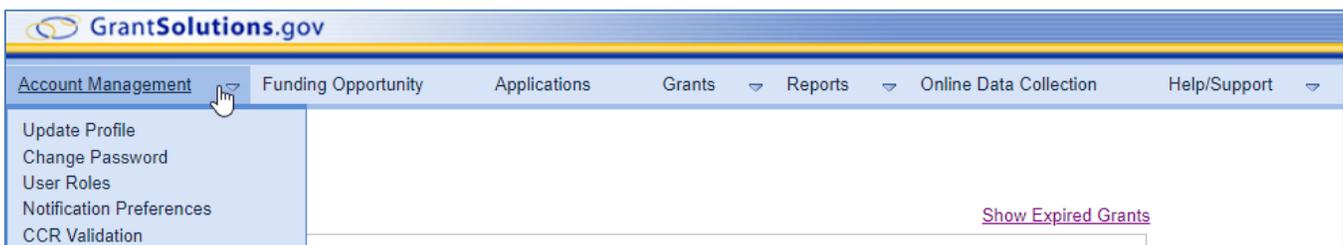


Figure 28: Account Management menu

## Funding Opportunity

From the *Funding Opportunity* menu, Grantees can view and apply for available funding opportunities, including Non-Competing Continuations, Directed Supplements, Directed Announcements, and Competitive Announcements that may be applied for through the GrantSolutions GMM.



Figure 29: Funding Opportunity Menu

## Applications

From the *Applications* menu, access the list of all started and submitted applications, except for Amendment applications.

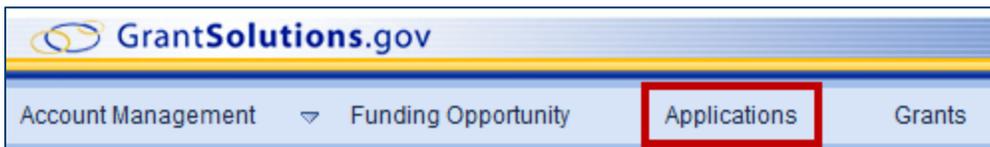


Figure 30: Applications Menu

Application statuses are listed along with possible actions. The *Action* column contains the following options:

- **Open:** View a submitted/awarded application
- **Notes:** Add an Application Note to the official application record
- **Remove:** Delete an application in progress (only for applications not yet submitted)
- **Send Message:** Grantees no longer use the Send Message option

My Applications List - AWalters-grantee							
Application Number Grant Number	Title	Application Type	Fed Received Date	Project Period	Due Date	Status	Action
(To be assigned)		New	N/A	05/01/2015 - 04/30/2019	01/06/2015 03:00 PM EST	Work in Progress	<a href="#">Open</a>   <a href="#">Notes</a>   <a href="#">Remove</a>   <a href="#">Send Message</a>
1202015001429 120CMS331365	CHIPRA Connecting Kids to Coverage - AI/AN	New	11/06/2014	09/02/2014 - 09/01/2016	06/30/2014 03:00 PM EST	Awarded	<a href="#">Open</a>   <a href="#">Notes</a>   <a href="#">Send Message</a>

Return to Announcements

Figure 31: My Applications List

*Note: Amendment applications are tracked via the **Manage Amendments** screen, not the My Applications List.*

## Grants

Use the *Grants* menu to return to “My Grants List” screen, or to view/accept or decline “Pending Grants”.

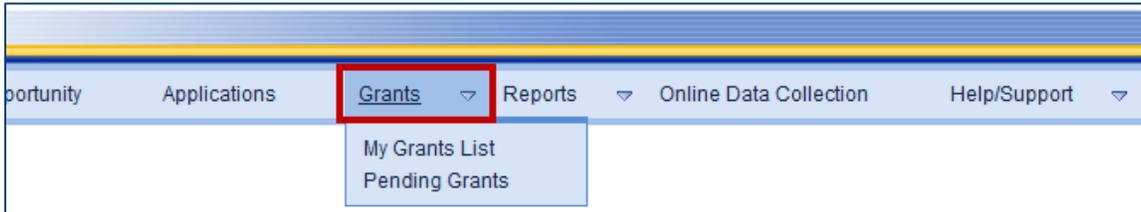


Figure 32: Grants Menu

*Note: Not all agencies require Grantees to accept pending grants via GrantSolutions. Please contact the awarding agency for direction.*

### **Pending Grants (Accept Grant)**

When a grant is awarded, some Federal agencies may require the Grantee Authorizing Official (ADO role) to log into GrantSolutions to **View** and **Accept** or **Decline** the award on behalf of their organization.

To view the pending award:

1. Log into GrantSolutions ([www.grantsolutions.gov](http://www.grantsolutions.gov))
2. The “My Grants List” screen displays. From the menu bar, select **Grants – Pending Grants**.

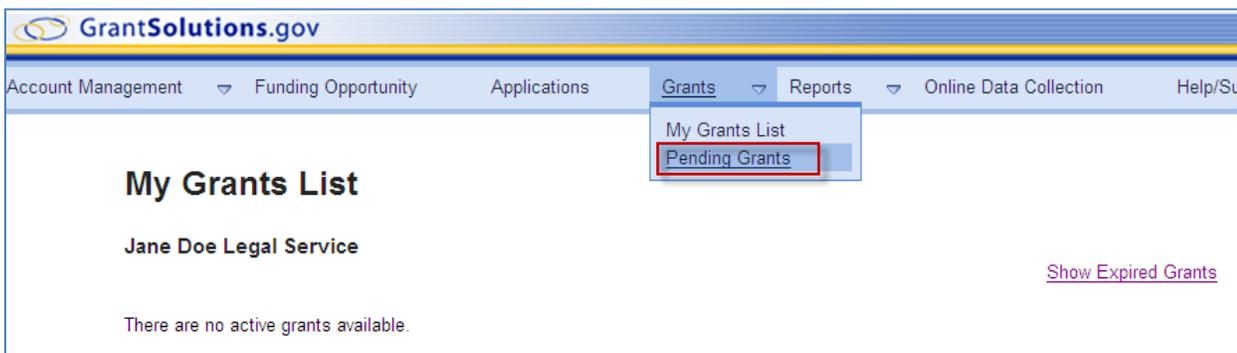
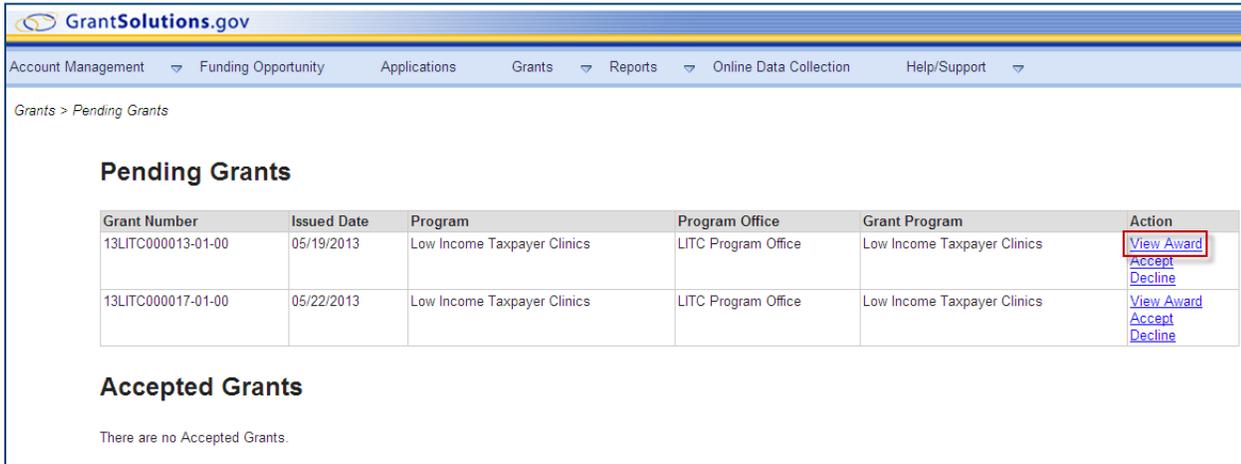


Figure 33: My Grants List screen - Grants: Pending Grants submenu

- The “Pending Grants” screen appears. All grants awaiting acceptance are available from this screen. To view the Notice of Award (NOA), from the *Action* column, click the link **View Award**.



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Account Management Funding Opportunity Applications Grants Reports Online Data Collection Help/Support

Grants > Pending Grants

### Pending Grants

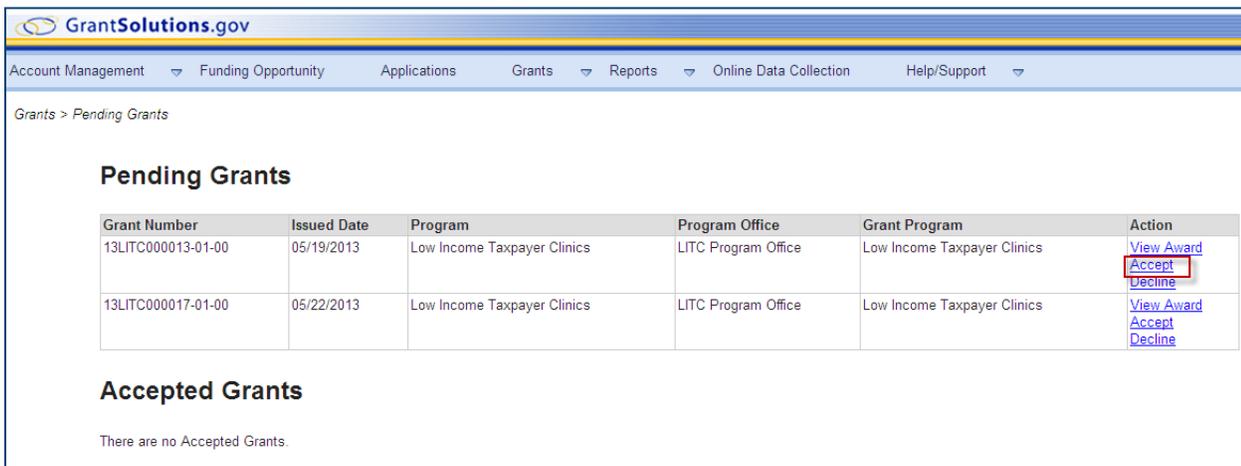
Grant Number	Issued Date	Program	Program Office	Grant Program	Action
13LITC000013-01-00	05/19/2013	Low Income Taxpayer Clinics	LITC Program Office	Low Income Taxpayer Clinics	View Award Accept Decline
13LITC000017-01-00	05/22/2013	Low Income Taxpayer Clinics	LITC Program Office	Low Income Taxpayer Clinics	View Award Accept Decline

### Accepted Grants

There are no Accepted Grants.

Figure 34: Pending Grants screen

- The NOA opens as a PDF in a new window. The PDF may be saved or printed. When done viewing the award, click the **X** in the upper right corner of the PDF to close the window and return to the “Pending Grants” screen.
- To accept the award, from the *Action* column, click the **Accept** link.



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Account Management Funding Opportunity Applications Grants Reports Online Data Collection Help/Support

Grants > Pending Grants

### Pending Grants

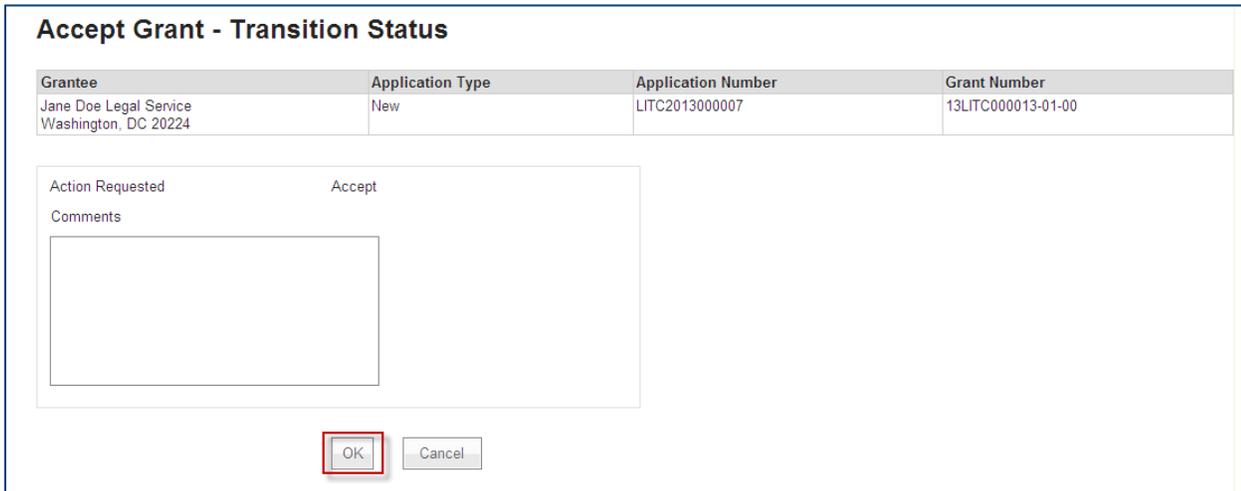
Grant Number	Issued Date	Program	Program Office	Grant Program	Action
13LITC000013-01-00	05/19/2013	Low Income Taxpayer Clinics	LITC Program Office	Low Income Taxpayer Clinics	View Award Accept Decline
13LITC000017-01-00	05/22/2013	Low Income Taxpayer Clinics	LITC Program Office	Low Income Taxpayer Clinics	View Award Accept Decline

### Accepted Grants

There are no Accepted Grants.

Figure 35: Pending Grants screen - Accept link

- The “Accept Grant – Transition Status” screen opens in a new window. Click the **OK** button.



**Accept Grant - Transition Status**

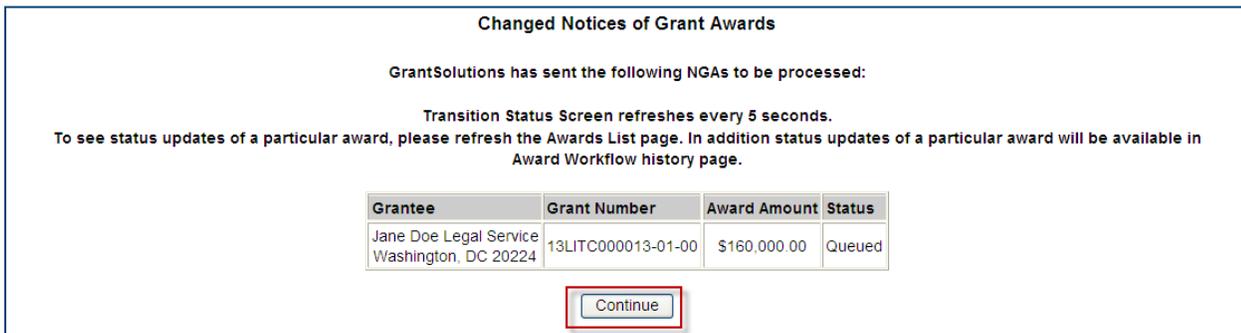
Grantee	Application Type	Application Number	Grant Number
Jane Doe Legal Service Washington, DC 20224	New	LITC2013000007	13LITC000013-01-00

Action Requested: Accept

Comments:

Figure 36: Accept Grant - Transition Status screen

- The “Changed Notices of Grant Awards” screen appears. Click the **Continue** button.



**Changed Notices of Grant Awards**

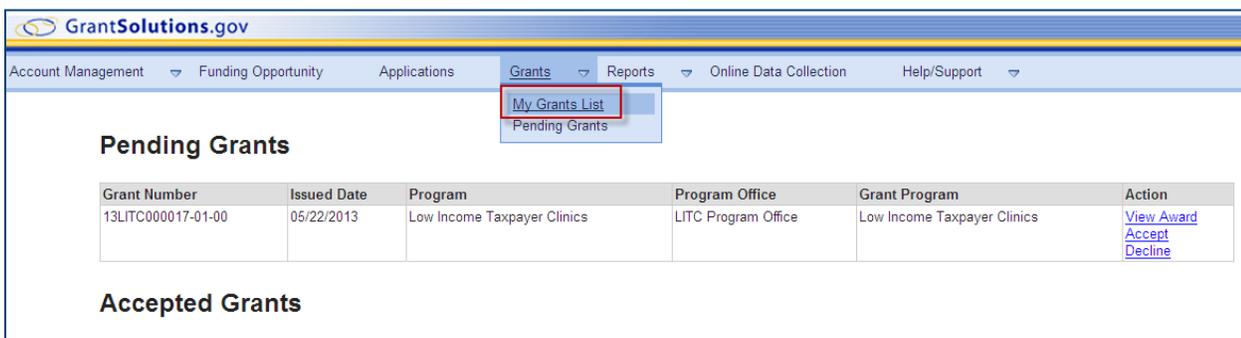
GrantSolutions has sent the following NGAs to be processed:

Transition Status Screen refreshes every 5 seconds.  
To see status updates of a particular award, please refresh the Awards List page. In addition status updates of a particular award will be available in Award Workflow history page.

Grantee	Grant Number	Award Amount	Status
Jane Doe Legal Service Washington, DC 20224	13LITC000013-01-00	\$160,000.00	Queued

Figure 37: Changed Notices of Grant Awards screen

- The “Pending Grants” screen opens, and the accepted grant is removed from the list. To return to the “My Grants List” screen, select **Grants – My Grants List** from the *menu bar*.



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**Pending Grants**

Grant Number	Issued Date	Program	Program Office	Grant Program	Action
13LITC000017-01-00	05/22/2013	Low Income Taxpayer Clinics	LITC Program Office	Low Income Taxpayer Clinics	<a href="#">View Award</a> <a href="#">Accept</a> <a href="#">Decline</a>

**Accepted Grants**

Figure 38: Pending Grants screen

9. The “My Grants List” screen appears, and the accepted grant is available.

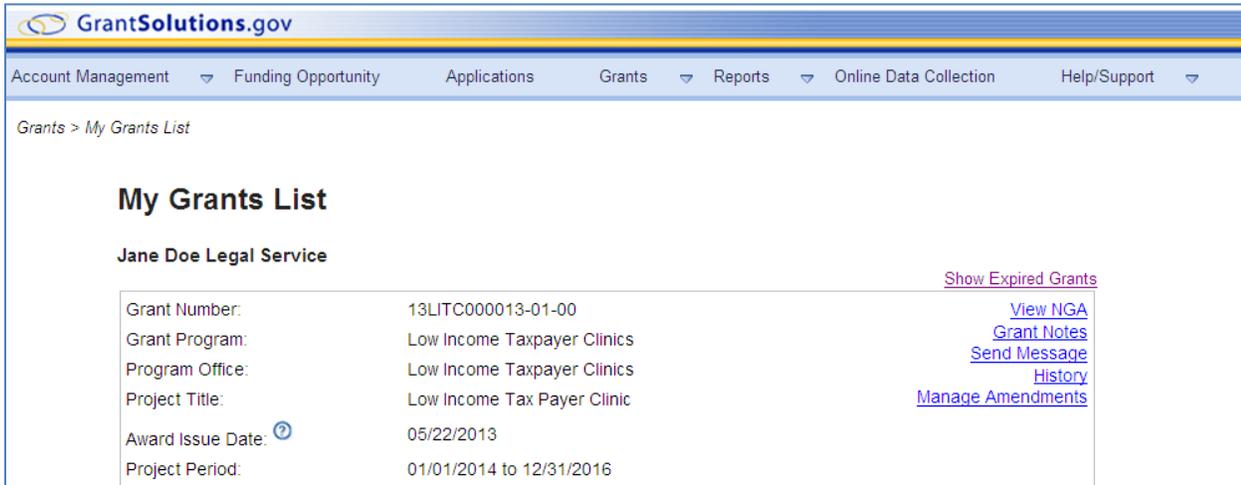


Figure 39: My Grants List screen

## Reports

The *Reports* menu provides access to the Federal Financial Reports (FFR) screen. Only access this screen if directed by the awarding agency’s Grants Office. For more in-depth information about the FFR, please refer to the guide “Grantee Reporting Process: Federal Financial Report (FFR)” and the training videos available from the Grantee Support and Reference site.

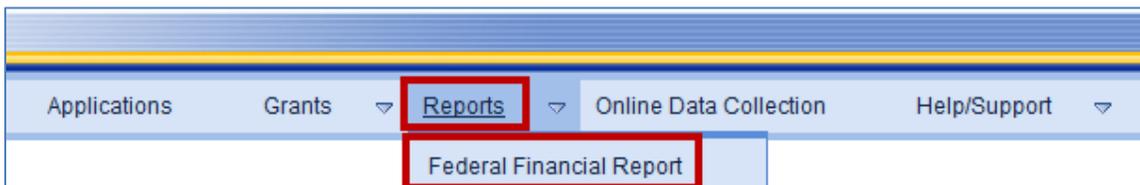


Figure 40: Reports Menu - Federal Financial Report

## Online Data Collection

The Online Data Collection menu is a link that when clicked, opens the Online Data Collection (OLDC) system. Only access this screen if directed by the awarding agency.

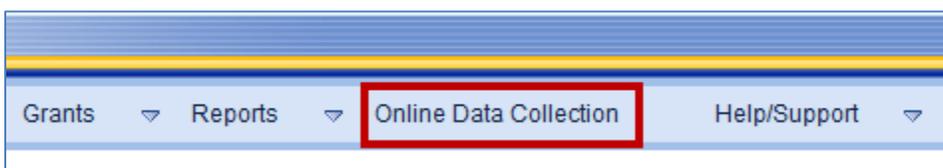


Figure 41: Online Data Collection menu

## Help/Support

Use the *Help/Support – Documentation* menu to access the “Grantee Support and Reference” site.

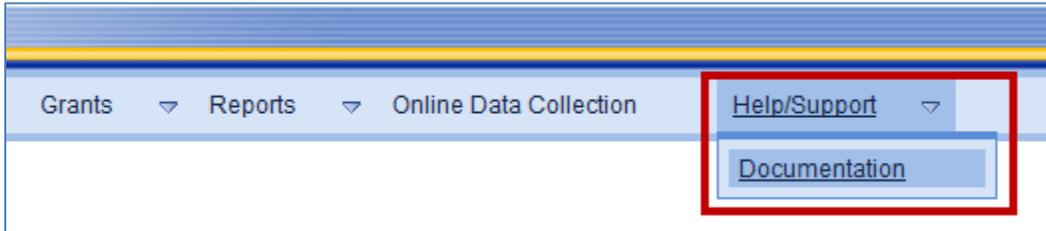


Figure 42: Help/Support – Documentation menu

The “Grantee Support and Reference” site contains Guides, Quick Sheets, Training Videos, and Grantee Registration information.



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## Grantee Support and Reference

The GrantSolutions.gov mission is to provide a comprehensive and cost effective grants management solution for grantors, grantees and applicants. We service all types of grants (service, training, demonstration, social research, and cooperative agreements) across all grant categories (discretionary, formula, block, and entitlement).

### GrantSolutions Grants Management Module Materials

#### Documentation

- [GrantSolutions Grants Management Module Grantee Guide](#)
- [Quick Sheet: Grantee Resources](#)
- [Quick Sheet: Apply for a Directed Announcement](#)
- [Quick Sheet: Accept a Grant](#)
- [Quick Sheet: Add a Grant Note](#)
- [Quick Sheet: Budget Revision Amendment](#)
- [Quick Sheet: Carryover Amendment](#)
- [Grantee Reporting Process: Federal Financial Report \(FFR\)](#)

#### Grantee Video Training Series

A number of training videos have been created to help the grantee community successfully and confidently use GrantSolutions.

[Grantee Video Training Series](#)

[Introduction to the Federal Financial Report \(FFR\) for Grantees](#)

[Modify Submitted Federal Financial Report \(FFR\) for Grantees](#)

[View the Federal Financial Report \(FFR\) for Grantees](#)

#### inForm (OI DC) Materials

Figure 43: Grantee Support and Reference site

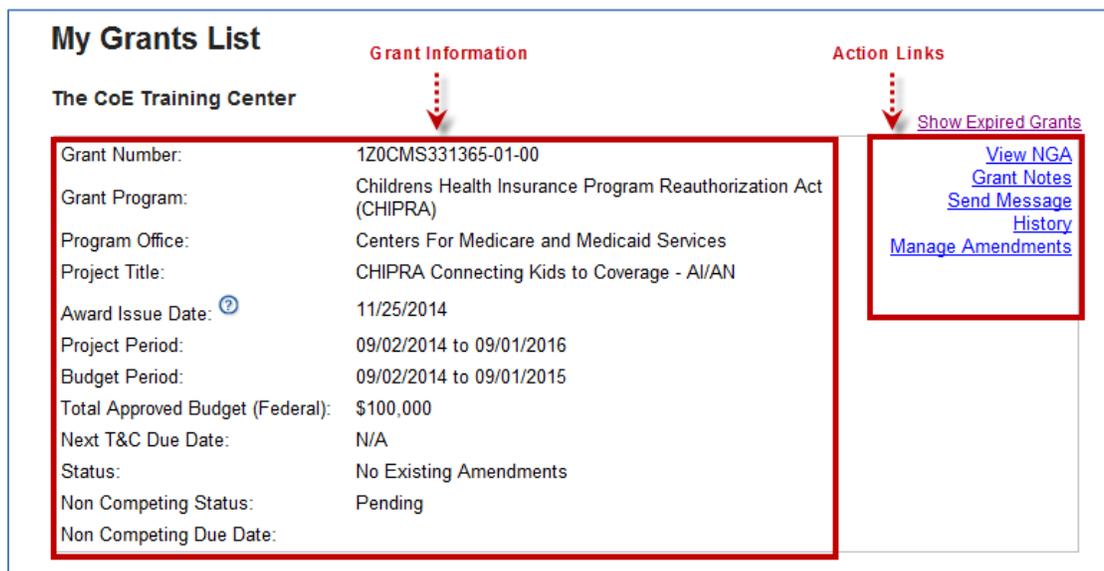
## My Grants List

“My Grants List” is the main screen for viewing and managing existing grants. Each awarded grant is listed in its own note card. “My Grants List” may contain one or more note cards depending on the number of awarded grants available. To view expired grants (grants where the project period end date is passed), click the **Show Expired Grants** link towards the top left of the first note card.

Each award contains the following read-only grant information:

- Grant Number
- Grant Program
- Program Office
- Project Title
- Award Issue Date
- Project Period dates
- Budget Period dates
- Total Approved Budget (Federal)
- Next Terms and Conditions Due Date (if applicable)
- Amendment Status (if applicable)
- Non Competing Status (if applicable)
- Non Competing Due Date (if applicable)

Each award also contains several action links. These include *View NGA*, *Grant Notes*, *History*, and *Amendments*. Other action links such as *Apply for Non Competing Continuation*, *FFR*, and *Progress Reporting* may also be visible on the screen.



**My Grants List**

The CoE Training Center

**Grant Information**

Grant Number: 1Z0CMS331365-01-00  
 Grant Program: Childrens Health Insurance Program Reauthorization Act (CHIPRA)  
 Program Office: Centers For Medicare and Medicaid Services  
 Project Title: CHIPRA Connecting Kids to Coverage - AI/AN  
 Award Issue Date: 11/25/2014  
 Project Period: 09/02/2014 to 09/01/2016  
 Budget Period: 09/02/2014 to 09/01/2015  
 Total Approved Budget (Federal): \$100,000  
 Next T&C Due Date: N/A  
 Status: No Existing Amendments  
 Non Competing Status: Pending  
 Non Competing Due Date:

**Action Links**

Show Expired Grants  
[View NGA](#)  
[Grant Notes](#)  
[Send Message](#)  
[History](#)  
[Manage Amendments](#)

Figure 44: My Grants List screen

## VIEW NGA

Click the **View NGA** link to open the most recent issued Notice of Award as a PDF in a new window. To close the award, click the **X** in the upper left corner of the PDF window.

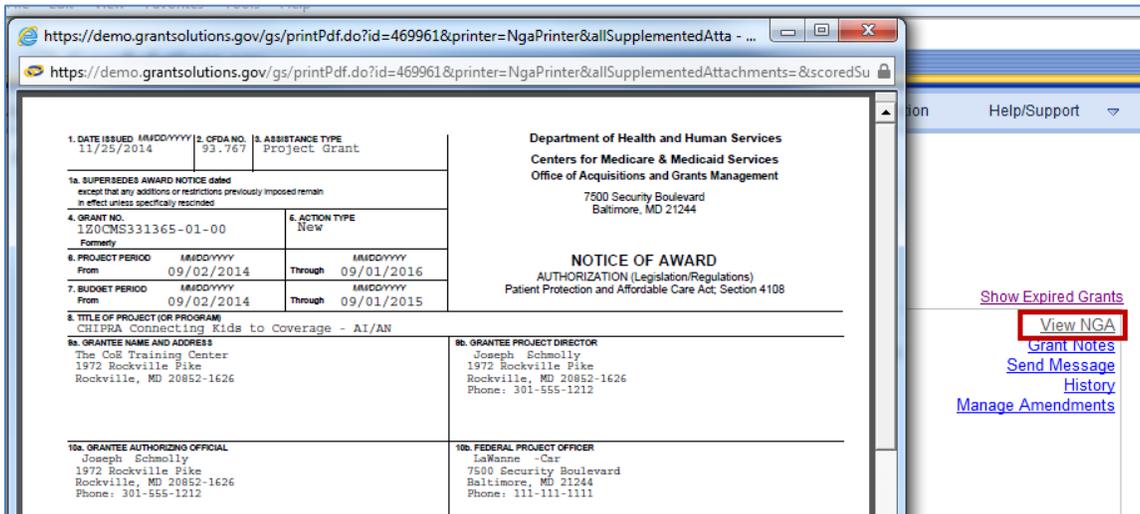


Figure 45: View NGA link and Notice of Award PDF

## GRANT NOTES

Grant Notes are used to add correspondence comments and to attach necessary documents to a grant record in the GrantSolutions GMM. Notes are saved with the grant record for historical and tracking purposes.

To view or add a Grant Note:

1. Log into GrantSolutions ([www.grantsolutions.gov](http://www.grantsolutions.gov)).
2. The “My Grants List” screen appears. Locate the desired grant and click the **Grant Notes** link.

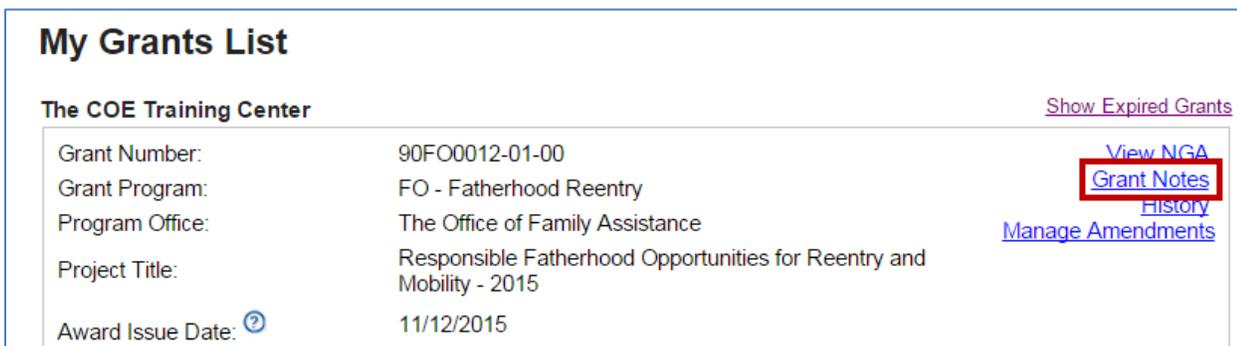


Figure 46: My Grants List - Grant Notes link

3. The “Grant Notes” screen appears in a new window.

The top portion of the screen contains the Grant information.

The middle section contains search fields that may be used to locate specific Grant Notes. The search fields are populated from the previously added notes. The search fields are:

- **Grant Note Create Date:** “From” and “To” dates
- **Grant Note Type:** Correspondence
- **Grant Note Category:** Pre-defined categories
- **Author:** Name of user that created the Grant Note
- **Subject:** Grant Note subject

### Grant Notes

---

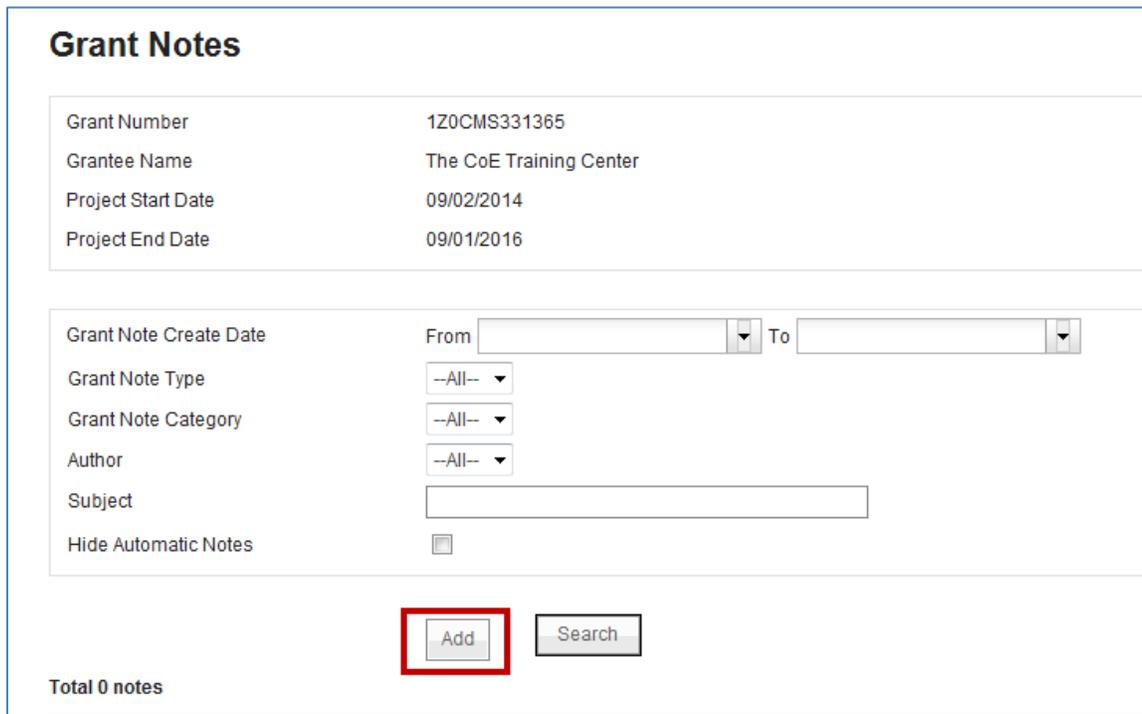
Grant Number	Grant Information	90FO0012
Grantee Name		The COE Training Center
Project Start Date		10/30/2015
Project End Date		10/29/2020

---

Grant Note Create Date	From	<input type="text"/>	To	<input type="text"/>	
Grant Note Type		<input type="text" value="--All--"/>			
Grant Note Category		<input type="text" value="--All--"/>			Search for Notes
Author		<input type="text" value="--All--"/>			
Subject		<input type="text"/>			
Hide Automatic Notes		<input checked="" type="checkbox"/>			

Figure 47: Grant Notes screen

4. To add a new note, scroll towards the bottom of the window and click the **Add** button.



**Grant Notes**

Grant Number	1Z0CMS331365
Grantee Name	The CoE Training Center
Project Start Date	09/02/2014
Project End Date	09/01/2016

Grant Note Create Date	From	<input type="text"/>	To	<input type="text"/>
Grant Note Type	--All--			
Grant Note Category	--All--			
Author	--All--			
Subject	<input type="text"/>			
Hide Automatic Notes	<input type="checkbox"/>			

Total 0 notes

Figure 48: Grant Notes screen - Add button

5. The “Grant Note-Add” screen displays. Enter information in the required fields (indicated by a red asterisks).

- **Subject:** Enter the subject of the note. Conform to naming conventions provided by the Grantor
- **Note Type:** Correspondence is the only option and is automatically selected
- **Category Type:** Select from the pre-set list of categories
- **Notes:** Enter the note text (limit of 2000 characters)
- **Note Attachments (Optional):** Attach one or more files by entering a file description and uploading desired attachments

- When done, click the **Submit** button.

### Grant Notes - Add

Author: Anna-Lisa Walters-grantee

Subject \*:

Note Type \* ?:  Correspondence

Category Type \*:

Notes \* ?  
(Limit to 2000 characters): 

Please see attachment

*Note Attachments*

Author: Anna-Lisa Walters-grantee

Description:

File to Upload:  No file chosen

Description	Source Attachments	Status	Actions
Training Note	Budget.docx	SUCCESSFUL	

\* Status updates every 10 seconds

Figure 49: Grant Notes - Add screen

- The “Grant Notes” screen reappears. Once a note is submitted, it is available for viewing in the GrantSolutions GMM.
- Additionally, an automatically generated email notification is sent to the assigned Principal Investigator/Program Director and Grantee Authorizing Official alerting them that the Grant Note is added. However, the note is not contained in the body of the email. The user must log into the GrantSolutions GMM to view the Grant Note.

- Only the author of the note can Edit or Delete the note. All other users with access to the grant have view-only access

Total 1 notes

Subject	Category	Grant Note Type	Author	Date	Support Year	Application Number	Bulk Notes	Action
Training Note	Other	Correspondence	Anna-Lisa Walters-grantee	11/13/2015 09:26 (GMT -04:56) EST	1	FO2015000369 90FO0012	No	Edit Note Delete Note View Note

Figure 50: Grant Notes table - Action column

- Click the **Cancel** button to close the window and return to the “My Grants List” screen.

Total 1 notes

Subject	Category	Grant Note Type	Author	Date	Support Year	Application Number	Bulk Notes	Action
Training Note	Other	Correspondence	Anna-Lisa Walters-grantee	11/13/2015 09:26 (GMT -04:56) EST	1	FO2015000369 90FO0012	No	

Figure 51: Grant Notes table - Cancel button

## HISTORY

To view the entire history of the awarded grant, including all submitted and awarded applications, click the **History** link.

**Grant History**

Grantee Name: The CoE Training Center  
 Project Title: CHIPRA Connecting Kids to Coverage - AI/AN  
 Project Period: 09/02/2014 to 09/01/2016  
 Budget Year: 1

Application Number	Grant Number	Action Date	Project Period	Budget Period	Award Amount	Application Type	Status	Action
<a href="#">1Z02015001429</a>	1Z0CMS331365-01-00	11/25/2014	09/02/2014 to 09/01/2016	09/02/2014 to 09/01/2015		New	Awarded	<a href="#">View Application</a> <a href="#">View NGA</a>

**My Grants List**

The CoE Training Center

Grant Number: 1Z0CMS331365-01-00  
 Grant Program: Childrens Health Insurance Program Reauthorization Act (CHIPRA)  
 Program Office: Centers For Medicare and Medicaid Services  
 Project Title: CHIPRA Connecting Kids to Coverage - AI/AN  
 Award Issue Date: 11/25/2014

[Show Expired Grants](#)  
[View NGA](#)  
[Grant Notes](#)  
[Send Message](#)  
[History](#)  
[Manage Amendments](#)

Figure 52: History link and Grant History screen

## Manage Amendments

An amendment is a post-award change to a grant. Grantees may initiate certain types of amendments in the GrantSolutions GMM from the “My Grants List” screen. Amendment types may include, but are not limited to supplements, change in staff, budget revisions, carryover requests, change in Grantee address, and more.

*Note: Contact the awarding agency for the types of amendments that can be created by a grant recipient.*

To view amendments in progress or to initiate a new amendment, follow the below steps:

1. From the “My Grants List” screen, click the link **Manage Amendments**.

### My Grants List

**The CoE Training Center**

[Show Expired Grants](#)

Grant Number:	1Z0CMS331365-01-00	<a href="#">View NGA</a> <a href="#">Grant Notes</a> <a href="#">Send Message</a> <a href="#">History</a>
Grant Program:	Childrens Health Insurance Program Reauthorization Act (CHIPRA)	<b>Manage Amendments</b>
Program Office:	Centers For Medicare and Medicaid Services	
Project Title:	CHIPRA Connecting Kids to Coverage - AI/AN	
Award Issue Date: <span style="font-size: small;">?</span>	11/25/2014	
Project Period:	09/02/2014 to 09/01/2016	

Figure 53: Manage Amendments link

*Note: If more than one grant is available from the My Grants List screen, scroll through the page until the desired grant is located.*

- The “Manage Amendments” screen appears. All amendments are initiated and tracked from this screen. To begin a new amendment action, click the **New** button.

**Manage Amendments**

Grant Number	1Z0CMS331365
Grantee Name	The CoE Training Center
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN
Project Start Date	09/02/2014
Project End Date	09/01/2016
Last Issued NGA	11/25/2014 <a href="#">(View NGA)</a>

Amendment #	Status	Submitted Date	Type	Budget Period	Action
(There are no Amendments found for this Grant.)					

Figure 54: Manage Amendments screen - New button

- The “Select Amendment Type” screen appears. Click the radio button to the left of the desired amendment type, and then click the **Create Amendment** button.

**Important!** The amendment types available to Grantees vary by the awarding agency. As a result, the amendment types on your screen may not match the image below.

**Select Amendment Type**

Grant Number	1Z0CMS331365-1
Project Period	09/02/2014 to 09/01/2016
Budget Period	09/02/2014 to 09/01/2015
Amendment Type	<input type="radio"/> Extension with Funds (Type 4) <input type="radio"/> Extension without Funds (Type 4) <input checked="" type="radio"/> <b>Revision (Budget) (Type 6)</b> <input type="radio"/> Revision (Carryover) (Type 6) <input type="radio"/> Revision (Change in Scope) (Type 3) <input type="radio"/> Revision (Change of Address) (Type 6) <input type="radio"/> Revision (Change of PI/PO) (Type 6) <input type="radio"/> Revision (EIN) (Type 6) <input type="radio"/> Revision (NoA Other) (Type 6) <input type="radio"/> Supplement (Administrative) (Type 3) <input type="radio"/> Supplement (Programmatic) (Type 3)

Figure 55: Select Amendment Type screen

4. The “GrantSolutions Amendment Application Control Checklist” screen appears. The checklist screen contains the following information:
  - **Amendment Type:** The type selected from the “Select Amendment Type” screen
  - **Status:** The stage of the Amendment application. Statuses include Work in Progress and Submitted
  - **Print Application - Original Submission:** Click the *Original Submission* link to view, print, or save a PDF of the entire application package (completed forms, attachments, etc.)
  - **Applicant, grant, and project information:** Read-only information about the award
  - **Application Kit:** The application package that includes online forms, enclosures, attachments, and form status
  - **Verify Submission:** Submit application
  - **Close:** Return to the Manage Amendment screen

### GrantSolutions Amendment Application Control Checklist

**Post Award Action: Revision (Budget)**

**Work In Progress (Post Award)**

This is your GrantSolutions Application Control Checklist (EACC). You will use the EACC to track the status of your application.

To complete your application electronically, enter information by using the online forms and/or adding attachments (upload/mail-in). Required items are noted by the exclamation point image. If an enclosure has not been verified, a red 'X' image is displayed.

**Print Application:**

[Original Submission](#)

Applicant	The CoE Training Center
Grant Number	1ZOCMS331365
Application Number	(To be assigned)
Action	Revision (Budget)
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN

Online Forms	Enclosure(s)	Attachment(s)	Status
SF-424 Application for Federal Assistance Version 2	<a href="#">Enter Online</a> <a href="#">Enter Comments</a>	N/A	└─
SF-424A Budget Information - Non-Construction	<a href="#">Enter Online</a> <a href="#">Enter Comments</a>	N/A	⚠
Information for the Applicant	Enclosure(s)	Attachment(s)	Status
CMS Amendment Types & Guidance for Submission	<a href="#">View PDF</a> <a href="#">View Original Version</a>	N/A	└─
Program Narrative	Enclosure(s)	Attachment(s)	Status
Budget Narrative		0 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	⚠
Additional Information to be Submitted	Enclosure(s)	Attachment(s)	Status
Cover Letter		0 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	└─

**Amendment Package Status:** Work In Progress (Post Award)

Figure 56: GrantSolutions Application Control Checklist screen

- Once an amendment is created, the status is *Work in Progress*. If an amendment type is selected in error, click the **Close** button from the bottom of the screen to return to the “Manage Amendments” screen.

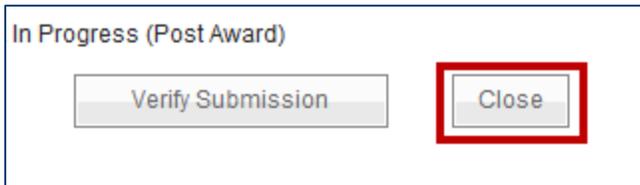


Figure 57: Close button

Optional: The “Manage Amendment” screen appears. Click the Delete Amendment link from the Action column to remove the amendment action.

*Note: The Delete Amendment link is only active when the status is Work in Progress.*

- From the “Manage Amendments” screen, click the **Edit Amendment** link to continue working on the amendment action.

Manage Amendments					
Grant Number	120CMS331365				
Grantee Name	The CoE Training Center				
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN				
Project Start Date	09/02/2014				
Project End Date	09/01/2016				
Last Issued NGA	11/25/2014 <a href="#">(View NGA)</a>				
Amendment #	Status	Submitted Date	Type	Budget Period	Action
(To be assigned) 	Work In Progress (Post Award)		Revision (Budget)	1 09/02/2014 - 09/01/2015	<a href="#">Edit Amendment</a> <a href="#">Delete Amendment</a> <a href="#">Grant Notes</a> <a href="#">History</a> <a href="#">Send Message</a> <a href="#">Set Budget Period</a>

Figure 58: Manage Amendments screen - Edit Amendment and Delete Amendments links

- The “GrantSolutions Amendment Application Control Checklist” screen appears. Scroll to the application kit (application package) section and enter the online forms. The forms in the kit vary depending on the Amendment type.

- To electronically complete a form in the GrantSolutions GMM, click the **Enter Online** link for the desired form (i.e. SF-424A).

Online Forms	Enclosure(s)	Attachment(s)	Status
SF-424 Application for Federal Assistance Version 2	<a href="#">Enter Online</a> <a href="#">Enter Comments</a>	N/A	⌵
SF-424A Budget Information - Non-Construction	<a href="#">Enter Online</a> <a href="#">Enter Comments</a>	N/A	⚠
Information for the Applicant	Enclosure(s)	Attachment(s)	Status
CMS Amendment Types & Guidance for Submission	<a href="#">View PDF</a> <a href="#">View Original Version</a>	N/A	⌵
Program Narrative	Enclosure(s)	Attachment(s)	Status
Budget Narrative		0 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	⚠
Additional Information to be Submitted	Enclosure(s)	Attachment(s)	Status
Cover Letter		0 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	⌵

Figure 59: Application Control Checklist - Application Kit (Package) section

Note: Forms vary depending on the Amendment type.

- The online form opens. Enter all data. When entering dollar amounts, do not use the dollar sign (\$) or commas.

OMB Number 4040-0006  
Expiration Date 06/30/2014

### SF-424A

BUDGET INFORMATION - NON CONSTRUCTION PROGRAMS

\* indicates a required field.

<b>Organization Name</b> The CoE Training Center	<b>Project Title</b> CHIPRA Connecting Kids to Coverage - AI/AN	<b>Budget Period</b> Start Date * 09/02/2014 <input type="text"/>
<b>Application Number</b> (To be assigned)	<b>Project Period</b> 09/02/2014 to 09/01/2016	End Date * 09/01/2015 <input type="text"/>

[424A Instructions](#)

Grant Program Function or Activity (a)	Catalog of Federal Domestic Assistance Number (b)	Estimated Unobligated Funds		New or Revised Budget		Total (g)
		Federal (c)	Non Federal (d)	Federal (e)	Non Federal (f)	
1. <input type="text" value="Childrens Health Insurance Program"/>	<input type="text" value="93.767 - Children's Health In"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="100000.00"/>	\$ <input type="text" value="0.00"/>	\$100,000.00
2. <input type="text" value="Childrens Health Insurance"/>	<input type="text" value="Please select a CFDA"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$0.00

Figure 60: SF-424A Online Form

10. When done, scroll to the bottom of the screen and click the **Save** button.

The screenshot shows a form with three input fields: "21. Direct Charges", "22. Indirect Charges", and "23. Remarks". Each field has a small arrow icon on its right side. At the bottom right of the form, there are two buttons: "Save" and "Close". The "Save" button is highlighted with a red rectangular box.

Figure 61: SF-424A - Save button

11. (SF-424A only) – The “Would you like to transfer your budget totals information to the SF-424 form” message appears. Click **Yes**.

The screenshot shows a "Confirmation" dialog box. The text inside the dialog reads: "Would you like to transfer your budget totals information to the SF-424 form?". Below the text are two buttons: "Yes" and "No". The "Yes" button is highlighted with a red rectangular box. In the background, a value of "\$0.00" is visible.

Figure 62: Would you like to transfer your budget totals information to the SF-424 form message

12. If there are no errors, the *Save Successful* message appears at the bottom of the screen.

*Note: If there are problems, an error icon (red circle with white exclamation point)  appears next to the cells that need corrections. To view the error text, point to the error icon with the mouse. Make change and then click the Save button again.*

13. Click the **Close** button.

The screenshot shows a green banner at the bottom of the screen with a checkmark icon and the text "Save Successful". Above the banner, at the bottom right of the form area, are two buttons: "Save" and "Close". The "Close" button is highlighted with a red rectangular box.

Figure 63: Close button

14. The “GrantSolutions Amendment Application Control Checklist” screen opens. A *Print Completed* link appears below the *Enter Online* link for the form that was just saved. The *Print Completed* link allows the user to open or save that form as a PDF. Additionally, the status column contains a green checkmark, indicating the form was successfully saved.

Online Forms	Enclosure(s)	Attachment(s)	Status
SF-424 Application for Federal Assistance Version 2	<a href="#">Enter Online</a> <a href="#">Enter Comments</a>	N/A	⏏
SF-424A Budget Information - Non-Construction	<a href="#">Enter Online</a> <a href="#">Print Completed</a> <a href="#">Enter Comments</a>	N/A	✓
Information for the Applicant	Enclosure(s)	Attachment(s)	Status
CMS Amendment Types & Guidance for Submission	<a href="#">View PDF</a> <a href="#">View Original Version</a>	N/A	⏏
Program Narrative	Enclosure(s)	Attachment(s)	Status
Budget Narrative		<a href="#">0 Uploaded Files</a>	⚠

Figure 64: Application Kit

### Status Icons

Status Icon	Description
✓	In progress or completed. Unless otherwise directed, each item in the kit should have a green check mark before submitting the Amendment. Please note that a green check mark does not mean the information is correct, just that data is entered or attached.
⚠	It is recommended that you complete this item.
⏏	Not started (optional).
✗	The enclosure is not validated (Incomplete).

15. Complete additional forms and attach any necessary files. To attach a file, locate the desired row and click the **Uploaded Files** link from the *Attachments* column.

Online Forms	Enclosure(s)	Attachment(s)	Status
SF-424 Application for Federal Assistance Version 2	<a href="#">Enter Online</a> <a href="#">Enter Comments</a>	N/A	⏏
SF-424A Budget Information - Non-Construction	<a href="#">Enter Online</a> <a href="#">Print Completed</a> <a href="#">Enter Comments</a>	N/A	✓
Information for the Applicant	Enclosure(s)	Attachment(s)	Status
CMS Amendment Types & Guidance for Submission	<a href="#">View PDF</a> <a href="#">View Original Version</a>	N/A	⏏
Program Narrative	Enclosure(s)	Attachment(s)	Status
Budget Narrative		<a href="#">Uploaded Files</a> <a href="#">0 Mail-In Items</a>	⚠

Figure 65: Attachments column - Uploaded Files link

16. The “Attachments” screen appears. Click the **Upload Attachment** button.

### Attachments

You may upload file attachments or specify mail-in items for the enclosure below:

Organization Name: The CoE Training Center  
 Application Number: (To be assigned)  
 Project Title: CHIPRA Connecting Kids to Coverage - AI/AN  
 Project Period: 09/02/2014 to 09/01/2016

Enclosure: Budget Narrative  
 Number of Attachments: 0

Item Description	Type	Review	Action
(Empty)			

Figure 66: Attachments screen

17. The “Attachment – Upload” screen appears in a new window. Enter a file description in the **Description** field, **choose a file** to attach, and click the **Attach** button.

### Attachment - Upload

Organization Name: The CoE Training Center  
 Application Number: (To be assigned)  
 Project Title: CHIPRA Connecting Kids to Coverage - AI/AN  
 Project Period: 09/02/2014 to 09/01/2016

\*Description:

\*Step 1:  No file chosen

Step 2: Press the attach button to have GrantSolutions upload the file. Please allow sufficient time for the file upload to complete. This will vary based upon your connection speed and the size of your file. If the file is successfully uploaded, you will be returned to the attachment list.

Figure 67: Attachment - Upload window

18. The “Attachments” screen appears, and the attachment is visible. Click the **Close** button.

### Attachments

You may upload file attachments or specify mail-in items for the enclosure below:

Organization Name: The CoE Training Center  
 Application Number: (To be assigned)  
 Project Title: CHIPRA Connecting Kids to Coverage - AI/AN  
 Project Period: 09/02/2014 to 09/01/2016

Enclosure: Budget Narrative  
 Number of Attachments: 1

Item Description	Type	Review	Action
Budget Narrative	Upload	Pending	<a href="#">Remove</a>

Figure 68: Attachments screen

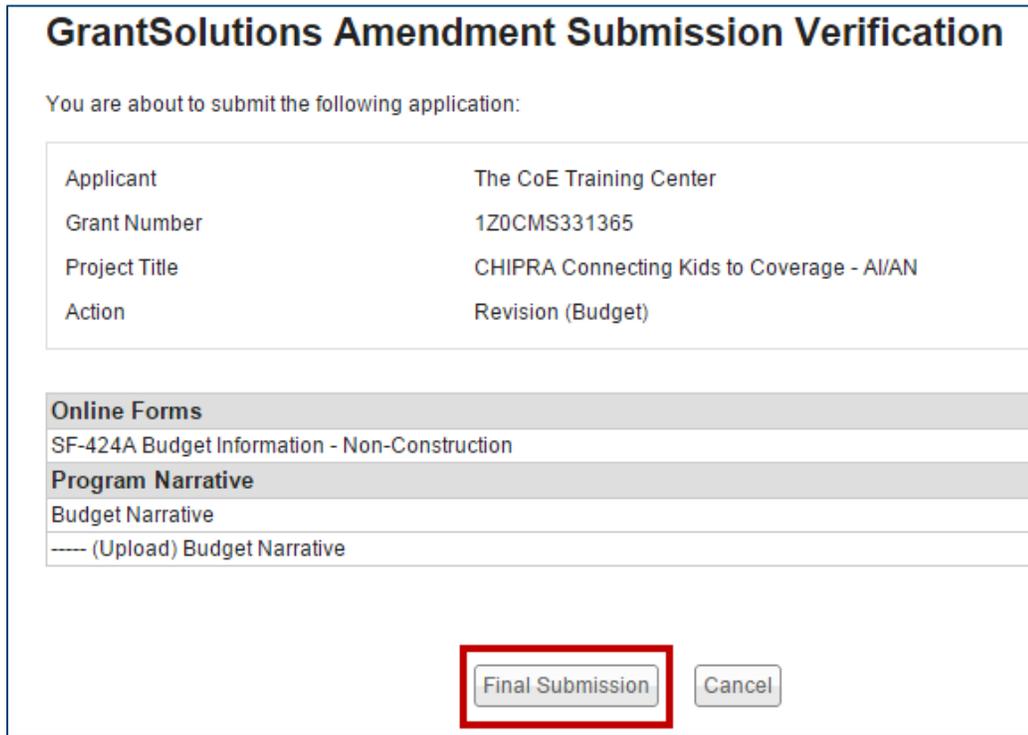
19. The “GrantSolutions Amendment Application Control Checklist” screen appears. Once all necessary forms are completed, attachments are uploaded, and there are one or more check marks in the *Status* column, click the **Verify Submission** button.

SF-424A Budget Information - Non-Construction	<a href="#">Enter Online</a> <a href="#">Print Completed</a> <a href="#">Enter Comments</a>	N/A	✓
<b>Information for the Applicant</b>	<b>Enclosure(s)</b>	<b>Attachment(s)</b>	<b>Status</b>
CMS Amendment Types & Guidance for Submission	<a href="#">View PDF</a> <a href="#">View Original Version</a>	N/A	—
<b>Program Narrative</b>	<b>Enclosure(s)</b>	<b>Attachment(s)</b>	<b>Status</b>
Budget Narrative		1 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	✓
<b>Additional Information to be Submitted</b>	<b>Enclosure(s)</b>	<b>Attachment(s)</b>	<b>Status</b>
Cover Letter		0 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	—

Amendment Package Status: Work In Progress (Post Award)

Figure 69: Verify Submission button

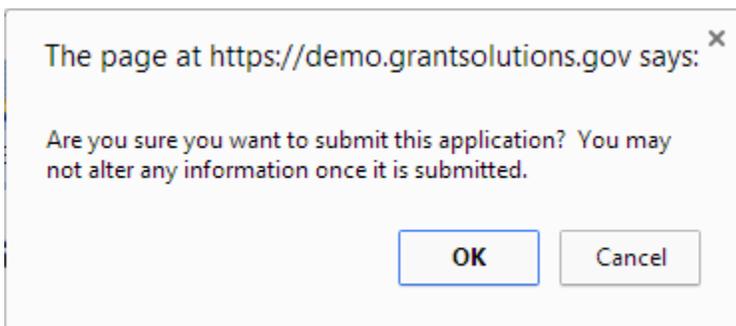
20. The “GrantSolutions Amendment Submission Verification” screen appears. Review the page to ensure all online forms are listed. Click **Final Submission**.



GrantSolutions Amendment Submission Verification	
You are about to submit the following application:	
Applicant	The CoE Training Center
Grant Number	1Z0CMS331365
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN
Action	Revision (Budget)
<b>Online Forms</b>	
SF-424A Budget Information - Non-Construction	
<b>Program Narrative</b>	
Budget Narrative	
----- (Upload) Budget Narrative	
<input type="button" value="Final Submission"/> <input type="button" value="Cancel"/>	

Figure 70: GrantSolutions Amendment Submission Verification screen

21. The “Are you sure you want to submit this application? You may not alter any information once it is submitted” message displays. Click Cancel to return to the previous screen or click **OK** to continue.



The page at <https://demo.grantsolutions.gov> says: ✕

Are you sure you want to submit this application? You may not alter any information once it is submitted.

Figure 71: Warning Message

22. The “Amendment Status Confirmation” screen appears, and the Grantor receives email notification that the amendment application is submitted. Click the **Application Control Checklist** button to return to the now submitted application kit.

### Amendment Status Confirmation

Grants has marked the following application as submitted:

\* Please submit signed copies of forms if you have been instructed by your program or grant office.

Office of Acquisitions and Grants Management  
7500 Security Boulevard  
Baltimore, MD 21244

Applicant	The CoE Training Center
Grant Number	120CMS331365
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN
Action	Revision (Budget)
Submitted Date	12/01/2014 09:49 AM Eastern Time

**Application Details**

Items	Item Attachments		
	Type	Date Expected	Date Received
SF-424A Budget Information - Non-Construction			
Budget Narrative			
Budget Narrative	Upload	N/A	12/01/2014

Figure 72: Amendment Status Confirmation screen

23. The “GrantSolutions Amendment Application Control Checklist” screen appears. Confirm that the status is *Submitted (Post Award)*. Click the **Close** button at the bottom of the screen to return to the Manage Amendments page.

**Amendment Package Status:** Submitted (Post Award)

**Mail-In Package Information:** Office of Acquisitions and Grants Management is

Figure 73: Checklist screen Close button

24. The “Manage Amendments” screen appears. At this point, the Grantee may view the amendment application but cannot perform any actions. As the amendment progresses through the review and approval process, the status updates.

Manage Amendments					
Grant Number	1Z0CMS331365				
Grantee Name	The CoE Training Center				
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN				
Project Start Date	09/02/2014				
Project End Date	09/01/2016				
Last Issued NGA	11/25/2014 ( <a href="#">View NGA</a> )				
Amendment #	Status	Submitted Date	Type	Budget Period	Action
1Z02015001434 	Submitted (Post Award)	12/01/2014 09:49:08 AM	Revision (Budget)	1 09/02/2014 - 09/01/2015	<a href="#">View Amendment</a> <a href="#">Grant Notes</a> <a href="#">History</a> <a href="#">Send Message</a>

Figure 74: Manage Amendments screen

25. If the Grantor needs the Grantee to make changes to the application, the Grantor can *Return* the amendment for edits.

Assigned users with the roles Grantee Authorizing Official (ADO) and Principle Investigator/Program Director (PI/PD) for the latest issued Notice of Award and for the active budget period receive email notification when an application is returned.

The application status changes to *Work in Progress* and the **Edit Amendment** link is available.

Amendment #	Status	Submitted Date	Type	Budget Period	Action
1Z02015001434 	Work In Progress (Post Award)		Revision (Budget)	1 09/02/2014 - 09/01/2015	<a href="#">Edit Amendment</a> <a href="#">Delete Amendment</a> <a href="#">Grant Notes</a> <a href="#">History</a> <a href="#">Send Message</a> <a href="#">Set Budget Period</a>

Figure 75: Manage Amendments screen

26. Make any changes and re-submit the amendment application.

## Non-Competing Continuations

Non-Competing Continuations can be viewed and processed in the GrantSolutions GMM. If the Grantee organization qualifies for more than one period of support, the application process can be performed in the system. Typically, a non-compete condition exists where the current budget period end date is before the project period end date and requires a new budget period for an existing project. If the Grantee qualifies for a non-compete application, the “My Grants List” visibly displays the *status* and *apply* links.

Once the awarding agency posts the non-competing continuation kit (application package), the Grantee may select the **Apply For Non Competing Award** link to begin the application process.

*Note: Once started, Non-Competing applications may be accessed via the Applications menu or from the “My Grants List” screen.*

To apply for a Non-Competing Continuation in the GrantSolutions GMM:

1. From the “My Grants List” screen, locate the grant and click the link **Apply For Non Competing Award**.

Grant Number:	1 HBEIE130131-01-00	<a href="#">View NGA</a>
Grant Program:	State Exchange Planning and Implementation	<a href="#">Grant Notes</a>
Program Office:	OCIIO/OHIE	<a href="#">Send Message</a>
Project Title:	State Exchange Test	<a href="#">History</a>
Award Issue Date: 	06/25/2013	<a href="#">Manage Amendments</a>
Project Period:	09/25/2013 to 11/12/2014	
Budget Period:	09/25/2013 to 09/24/2014	
Total Approved Budget (Federal):	\$100,000	
Next T&C Due Date:	N/A	
Status:	Work In Progress (Post Award) (Budget Revision )	
Non Competing Status:	LATE	<a href="#">Apply For Non Competing Award</a>
Non Competing Due Date:	08/15/2013	

Figure 76: My Grants List - Apply for Non Completing Award link

- The “GrantSolutions Non-Competing Continuation Application Control Checklist” screen appears with the status *Work in Progress*.

### GrantSolutions Non-Competing Continuation Application Control Checklist

**Work in Progress**

This is your GrantSolutions Application Control Checklist (EACC). You will use the EACC to track the status of your application.

To complete your application electronically, enter information by using the online forms and/or adding attachments (upload/mail-in). Required items are noted by the exclamation point image. If an enclosure has not been verified, a red 'X' image is displayed.

**Print Application:**

[Original Submission](#)

Grantee	The Swivel Chair Center
Grant Number	HBEIE130131
Application Number	(To be assigned)

Figure 77: GrantSolutions Non-Competing Continuation Application Control Checklist screen

- The checklist screen contains the following information:
  - Status:** The status of the application. Statuses include Work in Progress and Submitted
  - Print Application – Original Submission:** Click the *Original Submission* link to view, print, or save a PDF of the entire application package (completed forms, attachments, etc.)
  - Grantee, grant, and project information:** Read-only information about the award

### GrantSolutions Non-Competing Continuation Application Control Checklist

**Work in Progress** General Instructions

This is your GrantSolutions Application Control Checklist (EACC). You will use the EACC to track the status of your application.

To complete your application electronically, enter information by using the online forms and/or adding attachments (upload/mail-in). Required items are noted by the exclamation point image. If an enclosure has not been verified, a red 'X' image is displayed.

**Print Application:**

[Original Submission](#) ← View entire Non-Compete application as a PDF

Grantee	The Swivel Chair Center
Grant Number	HBEIE130131
Application Number	(To be assigned) <span style="color: red;">← General Information</span>
Project Title	State Exchange Test
Due Date	08/15/2013 12:00 AM (GMT - 05:00) Eastern Time (US & Canada)

Grant Announcement	Enclosure(s)	Attachment(s)	S
Cooperative Agreement to Support Establishment of the Affordable Care Act's Health Insurance Exchanges	<a href="#">View PDF Version</a> <a href="#">View Original Version</a>	N/A	

Figure 78: GrantSolutions Non-Competing Continuation Application Control Checklist - General Instructions and Information

- **Application Kit:** Includes online forms, enclosures, attachments, and form status

Grant Announcement	Enclosure(s)	Attachment(s)	Status
Cooperative Agreement to Support Establishment of the Affordable Care Act's Health Insurance Exchanges	<a href="#">View PDF Version</a> <a href="#">View Original Version</a>	N/A	⏏
Online Forms	Enclosure(s)	Attachment(s)	Status
Change Grantee Information	<a href="#">Enter Online</a>	N/A	⏏
Change Project Director	<a href="#">Enter Online</a>	N/A	⏏
SF-424 Application for Federal Assistance Version 2	<a href="#">Enter Online</a>	N/A	⏏
SF-424A Budget Information - Non-Construction	<a href="#">Enter Online</a>	N/A	⏏
SF-424B Assurances - Non-Construction	<a href="#">Enter Online</a>	N/A	⏏
SF-LLL Disclosure of Lobbying Activities	<a href="#">Enter Online</a>	0 Uploaded Files 1 Mail-in Items	⚠
Program Narrative	Enclosure(s)	Attachment(s)	Status
CCIO - Budget Narrative (Upload File)		N/A	⏏
CCIO - Project Narrative (Upload File)		N/A	⏏
Additional Information to be Submitted	Enclosure(s)	Attachment(s)	Status
Cover Letter		N/A	⏏
CCIO - Miscellaneous Information		N/A	⏏

Figure 79: GrantSolutions Non-Competing Continuation Application Control Checklist - Application Kit

- **Verify Submission:** Submit application
  - **Close:** Return to the “My Grants List” screen
4. To enter an online form, select the **Enter Online** link to the right of the form name.

Note: Required forms vary by program and awarding agency.

Online Forms	Enclosure(s)	Attachment(s)	Status
SF-424 Application for Federal Assistance Version 2	<a href="#">Enter Online</a>	N/A	L
SF-424A Budget Information - Non-Construction	<a href="#">Enter Online</a>	N/A	L
SF-424B Assurances - Non-Construction	<a href="#">Enter Online</a>	N/A	L
SF-LLL Disclosure of Lobbying Activities	<a href="#">Enter Online</a>	N/A	L

Figure 80: GrantSolutions Non-Competing Continuation Application Control Checklist screen - Enter Online link

5. The selected online form displays. Enter all necessary information.

Note: When entering dollar amounts, do not use the dollar sign (\$) or commas.

6. Upon completing the form, click the **Save** button.

Authorized Representative *	Completed on Submission	Completed on Submission
<input type="button" value="Save"/> <input type="button" value="Close"/>		

Figure 81: Online form - Save button

*Tip: On the 424A only, the message “Would you like to transfer your budget totals information to the SF-424 form” appears. Click Yes.*

- If there are no errors, the *Save Successful* message appears at the bottom of the screen.

Note: If there are problems, an error icon (red circle with white exclamation point) appears next to the cells that need corrections. To view the error text, point to the error icon with the mouse. Make change and then click the Save button again.

- Click the **Close** button.

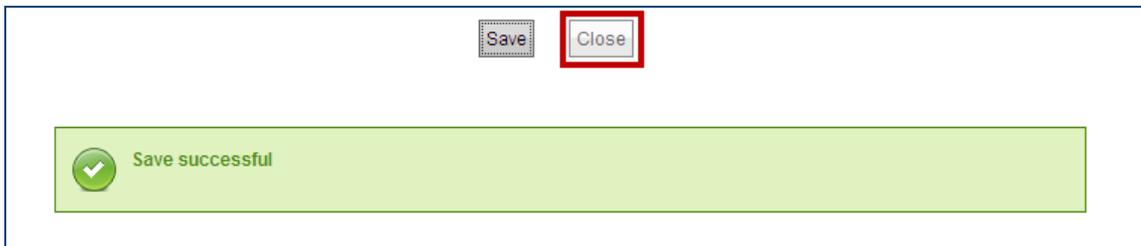


Figure 82: Online form - Close button

- The “GrantSolutions Non-Competing Continuation Application Control Checklist” screen appears. Complete additional forms and attach any necessary files. To attach a file, locate the desired row and click the **Uploaded Files** link from the *Attachments* column.

Program Narrative	Enclosure(s)	Attachment(s)	Status
Budget Narrative		<a href="#">Uploaded Files</a> <a href="#">Mail-in Items</a>	⚠

Figure 83: Attachments column - Uploaded Files link

- The “Attachments” screen appears. Click the **Upload Attachment** button.

Enclosure: Budget Narrative  
Number of Attachments: 0

Item Description	Type	Review	Action
(Empty)			

Figure 84: Attachments screen

- The “Attachment – Upload” screen appears in a new window. Enter a file description in the **Description** field, **choose a file to attach**, and click the **Attach** button.

\*Description:

Select a file

\*Step 1:  No file chosen

Step 2: Press the attach button to have GrantSolutions upload the file. Please allow sufficient time for the file upload to complete. This will vary based upon your connection speed and the size of your file. If the file is successfully uploaded, you will be returned to the attachment list.

Figure 85: Attachment - Upload window

- The “Attachments” screen appears, and the attachment is visible. Click the **Close** button.

Enclosure: Budget Narrative  
Number of Attachments: 1

Item	Description	Type	Review	Action
	Budget Narrative	Upload	Pending	<a href="#">Remove</a>

Figure 86: Attachments screen

- The “Application Control Checklist” screen reappears. Once all data is entered, saved, and any documents uploaded, click the **Verify Submission** button located towards the bottom of the screen.

Non Competing Application Package Status: Work in Progress

Submission Notice

GrantSolutions does not hold any responsibility for data loss prior to your submission. Your electronic submission remains...

Figure 87: Verify Submission and Close buttons

14. The “GrantSolutions Non Competing Application Submission Verification” screen appears. Click the **Final Submission** button to submit the application. Once submitted, the Grantee may not alter any information.

### GrantSolutions Non Competing Application Submission Verification

You are about to submit the following application:

Grantee	The Swivel Chair Center
Grant Number	HBEIE130131
Project Title	State Exchange Test
Due Date	08/15/2013 12:00 AM(GMT - 05:00) Eastern Time (US & Canada)

**Online Forms**

SF-424A Budget Information - Non-Construction
*** SF-LLL Disclosure of Lobbying Activities
----- (Mail-in Signature Page) Required Signature Page - Please sign & mail in.

\*\*\* It appears from what you have entered that your application is not complete. To correct, press the "Cancel" button to return to the Application Control Checklist.

\* Prior to submitting your application, it is recommended that you complete the Central Contractor Registration validation process. To continue with the application submission process without validating your Organization, click "Final Submission" Otherwise, click "Cancel" and perform the Central Contractor Registration validation process within your Organization record.

★ Enter the date Office of Acquisitions and Grants Management will receive your package of mail-in attachments:  (MM/DD/YYYY)

Final Submission
Cancel

Figure 88: GrantSolutions Non Competing Application Submission Verification screen

15. The “Non Competing Application Status Confirmation” screen displays. Click the **Application Control Checklist** button to view the read-only checklist screen and verify the status.

### Non Competing Application Status Confirmation

Grants has marked the following application as submitted:

\* Please submit signed copies of forms if you have been instructed by your program or grant office.

Office of Acquisitions and Grants Management  
7500 Security Boulevard  
Baltimore, MD 21244-1850-1850

Grantee:	The Swivel Chair Center
Grant Number:	HBEIE130131
Project Title:	State Exchange Test
Due Date:	08/15/2013 12:00 AM(GMT - 05:00) Eastern Time (US & Canada)
Submitted Date:	05/20/2014 04:36 PM Eastern Time

**Application Details**

<b>Items</b>
SF-424A Budget Information - Non-Construction

Application Control Checklist

Figure 89: Non Competing Application Status Confirmation

16. Click the **Close** button to access the “My Applications List” screen or select **Grants → My Grants** to return to the “My Grants List” screen.

*Note: The “My Applications List” screen may also be accessed by selecting Applications from the menu bar.*

## Appendix A

### TWO-FACTOR AUTHENTICATION

The first time a Grantee user logs into GrantSolutions, they are presented with the *GrantSolutions Enhanced Security Option* message. Click **Yes** to turn on two-factor authentication or click **No** to continue without enabling the feature.

Before selecting Yes, first confirm that you are able to receive the randomly generated code by smart phone, voice call-back, or a text message. If you are not sure, select No. Two-factor authentication can always be turned on when logged into GrantSolutions from your Profile screen.

*Note: If you are unable to receive the code after selecting Yes, please contact the GrantSolutions Help Desk for assistance.*

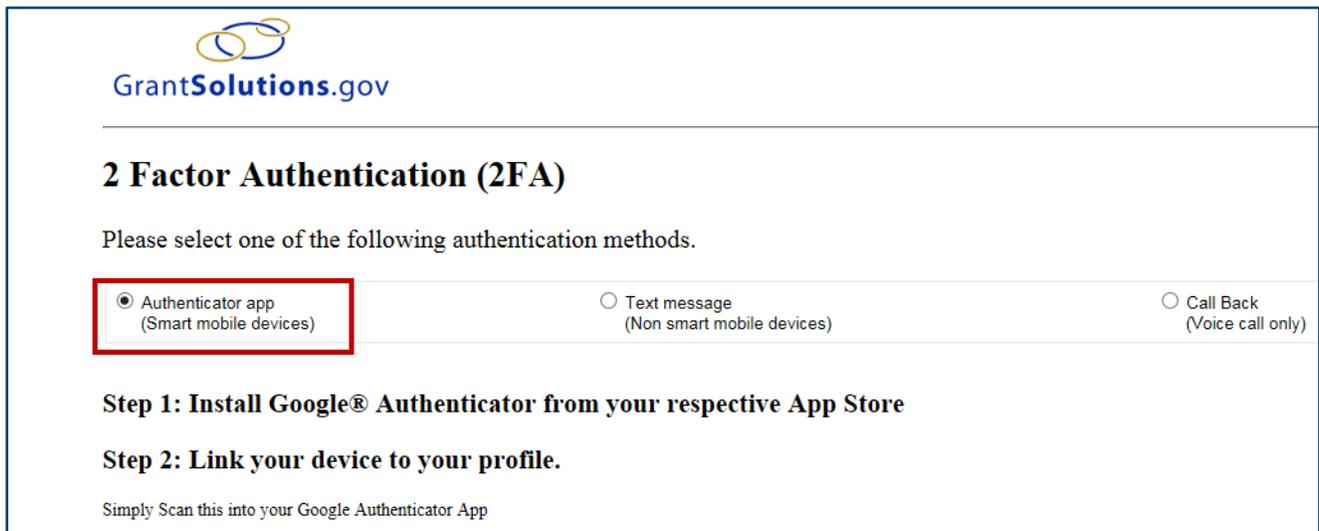


Figure 90: GrantSolutions Enhanced Security Option

To log into the GMM with a username, password, and randomly generated key code, it is first important to select the method of passcode generator.

Option 1: Smart Phone (Google Authenticator App)

1. Download the *Google Authenticator* app to an Android, Apple (iPhone, iPad, etc.), or Blackberry device.
2. Log into the GMM with the username and password.
3. The “2 Factor Authentication” screen appears. Select the radio button **Authenticator app (Smart mobile devices)**.



  
GrantSolutions.gov

---

### 2 Factor Authentication (2FA)

Please select one of the following authentication methods.

Authenticator app  
(Smart mobile devices)       Text message  
(Non smart mobile devices)       Call Back  
(Voice call only)

**Step 1: Install Google® Authenticator from your respective App Store**

**Step 2: Link your device to your profile.**

Simply Scan this into your Google Authenticator App

Figure 91: 2 Factor Authentication (2FA) screen

- The first time two-factor authentication is used in the GMM, a barcode and Key are provided in order to link your GMM profile to Google Authenticator.

### 2 Factor Authentication (2FA)

Please select one of the following authentication methods.

Authenticator app (Smart mobile devices)
  Text message (Non smart mobile devices)
  Call Back (Voice call only)

**Step 1: Install Google® Authenticator from your respective App Store**

**Step 2: Link your device to your profile.**

Simply Scan this into your Google Authenticator App


OR

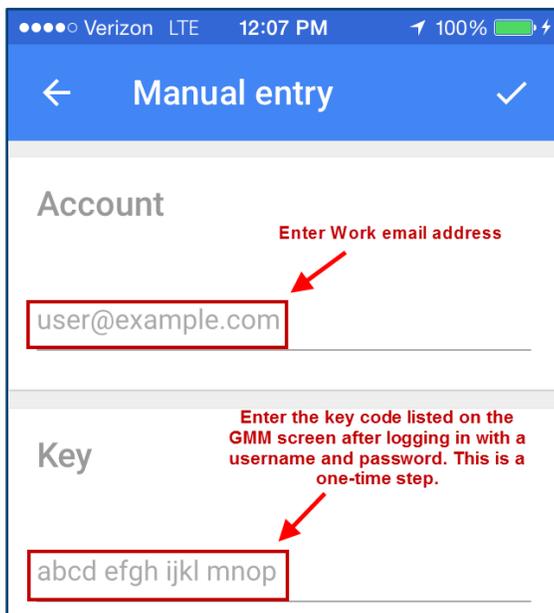
Manually enter the following information

Key: PJDO897LUNS8798F

**Step 3: Enter the code**

Figure 92: Factor Authentication (2FA) screen - Barcode and Key

- From your smart phone or other device's app store, download **Google Authenticator**.
- From the Google Authenticator app on your smart phone or other device, either scan the barcode with your device's camera or enter your work email address and the Key provided from the GMM screen.



The screenshot shows the 'Manual entry' screen in the Google Authenticator app. At the top, the status bar shows 'Verizon LTE', '12:07 PM', and '100%' battery. The app header is blue with a back arrow and a checkmark. Below the header, there are two sections: 'Account' and 'Key'. In the 'Account' section, there is a text input field containing 'user@example.com', with a red arrow pointing to it and the text 'Enter Work email address'. In the 'Key' section, there is a text input field containing 'abcd efgh ijkl mnop', with a red arrow pointing to it and the text 'Enter the key code listed on the GMM screen after logging in with a username and password. This is a one-time step.'

Figure 93: Google Authenticator App on iPhone - Key Setup

- The app is now ready to generate passcodes for use each time you log into the GMM.

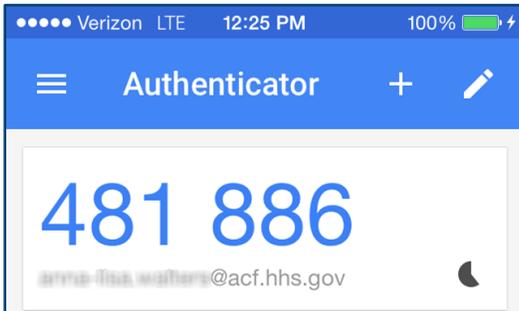


Figure 94: Google Authenticator App on iPhone -Randomly Generated Code

**Note:** The randomly generated code is valid for 30 seconds and then updates to a new code.

- Enter the six digit randomly **generated code** in the GMM *Passcode* field, and click **Submit**.

### 2 Factor Authentication (2FA)

Please select one of the following authentication methods.

Authenticator app  
(Smart mobile devices)
  Text message  
(Non smart mobile devices)
  Call Back  
(Voice call only)

**Step 1: Install Google® Authenticator from your respective App Store**

**Step 2: Link your device to your profile.**

Simply Scan this into your Google Authenticator App


OR

Manually enter the following information

Key: **PJDO897LUNS8798F**

**Step 3: Enter the code**

Enter the 6 digit code from your Smart Mobile device ( The code is valid for 30 seconds)

Passcode

Figure 95: Factor Authentication (2FA) screen – Passcode

- The “My Grants List” screen appears.

## Option 2: SMS Text

In your personal profile, add a mobile phone number and carrier to receive the randomly generated Passcode via text message. Contact the help desk for assistance if you are unable to log into the GMM to update your profile.

To set up your GMM account for text messages:

1. Log into the GMM.
2. Towards the top of the screen, click the **username link** for quick access to the personal profile.



Figure 96: Grants List - Username link

3. The “Profile Update” screen appears. Enter your **Mobile** number and select the **Carrier** from the drop-down list. Click the **Save** button.

### Profile Update for

**\* indicates a required field.**

Prefix *	Other <input type="text"/>	<input type="button" value="v"/>
	If other, specify <input type="text"/>	
Position Title *	Trainer/Support Analyst <input type="text"/>	
Work Phone *	202-401-5282 <input type="text"/>	
Fax	<input type="text"/>	
Mobile	301- 555-1212 <input type="text"/>	
Carrier(Carrier charges may apply)	Verizon <input type="text"/>	<input type="button" value="v"/> <input type="button" value="Test SMS"/>
Other Phone	<input type="text"/>	
Email *	Joseph.Doe@acf.hhs.gov <input type="text"/>	

Figure 97: Profile Update screen - Mobile and Carrier fields

4. The Grants List screen appears.

To log into the GMM using Two-Factor Authentication via text message:

1. Log into the GMM with the username and password.
2. The “2 Factor Authentication (2FA)” screen appears. Select the **Text Message (Non-smart mobile devices)** radio button.



Figure 98: 2 Factor Authentication (2FA) screen - Text message radio button

3. The screen refreshes. Under step 1, click the **Send Passcode** button to receive the randomly generated code via text message.

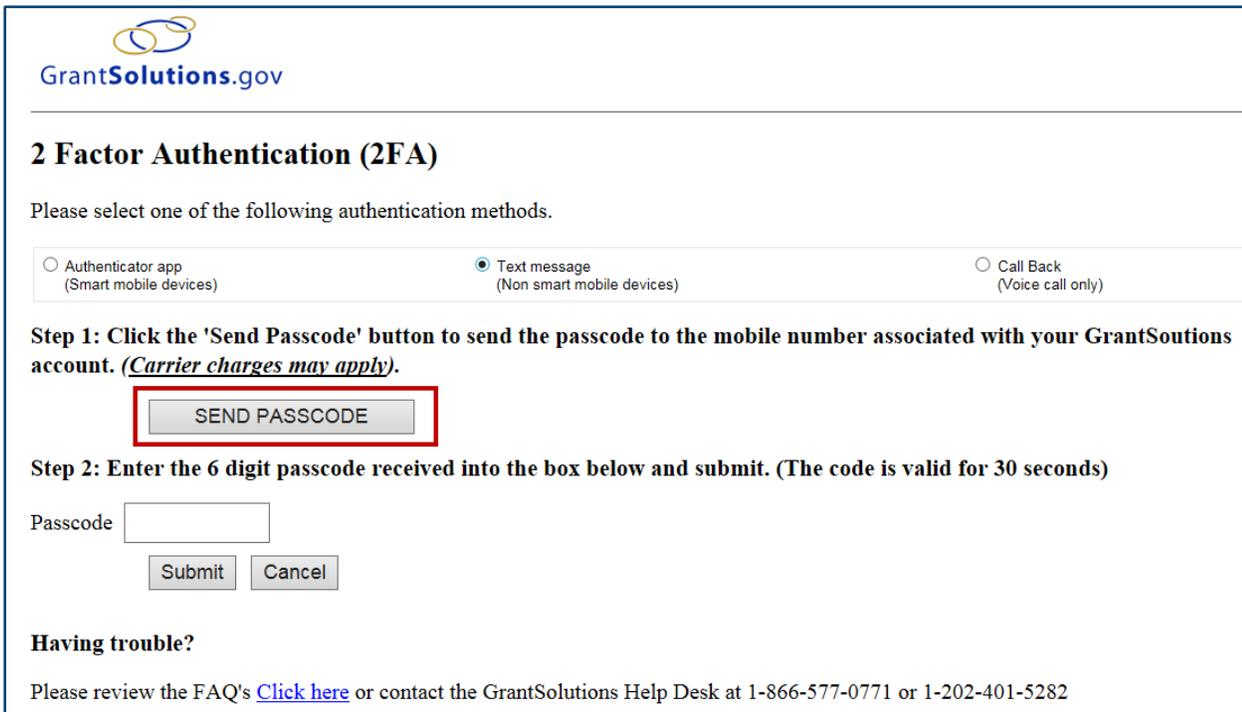


Figure 99: 2 Factor Authentication screen - Send Passcode button

- Once received, enter the code in the *Passcode* field. Click the **Submit** button.

### 2 Factor Authentication (2FA)

Please select one of the following authentication methods.

Authenticator app  
(Smart mobile devices)
  Text message  
(Non smart mobile devices)
  Call Back  
(Voice call only)

**Step 1: Click the 'Send Passcode' button to send the passcode to the mobile number associated with your GrantSolutions account. (*Carrier charges may apply*).**

**Step 2: Enter the 6 digit passcode received into the box below and submit. (The code is valid for 30 seconds)**

Passcode

**Having trouble?**

Figure 100: 2 Factor Authentication screen - Passcode field

- The “My Grants List” screen appears.

### Option 3: Call Back

In your personal profile, add up to three phone numbers for use to receive a computer-generated call with a passcode.

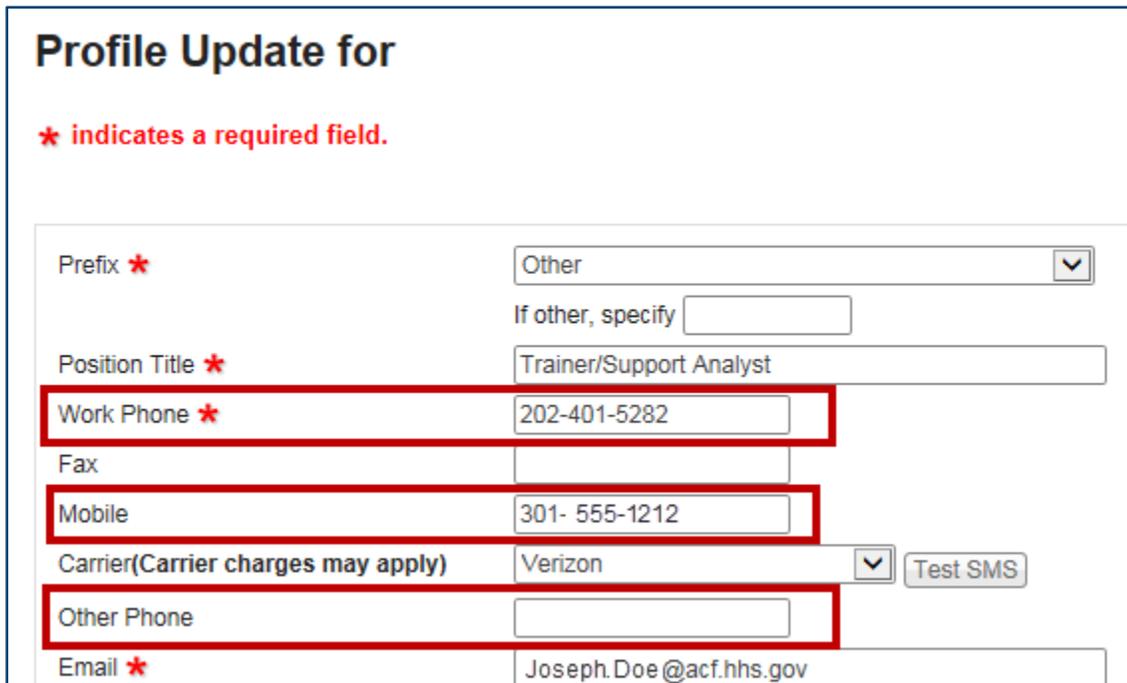
To set up your GMM account for call back:

- Log into the GMM.
- Towards the top of the screen, click the **username link** for quick access to the personal profile.

JDoe | GrantSolutions-5.8.0.16 11/1/2015 | [Log Out](#)

Figure 101: Grants List - Username link

3. The “Profile Update” screen appears. Enter up to three phone numbers (Work Phone, Mobile, and Other Phone). Click the **Save** button.



**Profile Update for**

**\* indicates a required field.**

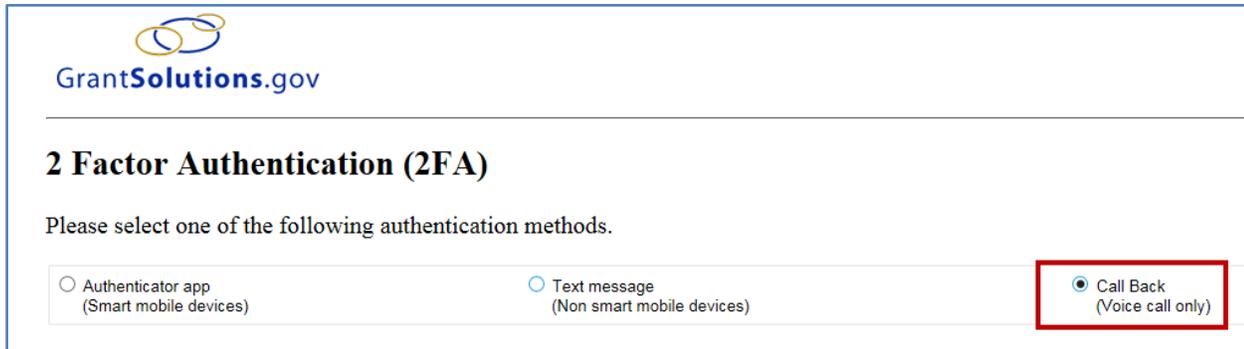
Prefix *	Other	<input type="button" value="v"/>
	If other, specify <input type="text"/>	
Position Title *	Trainer/Support Analyst	
Work Phone *	202-401-5282	
Fax	<input type="text"/>	
Mobile	301- 555-1212	
Carrier(Carrier charges may apply)	Verizon	<input type="button" value="v"/> <input type="button" value="Test SMS"/>
Other Phone	<input type="text"/>	
Email *	Joseph.Doe@acf.hhs.gov	

Figure 102: Profile Update screen – Phone number fields

4. The “My Grants List” screen appears.

To log into the GMM using two-factor authentication via Call Back:

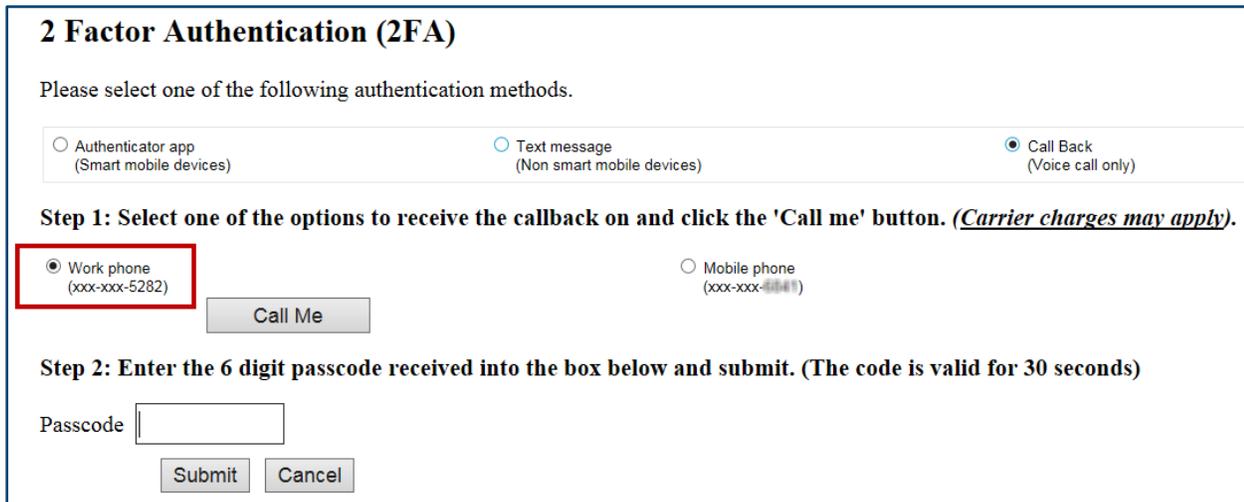
1. Log into the GMM with the username and password.
2. The “2 Factor Authentication (2FA) screen appears. Select the **Call Back (Voice call only)** radio button.



The screenshot shows the GrantSolutions.gov logo at the top left. Below it is the heading "2 Factor Authentication (2FA)". A message reads: "Please select one of the following authentication methods." There are three radio button options: "Authenticator app (Smart mobile devices)", "Text message (Non smart mobile devices)", and "Call Back (Voice call only)". The "Call Back (Voice call only)" option is selected and highlighted with a red rectangular box.

Figure 103: 2 Factor Authentication (2FA) screen - Call Back radio button

3. The screen refreshes. In step 1, select the radio button next to the number for the call back.



The screenshot shows the "2 Factor Authentication (2FA)" heading. Below it is the message: "Please select one of the following authentication methods." There are three radio button options: "Authenticator app (Smart mobile devices)", "Text message (Non smart mobile devices)", and "Call Back (Voice call only)". The "Call Back (Voice call only)" option is selected. Below this, there is a "Step 1" instruction: "Step 1: Select one of the options to receive the callback on and click the 'Call me' button. (Carrier charges may apply)." There are two radio button options: "Work phone (xxx-xxx-5282)" and "Mobile phone (xxx-xxx-5541)". The "Work phone (xxx-xxx-5282)" option is selected and highlighted with a red rectangular box. Below these options is a "Call Me" button. Below the "Call Me" button is a "Step 2" instruction: "Step 2: Enter the 6 digit passcode received into the box below and submit. (The code is valid for 30 seconds)". There is a "Passcode" label followed by a text input field. Below the input field are "Submit" and "Cancel" buttons.

Figure 104: 2 Factor Authentication (2FA) screen - Work Phone radio button

- Once the call back message is received, enter the **passcode** in the *Passcode* field and click the **Submit** button.

### 2 Factor Authentication (2FA)

Please select one of the following authentication methods.

Authenticator app  
(Smart mobile devices)

Text message  
(Non smart mobile devices)

Call Back  
(Voice call only)

**Step 1: Select one of the options to receive the callback on and click the 'Call me' button. (*Carrier charges may apply*).**

Work phone  
(xxx-xxx-5282)

Mobile phone  
(xxx-xxx-####)

Call Me

**Step 2: Enter the 6 digit passcode received into the box below and submit. (The code is valid for 30 seconds)**

Passcode

Submit Cancel

Figure 105: 2 Factor Authentication (2FA) screen - Passcode field

- The “My Grants List” screen appears.