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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](image-url)

![Getting Started – Request a User Account screen](image)

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:

<table>
<thead>
<tr>
<th>Role</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grantee Administrative Official (ADO)</td>
<td>The Grantee Administrative Official (ADO) is responsible for the oversight of activities performed by the Grantee Security Monitor.</td>
</tr>
<tr>
<td></td>
<td>- Accept award on behalf of organization</td>
</tr>
<tr>
<td></td>
<td>- Submit Applications/Amendments</td>
</tr>
<tr>
<td></td>
<td>- Submit Federal Financial Reports</td>
</tr>
<tr>
<td></td>
<td>- View Awards</td>
</tr>
<tr>
<td>Principal Investigator/Program Director (PI/PD)</td>
<td>The Principal Investigator/Program Director (PI/PD) is responsible for the oversight of activities performed by the Grantee Support Staff.</td>
</tr>
<tr>
<td></td>
<td>- Submit Applications/Amendments</td>
</tr>
<tr>
<td></td>
<td>- Submit Federal Financial Reports (FFR)</td>
</tr>
<tr>
<td></td>
<td>- View Awards</td>
</tr>
<tr>
<td>Grantee Support Staff (GSS)</td>
<td>The Grantee Support Staff’s role is to assist the Principal Investigator or Program Director in the Grantee organization.</td>
</tr>
<tr>
<td></td>
<td>- View and submit Applications/Amendments</td>
</tr>
<tr>
<td></td>
<td>- Enter FFR information but cannot submit</td>
</tr>
<tr>
<td></td>
<td>- View Awards</td>
</tr>
<tr>
<td>Grantee Financial Official (FO)</td>
<td>The Grantee Financial Official (FO) is responsible for the oversight of activities performed by the Grantee Financial Support Staff.</td>
</tr>
<tr>
<td></td>
<td>- Submit Applications/Amendments</td>
</tr>
<tr>
<td></td>
<td>- Submit Federal Financial Reports</td>
</tr>
<tr>
<td></td>
<td>- View Awards</td>
</tr>
<tr>
<td>Grantee Financial Support Staff (FSS)</td>
<td>The Grantee Financial Support Staff (FSS) role is to assist the Grantee Financial Official in the Grantee organization.</td>
</tr>
<tr>
<td></td>
<td>- View and submit Applications/Amendments</td>
</tr>
<tr>
<td></td>
<td>- Enter FFR information but cannot submit</td>
</tr>
<tr>
<td></td>
<td>- View Awards</td>
</tr>
</tbody>
</table>
GrantSolutions Help Desk
The GrantSolutions Help Desk is available to assist Grantees with technical questions about the system.

Email: 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
- At the bottom of every page when logged into the GrantSolutions GMM
Frequently Asked Questions

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

Frequently Asked Questions

FAQs

How can I request a GrantSolutions account?
Is my Grants.gov account the same as my GrantSolutions.gov account?
Can my organization have more than one GrantSolutions.gov account?
Why did I not receive my GrantSolutions password?
My password does not work and I’ve tried several times; how can I gain access to my account?
Why does GrantSolutions have such a complicated password convention?
How often does my password need to change?
On the GrantSolutions user account forms, who is the Authorized Organization Representative?
Where can I find new funding opportunities?
Where can I get support for Grants.gov?
Who should I contact if I’m interested in using GrantSolutions.gov as our grants management system?
**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](image)

**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](image)
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.

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.

   **GrantSolutions Enhanced Security Option**

   GrantSolutions now provides an enhanced security option for end users. Two-factor authentication provides an extra layer of account security, helping to protect your personal and organizational information. After enabling two-factor authentication, when you log in with your username and password, you will be prompted to enter a passcode. This passcode may be provided to you in 3 different ways: using your smart phone, a voice call-back message, or a text message.

   Please select "Yes" to enable this option. Select "No" to turn on from your Update Profile screen at a later time.

   ![Login screen](image)

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.

![Figure 12: Change Password screen](image-url)
6. The GrantSolutions “Login” screen reappears. Enter your **Username** and the newly changed **Password**, and then click the **Login** button.

![Figure 13: GrantSolutions Login screen](image)

7. The “My Grants List” screen displays.

![Figure 14: My Grants List screen](image)
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**.
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](image-url)
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.

   *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.

8. The screen refreshes and the message “Your password has been changed successfully” appears. Click the **Back to Login Screen** link.
9. The “GrantSolutions Login” screen appears. Enter your **Username**, new **Password**, and click the **Login** button.

![Figure 21: GrantSolutions Login screen](image)

10. The “My Grants List” screen appears.

![Figure 22: My Grants List screen](image)
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.

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

![Figure 23: Password expiration prompt from within GrantSolutions](image1)

![Figure 24: Change Password screen](image2)
3. The “Confirmation of New Password” screen displays. Click the **Re-Login** button.

![Confirmation of New Password screen](image)

**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.

![My Grants List screen](image)

**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.

![Menu Bar](image)

**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

![Account Management menu](image)
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.

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

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

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”.

![Grants Menu](image)

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*.

![My Grants List screen - Grants: Pending Grants submenu](image)
3. 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**.

4. 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.

5. To accept the award, from the *Action* column, click the **Accept** link.
6. The “Accept Grant – Transition Status” screen opens in a new window. Click the OK button.

![Accept Grant - Transition Status screen](image)

Figure 36: Accept Grant - Transition Status screen

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

![Changed Notices of Grant Awards screen](image)

Figure 37: Changed Notices of Grant Awards screen

8. 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.

![Pending Grants screen](image)

Figure 38: Pending Grants screen
9. The “My Grants List” screen appears, and the accepted grant is available.

![My Grants List screen](image)

**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.

![Reports Menu - Federal Financial Report](image)

**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.

![Online Data Collection menu](image)
Help/Support
Use the Help/Support – Documentation menu to access the “Grantee Support and Reference” site.

![Help/Support – Documentation menu](image)

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

![Grantee Support and Reference site](image)

**Grantee Support and Reference**

The GrantSolutions.gov mission is to provide a comprehensive and cost-effective grants management solution for grantees, 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 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 (OLDC) 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.

![Figure 44: My Grants List screen](image)
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](image)

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).

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](image)
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

![Figure 47: Grant Notes screen](image)
4. To add a new note, scroll towards the bottom of the window and click the Add button.

![Grant Notes screen - Add button](image)

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

![Grant Notes - Add screen](image)

**Figure 49: Grant Notes - Add screen**

7. The “Grant Notes” screen reappears. Once a note is submitted, it is available for viewing in the GrantSolutions GMM.

8. 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.
9. Only the author of the note can Edit or Delete the note. All other users with access to the grant have view-only access.

![Figure 50: Grant Notes table - Action column](image)

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

![Figure 51: Grant Notes table - Cancel button](image)

**HISTORY**

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

![Figure 52: History link and Grant History screen](image)
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**.

*Note: If more than one grant is available from the My Grants List screen, scroll through the page until the desired grant is located.*
2. The “Manage Amendments” screen appears. All amendments are initiated and tracked from this screen. To begin a new amendment action, click the New button.

![Figure 54: Manage Amendments screen - New button](image)

3. 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.

![Figure 55: Select Amendment Type screen](image)
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 Mange Amendment screen
5. 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.

![Close button](Image)

**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.*

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

![Manage Amendments](Image)

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

7. 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.
8. To electronically complete a form in the GrantSolutions GMM, click the **Enter Online** link for the desired form (i.e. SF-424A).

![Figure 59: Application Control Checklist - Application Kit (Package) section](image)

*Note: Forms vary depending on the Amendment type.*

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

![Figure 60: SF-424A Online Form](image)
10. When done, scroll to the bottom of the screen and click the **Save** button.

![Figure 61: SF-424A - Save button](image)

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

![Figure 62: Would you like to transfer your budget totals information to the SF-424 form message](image)

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.

![Figure 63: Close button](image)
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.

<table>
<thead>
<tr>
<th>Online Forms</th>
<th>Enclosure(s)</th>
<th>Attachment(s)</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>SF-424 Application for Federal Assistance Version 2</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>SF-424A Budget Information - Non-Construction</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Information for the Applicant</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>CMS Amendment Types &amp; Guidance for Submission</td>
<td>View PDF</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Program Narrative</td>
<td>View Original Version</td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 64: Application Kit**

<table>
<thead>
<tr>
<th>Status Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>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.</td>
</tr>
<tr>
<td>!</td>
<td>It is recommended that you complete this item.</td>
</tr>
<tr>
<td>✗</td>
<td>Not started (optional).</td>
</tr>
<tr>
<td>✗</td>
<td>The enclosure is not validated (Incomplete).</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Online Forms</th>
<th>Enclosure(s)</th>
<th>Attachment(s)</th>
<th>Status</th>
</tr>
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<tbody>
<tr>
<td>SF-424 Application for Federal Assistance Version 2</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>SF-424A Budget Information - Non-Construction</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Information for the Applicant</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>CMS Amendment Types &amp; Guidance for Submission</td>
<td>View PDF</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Program Narrative</td>
<td>View Original Version</td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 65: Attachments column - Uploaded Files link**
16. The “Attachments” screen appears. Click the **Upload Attachment** button.

![Figure 66: Attachments screen](image)

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.

![Figure 67: Attachment - Upload window](image)
18. The “Attachments” screen appears, and the attachment is visible. Click the Close button.

![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.

![Verify Submission button]
20. The “GrantSolutions Amendment Submission Verification” screen appears. Review the page to ensure all online forms are listed. Click Final Submission.

![Figure 70: GrantSolutions Amendment Submission Verification screen](image)

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.

![Figure 71: Warning Message](image)
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.

![Image: Amendment Status Confirmation screen](image)

**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.

![Image: Checklist screen Close button](image)

**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 screen](image)

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.

![Manage Amendments screen](image)

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.

![Figure 76: My Grants List - Apply for Non Completing Award link](image)
2. The “GrantSolutions Non-Competing Continuation Application Control Checklist” screen appears with the status *Work in Progress*.

![GrantSolutions Non-Competing Continuation Application Control Checklist](image)

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

3. 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](image)

*Figure 78: GrantSolutions Non-Competing Continuation Application Control Checklist - General Instructions and Information*
- **Application Kit**: Includes online forms, enclosures, attachments, and form status

![Table]

<table>
<thead>
<tr>
<th>Grant Announcement</th>
<th>Enclosure(s)</th>
<th>Attachment(s)</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooperative Agreement to Support Establishment of the Affordable Care Act’s Health Insurance Exchanges</td>
<td>View PDF Version</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Online Forms</td>
<td>Enclosure(s)</td>
<td>Attachment(s)</td>
<td>Status</td>
</tr>
<tr>
<td>Change Grantee Information</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Change Project Director</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>SF-424 Application for Federal Assistance Version 2</td>
<td>View Enclosures</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>SF-424A Budget Information - Non-Construction</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>SF-424C Assurances - Non-Construction</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>SF-LLL Disclosure of Lobbying Activities</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Program Narrative</td>
<td>Enclosure(s)</td>
<td>Attachment(s)</td>
<td>Status</td>
</tr>
<tr>
<td>COIO - Budget Narrative (Upload File)</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>COIO - Project Narrative (Upload File)</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional Information to be Submitted</td>
<td>Enclosure(s)</td>
<td>Attachment(s)</td>
<td>Status</td>
</tr>
<tr>
<td>Cover Letter</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>COIO - Miscellaneous Information</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.

![Table]

<table>
<thead>
<tr>
<th>Online Forms</th>
<th>Enclosure(s)</th>
<th>Attachment(s)</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>SF-424 Application for Federal Assistance Version 2</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>SF-424A Budget Information - Non-Construction</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>SF-424C Assurances - Non-Construction</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>SF-LLL Disclosure of Lobbying Activities</td>
<td>Enter Online</td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>

**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.

![Form]

**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.
7. 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 changes and then click the Save button again.

8. Click the **Close** button.

![Figure 82: Online form - Close button](image)

9. 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.

![Figure 83: Attachments column - Uploaded Files link](image)

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

![Figure 84: Attachments screen](image)
11. 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 window](image)

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

![Attachments screen](image)

13. 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.

![Verify Submission and Close buttons](image)
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](image)

**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](image)

**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.
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).*

![Image of 2 Factor Authentication (2FA) screen]

**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
4. 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.

![Figure 92: Factor Authentication (2FA) screen - Barcode and Key](image)

5. From your smart phone or other device’s app store, download Google Authenticator.

6. 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.

![Figure 93: Google Authenticator App on iPhone - Key Setup](image)
7. The app is now ready to generate passcodes for use each time you log into the GMM.

![Google Authenticator App on iPhone -Randomly Generated Code](image)

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

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

![Factor Authentication (2FA) screen – Passcode](image)

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.

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

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.

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

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

**Figure 99: 2 Factor Authentication screen - Send Passcode button**

Click here to review the FAQ's or contact the GrantSolutions Help Desk at 1-866-577-0771 or 1-202-401-5282.
4. Once received, enter the code in the Passcode field. Click the Submit button.

<table>
<thead>
<tr>
<th>2 Factor Authentication (2FA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please select one of the following authentication methods.</td>
</tr>
<tr>
<td>○ Authenticator app (Smart mobile devices)</td>
</tr>
<tr>
<td>○ Text message (Non smart mobile devices)</td>
</tr>
<tr>
<td>○ Call Back (Voice call only)</td>
</tr>
</tbody>
</table>

**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 field](image)

5. 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:

1. Log into the GMM.

2. Towards the top of the screen, click the username link for quick access to the personal profile.

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

![Profile Update screen – Phone number fields](image)

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.

   ![Figure 103: 2 Factor Authentication (2FA) screen - Call Back radio button](image)

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

   ![Figure 104: 2 Factor Authentication (2FA) screen - Work Phone radio button](image)

   **Step 1:** Select one of the options to receive the callback on and click the 'Call me' button. *(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)*
4. Once the call back message is received, enter the **passcode** in the *Passcode* field and click the **Submit** button.

![2 Factor Authentication (2FA) screen - Passcode field](image)

5. The “My Grants List” screen appears.