Introduction to
GrantSolutions for Grantees
(CDC/ATSDR non-research grantees)

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Slides are available at www.cdc.gov/grants/grantsolutions

Please mute your phone

Agenda

- Introductions

- GrantSolutions for Grantees Overview

- Training & User Accounts

- Communications Resources

- Next Steps

Responsibilities

- CDC, Office of Financial Resources, GrantSolutions Project Management Office
  - Provides support for integration questions
  - Turns on user accounts for initial rollout
  - Communicates to CDC staff and grantees about rollout

- CDC, Office of Financial Resources, Office of Grant Services (OGS)
  - Provides support for policy and process questions
  - Facilitates business process changes to maximize efficiency
  - Maintains user access accounts after initial rollout

- GrantSolutions Center of Excellence (COE)
  - Provides training videos
  - Provides technical support through the help desk
  - Performs system development, enhancements, operations, and maintenance

GrantSolutions

- Is designed for non-research grants management which is the majority of the agency's grant funding

- Retires some of our older, outdated systems and some processes performed via Excel, email, and fax

- Answers long standing requests from grantees for more consistency in our grants processes and transparency in our services

- Provides a centralized system for grantees, program offices, and grants and financial staff

- Standardizes processes across the agency for improved efficiency

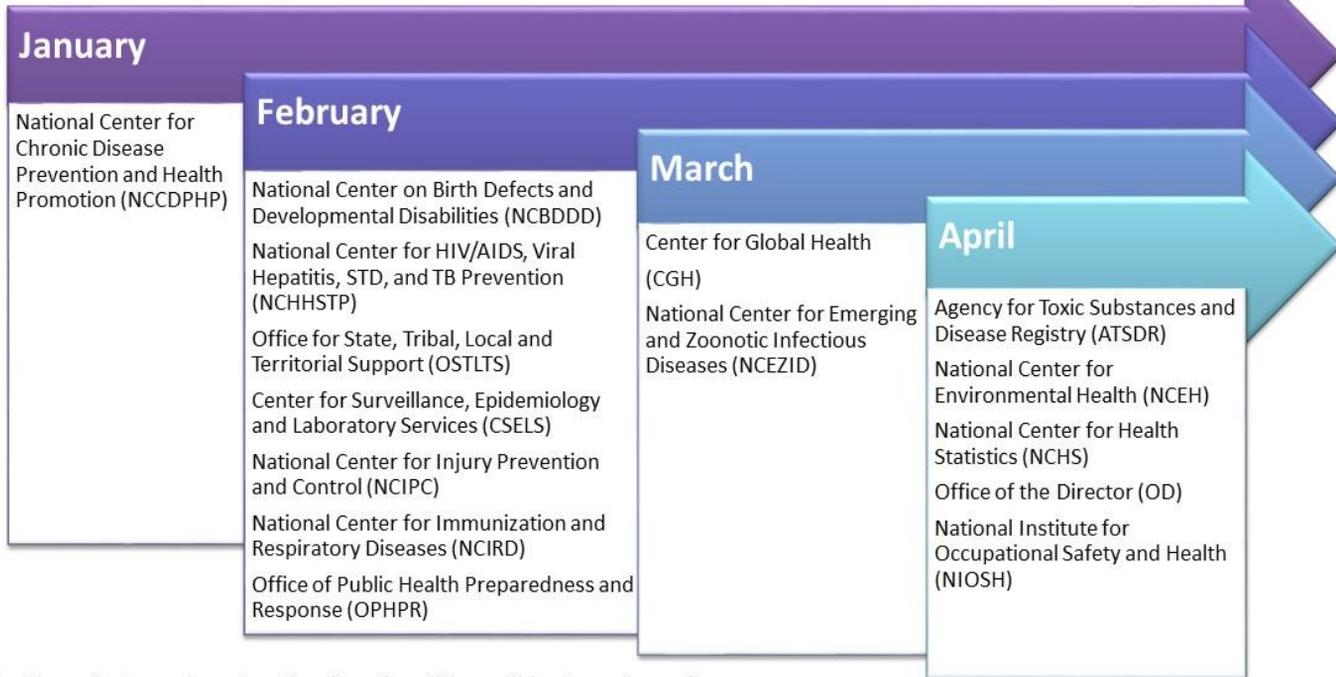- Allows faster notification for grants actions and awards

CDC and GrantSolutions

- CDC staff are using GrantSolutions internally

- Internal transition started in May 2015 and ended in June 2016

- Grantee integration schedule was determined by non-competing continuation due dates

- Functionality access was determined by internal governance group

Non-research Grantee Integration Overview

GrantSolutions Grantee Integration 2017

Phase 1: Non-competing continuations (NCCs) and Federal Financial Reports (FFRs)

January

National Center for Chronic Disease Prevention and Health Promotion (NCCDPHP)

February

National Center on Birth Defects and Developmental Disabilities (NCBDDD)

National Center for HIV/AIDS, Viral Hepatitis, STD, and TB Prevention (NCHHSTP)

Office for State, Tribal, Local and Territorial Support (OSTLTS)

Center for Surveillance, Epidemiology and Laboratory Services (CSELS)

National Center for Injury Prevention and Control (NCIPC)

National Center for Immunization and Respiratory Diseases (NCIRD)

Office of Public Health Preparedness and Response (OPHPR)

March

Center for Global Health (CGH)

National Center for Emerging and Zoonotic Infectious Diseases (NCEZID)

April

Agency for Toxic Substances and Disease Registry (ATSDR)

National Center for Environmental Health (NCEH)

National Center for Health Statistics (NCHS)

Office of the Director (OD)

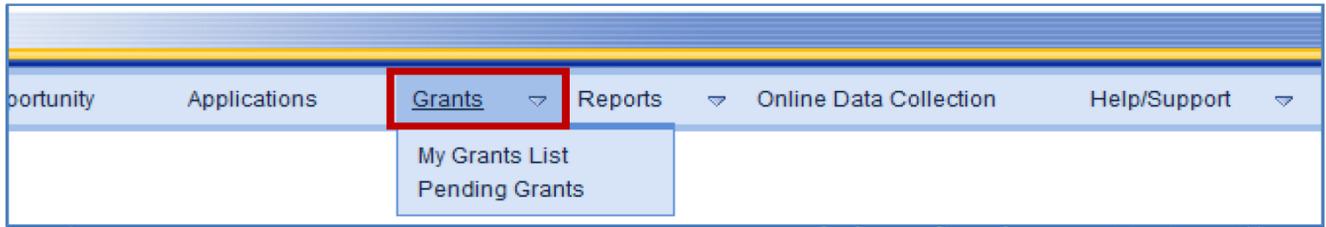National Institute for Occupational Safety and Health (NIOSH)

Phase 2: Amendment action functionalities will be turned on after a successful rollout of NCCs and FFRs to all non-research grantees.

Non-research Grantee Functionalities

- You will do these actions in GMM:
  - Phase 1: Enter non-competing continuation information and Federal Financial Report data (January – April 2017)

  - Phase 2: Submit amendment requests (tentative start in May)

- Actions are simple and forms are familiar

- There is nothing CDC-specific, these are standard GrantSolutions templates and actions used by many other federal agencies

'My Grants List' Screen

Non-competing Continuations

The 'My Grants list' displays the status and apply links if you qualify for a non-competing continuation

Grant Number:	1 HBEIE130131-01-00	View NGA
Grant Program:	State Exchange Planning and Implementation	Grant Notes
Program Office:	OCIIO/OHIE	Send Message
Project Title:	State Exchange Test	History
		Manage Amendments
Award Issue Date: ⑦	06/25/2013	
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	Apply For Non Competing Award
Non Competing Due Date:	08/15/2013	

Non-competing Continuations

NCC applications can be done through GMM

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) ⬅·················· General Information
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	View PDF Version View Original Version	N/A	

Application Kit

The 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		View PDF Version View Original Version	N/A	⊔
Online Forms		Enclosure(s)	Attachment(s)	**Status**
Change Grantee Information		Enter Online	N/A	⊔
Change Project Director		Enter Online	N/A	⊔
SF-424 Application for Federal Assistance Version 2	View Enclosures ·············▶	Enter Online	N/A	⊔
SF-424A Budget Information - Non-Construction		Enter Online	N/A	⊔
SF-424B Assurances - Non-Construction		Enter Online	N/A	⊔
SF-LLL Disclosure of Lobbying Activities	Add Attachments ··············· Enter Online ··········▶		0 Uploaded Files 1 Mail-In Items	⚠
Program Narrative		Enclosure(s)	Attachment(s)	**Status**
CCIIO - Budget Narrative (Upload File)			N/A	⊔
CCIIO - Project Narrative (Upload File)			N/A	⊔
Additional Information to be Submitted		Enclosure(s)	Attachment(s)	**Status**
Cover Letter			N/A	⊔
CCIIO - Miscellaneous Information			N/A	⊔

Federal Financial Reports

Applications	Grants	▽	Reports	▽	Online Data Collection	Help/Support	▽

Federal Financial Report
Financial Status Report

Federal Financial Report

Instructions

1. Federal Agency and Organizational Element to Which Report is Submitted Office of Public Health and Science	2. Federal Grant or Other Identifying Number Assigned by Federal Agency (To report multiple grants, use FFR Attachment)				

3. Recipient Organization (Name and complete address including Zip code) Association of Schools of Public Health, 1900 M ST NW WASHINGTON, DC 20036-3508

4a. DUNS Number	4b. EIN	5. Recipient Account Number or Identifying Number (To report multiple grants, use FFR Attachment)	6. Report Type Quarterly	7. Basis of Accounting ⊙ Cash ○ Accrual

8. Project/Grant Period From: (Month, Day, Year) September 1, 2011	To: (Month, Day, Year) August 31, 2016	9. Reporting Period End Date (Month, Day, Year) March 31, 2013

10. Transactions
(Use lines a-c for single or multiple grant reporting)
Federal Cash (To report multiple grants, also use FFR Attachment):

a. Cash Receipts	$	0
b. Cash Disbursements	$	0
c. Cash on Hand (line a minus b)	$ 0.00	

Grantee Roles

Administrative Official (ADO): required

- Enters and submits the Federal Financial Reports (FFR)

- Initiates, edits, and submits applications/amendments

- Signs the 424 and authorizes organization's commitment

- Access to all grants for the organization

- Can have more than one in each agency, but should be registered with Grants.gov

- The AO listed on the NOA is considered key personnel

- Has the most authority in the system

Grantee Roles

Principal Investigator/ Program Director (PI/PD): required

- Initiates, edits, and submits NCC applications and amendments

- Enters and submits Federal Financial Reports (FFR)

- Adds and views Application and Grant correspondence notes and uploads related files

- Access to grants for which you are the PI/PD

- Can have more than one PI/PD per award, but the PI/PD listed on the NOA is considered key personnel

Grantee Roles

- Views awards

- Enters and submits Federal Financial Reports (FFR)

- Adds and views Application and Grant correspondence notes and uploads related files

- Access to all grants for the organization

- Is typically the organization's business official

- Can have more than one per organization

Benefits to Grantees

- Grant award processes are more transparent
  - Everyone involved in an action can see the status
  - Time and date stamps are on all system actions

- Grantee correspondence can be done in the system and is available for historical purposes

- System is web-based and accessible from anywhere

- Virtual file remains even if turnover occurs

Challenges for Grantees

- Changing business processes can be confusing

- You may use older technology, impacting training

- Some of you may experience a rolling integration as different parts of CDC are scheduled to give access at different times

- If you have research and non-research grants, you will have two different processes

Training and User Accounts

Online Training Videos

Training is online and is based on the actions you will do in the system. Five videos – less than 40 minutes

Two getting started training videos related to post-award actions:
- Introduction to GrantSolutions for Grantees (~10 mins)
- GrantSolutions Post-Award Activities for Grantees (~15 mins)

Three Federal Financial Reports training videos:
- Introduction to Federal Financial Reports for Grantees (~6 mins)
- Modify Submitted Federal Financial Reports for Grantees (~3 mins)
- View the Federal Financial Report for Grantees (~2 mins)

Training and Account Support Materials

- The Center of Excellence's Support page has FAQs

- Inside the Grants Management Module
  - Grantee Guide
  - QuickSheets
    - Federal Financial Report
    - Carryover Amendment
    - Grant Notes –Upload the SF-425

User Accounts

IF	THEN
Your name is listed on the official Notice of Award but you have never used the GrantSolutions Grants Management Module (Authorizing Official and PI/PD)	We will create your account. You will receive 2 automated emails from the GrantSolutions Center of Excellence (COE) when your first CIO* opens access in GMM. One will contain your log in and the other a temporary password. You will automatically receive access to your other CDC grants as the rollout happens but will not receive an additional email from COE. We will communicate with you as each new CIO opens access. You will get an email from us when you receive access to grants from additional CIOs, if you have grants in more than one CIO.

*CIO = Center, Institute, or Office

User Accounts

IF	THEN
Your name is listed on the official Notice of Award <u>and</u> you have an existing account in the GrantSolutions Grants Management Module. You might be using GMM for a grant with another agency. (Authorizing Official and PI/PD)	You will not receive any official notification from the GrantSolutions Center of Excellence. Your CDC grants will automatically appear in your 'My Grants' section within GMM as the CIO rollout happens. We will email you just prior to each cycle to let you know when your grants will be available in the system. You do not have to take any action.

User Accounts

IF	THEN
Your name is not listed on the official Notice of Award but you would like access and <u>do not</u> already have a GMM account	You need to fill out a <u>new user access form</u> and follow the directions in the document. You will receive two automated emails from the GrantSolutions Center of Excellence after the Grants Management Specialist for your grant approves the account. Your access will still follow the <u>integration schedule</u>. This process primarily applies to people who want a Grantee Financial Official role.

User Accounts

IF	THEN
Your name is not listed on the official CDC/ATSDR Notice of Award but you already have a GMM account, perhaps for another federal grant	You need to email the GrantSolutions Help Desk with your grant number(s) and the role you need to have. Your access will still follow the integration schedule. This process primarily applies to people who want a Grantee Financial Official role or an additional PI/PD assigned to a grant.

Requesting Access

- Please do not send in your New Account Form or request access from your grants specialist until your grants are ready to transition - follow the [rollout timeline](#)

- We will communicate with all of the Authorizing Officials and PI/PDs listed in the system ~2 weeks before each cycle to let you know that it's time to look for or ask for access

GrantSolutions Communication Resources

Primary Sources of Information

- **Internet**: GrantSolutions for Grantees is your go-to spot for information, all grantee emails regarding the transition are online

- **GrantSolutions webinars**: these will be made available on the webpage if you need to refer back, or direct a fellow grantee to the video

- **Emails**: CDC will send periodic emails with information and resources before, during, and after integration. Reach out directly to your project officer or grants management specialist for programmatic or policy questions

Getting Help

Issue	Contact	Example
Technical	GrantSolutions Help Desk help@grantsolutions.gov 1-866-577-0771 8:00AM to 6:00PM EST Monday – Friday	• Forgotten password • Log in error • Cannot see a grant
Programmatic or Policy	Your project officer or grants management specialist. Their names are on the Notice of Award.	• Submission deadlines • Non-competing continuation (NCC) content • Federal Financial Report (FFR) content
Integration	CDC's GrantSolutions Office: grantsolutionsinfo@cdc.gov	• Schedule • Who will get an account • Roles in the system

Next Steps

Next Steps

- Watch the [training videos](#)

- Request a user account, if required for your role. Follow the [rollout timeline](#)

- Look for GrantSolutions emails

- Read more on www.cdc.gov/grants/grantsolutions
  - All previous grantee communications are posted

Question and Answer Time

grantsolutionsinfo@cdc.gov

For more information, contact CDC
1-800-CDC-INFO (232-4636)
TTY: 1-888-232-6348   www.cdc.gov

The findings and conclusions in this report are those of the authors and do not necessarily
represent the official position of the Centers for Disease Control and Prevention.