

GrantSolutions Overview

Module 9

Instructor notes:

Welcome to Module #9 which is part of the grants management training, but not part of the overall FMCSA Grants Management Lifecycle. The information is regarding the primary grants management system – GrantSolutions - used by FMCSA and some of the basic functions grantees will use within the system. None of this information is contained within the grantee manual. But further information regarding GrantSolutions in general can be found on their website, <https://home.grantsolutions.gov/home/>, as well as from your FMCSA Grant Manager.

Slide 2 Objectives

By the end of this module, you should be able to successfully:

- Understand your key actions in GrantSolutions (GS)

Instructor notes:

- During this module we will explain the grantee's key actions in GrantSolutions and basic functionality of the system, as it pertains to grants and grantees.

Slide 3 GrantSolutions Roles

Instructor notes:
(Transition Slide)

Slide 4 Key Grantee Roles

- **PI/PD** - Grantee Principal Investigator or Program Director
 - Grantee Grant Manager responsible for day to day operations
 - Can do most functions in GrantSolutions but cannot sign an NGA
 - Only view the grants to which individual has been assigned in the system

Instructor notes:

- Many of you may already be familiar with the PI/PD role, as many of you may have this role in GrantSolutions. It is the worker role, so that you can see the grants that will need your action and you can maneuver through the system.
- However, the PI/PD role cannot approve an NGA – you can see if, but can't act on it.
- You can have more than one PI/PD role for your organization, but you will want to keep it to a minimum. You may also assign a different PI/PD for each FMCSA grant program or grant you hold, but remember that the PI/PD can only see those grants to which they have been assigned.
- So you will need to make sure the FMCSA knows which Grant Managers are assigned to which grants and makes those assignments correctly prior to issuing the NGA.

Slide 5 Key Grantee Roles, Continued

- **ADO – Grantee Authorized Representative**
 - This is the Grantee Official who can legally obligate/bind the grantee organization to the grant agreement
 - View of all grants made to the Grantee Organization
 - Only sign FMCSA grants and those to which you are assigned

Instructor notes:

- The ADO role is the only role that has Grant Acceptance Authority – it is the signature role and presumably will only be used for signing off on the NGAs
- If the Grantee ADO needs to change you should notify FMCSA immediately so that you don't potentially have the wrong person signing off on any NGA or receiving the NGA in the first place.
- Your organization can have more than one ADO, as long as within your organization you know which ADO signs off on which grants.
- Another caveat to the ADO role is that in that you can see all grants in GrantSolutions made to your Grantee Organization. So if your organization also receives FRA grants, even if you aren't the ADO for those grants, you will be able to see them.
- However, in this role for FMCSA your responsibilities are just to review and approve only those grants to which you are officially assigned (FMCSA grants)
- The ADO may view, edit and submit financial reports on the grantee organization's behalf as well as may add and view Application and Grant Correspondence notes, upload files, and view grant documentation

Slide 6 Grantee Role Tips

- Original GrantSolutions roles are established based upon the Key Contact Form
- Email notifications of NGA is based on GrantSolutions role
- Grantee must notify FMCSA immediately upon changes to GrantSolutions roles or roles that need to be removed or deactivated
 - For example: the ADO has been Colonel Jim Smith. However he has been promoted and is no longer in this role

Instructor Notes:

- GrantSolutions roles are created based upon the Key Contact Form that you submit with your application. Therefore if the Key Contact Form is incorrect or it changes and you don't notify FMCSA, the email notification and the NGA is likely to go to the wrong person with the wrong name listed in the signature line.
- Be sure to keep the Key Contact Form information accurate. You can do so through a formal resubmission of the form if roles change or through an email to your local FMCSA Division Office, but it is important to keep them up to date.
- A copy of the Key Contact Form, with instructions, is in the grantee manual in Appendix K.
- plans to continue to use it according to laws and regulations. We will cover this later in this module.
- Upon final approval of the final reports and reconciliation, you will receive a "no further claims letter" from FMCSA(*) for pre-FY11 grants and a close-out amendment for all post-FY11 awards. Some pre-FY11 awards may have amendments as well, but not in Grant Solutions and some post-FY11 awards may receive both a "no further claims letter" as well as an amendment depending upon the program and the award.

Slide 7 General GrantSolutions Access

Instructor notes:
(Transition Slide)

Slide 8 E-Mail Notifications

- You will receive an email notification from GrantSolutions (Notifications@grantsolutions.gov) when an NGA is waiting for acceptance.

Instructor notes:

- You will be notified by email once you have been assigned a role in GrantSolutions, generally that will occur shortly before receipt of an NGA.
- FMCSA will send you a username and password (in two separate emails) to any new grantees at the outset.
- Then when an NGA is ready, both the Grantee PI/PD and ADO will receive an e-mail notification. Although both roles receive the notification and can see the NGA, only the ADO can accept the grant award
- When you hit the link in the email it will take you to the list of grants awaiting approval.
- Make sure that your email notification is on and isn't blocked by your system, in order to get notification that an NGA is awaiting approval.
- If your email notification isn't on, you may miss the notification and be unaware of your award and the need for your action on it.

Slide 9 Log In to GrantSolutions.gov

GrantSolutions.gov is <http://www.grantsolutions.gov/>

Instructor notes:

- You are probably already familiar with this, but just as a recap.
- Once you have obtained your username and password then you need to log into GrantSolutions.
- You can follow the link in the notification email directly or go to the website listed on the screen.

Slide 10 Log In to GrantSolutions.gov

- Contact for GrantSolutions system helpdesk
- Link for resetting password, etc.
- GrantSolutions.gov User Support
 - (202) 401-5282
 - (866) 577-0711
 - help@grantsolutions.gov
 - (8 AM – 6 PM Eastern Time M-F)

Instructor notes:

- Essentially you follow the instructions on the screen.
- In the Log-in box on the right you will type in your GrantSolutions.gov username and password and click on the Log In button.
- The first time you log into the GrantSolutions system, you will be required to set your own password. See the location indicated in the red circle to the right of the screen
- After setting your own password, you will then be returned to the login screen to enter the username and password that you set.
- For existing user accounts that have already been established, you may reset your password or unlock your account by pressing the Reset Password/Unlock Account link.
- If you have any difficulty in logging in, feel free to contact the User support listed on the bottom of the screen. Tier 1 type of assistance, things that are not exclusively system problems, such as the system shut down or passwords and system access should first go to the FMCSA GMO Help Desk. More technical questions go directly to the help desk noted above.

Slide 11 Log In to GrantSolutions.gov

Screen displayed once the user clicks on the Reset Password / Unlock Account Link

Instructor notes:

- When setting your own password, you must ensure that the password complies with the following restrictions.
- The minimum number of characters a password must contain is 8.
- At least one upper-case, one lower-case, one number, and one special character must be used.
- The password can't begin with a numeric character.
- Special characters include ! @ # \$ % & * = ? < >
- User accounts are locked out after **three consecutive unsuccessful login attempts**, so be careful as it is rather easy to lock yourself out. The account will remain locked out for 2 hours unless the passwords are reset by the GrantSolutions CAST Support Center or directory administrator.
- Passwords remain valid for 60 days and users will be prompted to change the password as the expiration date draws near. Remember if you are expecting that an award may be coming and you are close to your 60 days, be sure to go in and change your password prior to that point so that you don't get locked out just when you need to accept an award.

Slide 12 How to Accept a Grant Award?

Instructor notes:
(Transition Slide)

Slide 13 Grantee Award Acceptance

(GrantSolutions Pending Grants Screen)

Instructor notes:

- OK, now that you have gained access to GrantSolutions and you have your own password established, how do you move around in GrantSolutions in order to accept an award?
- Once you have signed in you will see this screen.
- In this view you can view and accept or decline the NGA, the actions are in the far right column with the red circle with the choices that you have.
- If you decline an NGA it will have to go back to the start of the process and all the way through the FMCSA change of approvals, so pick up the phone and contact FMCSA before doing so to discuss the best course of action.
- Be sure to review your NGA prior to accepting it to make sure that everything is accurate and that you are in agreement. We went over that entire process in Module 5: Grant Award.
- If Pending grants don't show up in the "Accepted Grants" area circled above it may be that you didn't access the NGA via your email notification link which is the best way to view all of your pending grants, see their status and to approve the NGA.

Slide 14 View and Print Grant Agreement (NGA)

(Screen Capture of a Grant Agreement)

Instructor notes:

- In order to view or print the NGA, select the View/Print link for the desired application. *A PDF version of the NGA is then displayed.*
- If you are going to view the entire NGA, you will need to scroll through the pages using the up and down arrows.
- **It is critical for you to ensure the accuracy of the information on the Grant Agreement, as this is a legally binding document and changes that need to be made after it is executed will require an amendment.**
- Most grantees will need to print the NGA so that it can go through their own internal clearance process, rather than just reviewing on-line and presumably more than just the PI/PD and ADO will need to view it.
- To print the NGA, click the printer icon and then click OK. Choose File > Close to close the NGA.
- As noted earlier, before you decline an NGA contact your Division Office, because decline will send it back to the very beginning, which may be an appropriate action, but to be sure, call your Division Office first.

Slide 15 Grantee Agreement Acceptance

(Grant Agreement Acceptance Screen)

Instructor notes:

- OK, once you have fully reviewed the document and are satisfied of its accuracy, you can then hit accept to move the document into final signature. (If logged in on an Account with ADO authority you will see these three links: View Award, Accept, Decline -- If logged in as a PI/PD you will only see the view award link)
- After you hit accept and approve the NGA, the system will prompt you to add Comments.
- If you care to add any comments, do so in the Add Comments box. This might be a typo correction, correction of a fax number or a comment regarding something of minor follow-up. It should not be where you put objections to the document that really need addressing prior to execution, nor is it where you just put ideal comments to the FMCSA grant manager, but if there is some minor item for which you want official system documentation, than this is the spot.
- Click OK when you are done.
- Then the system returns you to the Notice of Grants Awards screen after completing the approval and updates the workflow status accordingly.
- Then the State Program Manager, the FMCSA AO will receive the email notification to let them know that the NGA awaits their approval.
- Once both parties have signed the NGA, it is then considered executed

Slide 16 Additional Grant Solutions Functions and Resources

Instructor notes:
(Transition Slide)

Slide 17 NGA - Amendments

Follows the same process as for the original NGA
(Screen Capture of a Revised Notice of Grant Award)

- Directional Box indicating where to View Pending Amendments for Signature
- Directional Box indicating where to Accept Grantee Award Amendments
- Directional Box indicating where to View and Print Amended NGA

Instructor notes:

- Beyond the approval of NGAs in GrantSolutions the only other functionality that you are likely to use at this time is the receipt and approval of amendments.
- Amendments are in fact just changes and updates to the original NGA and essentially follow the same workflow.
- If FMCSA is issuing an amendment, based on your request or an action that they have generated you will receive an email that an amendment NGA is awaiting your review and signature
- In the top left view you can view and accept or decline the amendment NGA.
- If Pending grants don't show up in the "Accepted Grants" area circled above it may be that you didn't access the NGA via your email notification link
- As seen in the top right view, you will receive a copy of the original NGA, with the Amendment Box filled in with the Amendment number (1 for the first one, and then so on for subsequent amendments), the NGA will be updated depending on the type of amendment, for instance new Performance Period date for a no-cost extension or a new budget sheet for an updated budget amendment
- Select the View/Print link for the desired application. *A PDF version of the NGA is displayed.*
- To view the entire NGA, scroll through the pages using the up and down arrows.
- **Just as with the original NGA it is critical for you to review the document for accuracy of the information on the amended Grant Agreement**
- All other actions are just as they are for the original NGA in terms of how to print, how to decline or accept, how to include comments and how to move it on to the Service Center SPM.
- Just as with the original NGA it is not considered executed until both parties have signed.

Slide 18 GrantSolutions Resources

- FMCSA GMO Help Desk: FMCSA_GrantMgmtHelpDesk@dot.gov
 - Contact first for most GrantSolutions questions
- GrantSolutions Help Desk: help@grantsolutions.gov
 - Technical systems operation type of questions or password changes
- Be sure to always copy your Grant Manager.....

Instructor notes:

- There are two places to ask questions regarding GrantSolutions and your Notice of Grant Award (NGA's), these are the FMCSA GMO Help Desk and the GrantSolutions Help Desk.
- The FMCSA GMO Help Desk is for questions such as: "I can't see all of the grants I need to approve, why not?" Or Programmatic or application related questions. This should be your first point of contact in most cases.
- The GrantSolutions Help Desk is for questions such as: "Is GrantSolutions down, I can't seem to get on to view my grants?" For example server error or system down issues.
- If you are unsure of where to go, turn to the GMO Help Desk first and then they can direct you to GrantSolutions, if it is obviously a system hardware issue.

Slide 19 Wrap Up

Instructor notes:
(Transition Slide)

Slide 20 Summary

Now that you have completed this module, you should be able to:

- Understand your key actions in GrantSolutions (GS)

Instructor notes:

(Now that you have completed this section, you should have a basic understanding of:

- How you will receive initial access to GrantSolutions;
- The basic roles for grantees in GrantSolutions;
- How to log into GrantSolutions;
- The view, print and accept or decline functions in GrantSolutions as they pertain to your original and amendment NGAs; and,
- Where to seek help regarding GrantSolutions