Welcome to Grants.gov Training!

We appreciate your participation as a representative of your agency. We know you have an important task in front of you as you help spread the word and teach others about Grants.gov. We are here to help.

We are counting on you to spread the word and help others get up to speed on this efficient, customer-centric way of finding, applying for and managing grants. We're here to help.

Let's see what we can accomplish together!

Welcome!!

Goals of This Course

- ◎ Introduce Grants.gov.
- ◎ Practice using various functions of Grants.gov.
- ◎ Understand the user support tools available and how to use each.

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Introduction

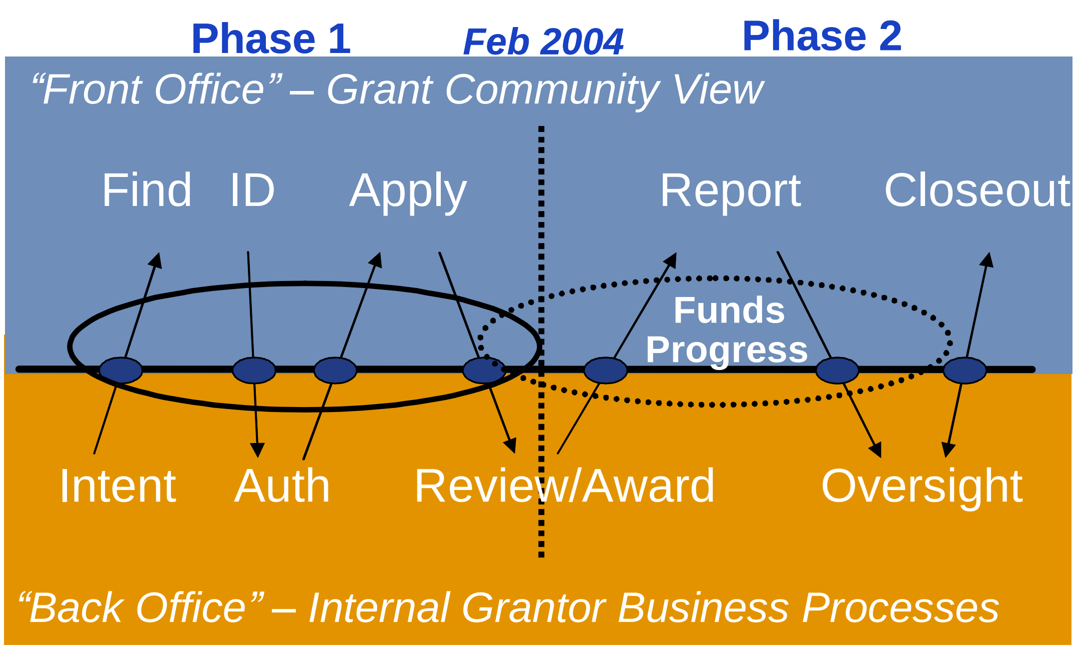
Module 1
Overview of Grants.gov

Topic 1: Background

The Background of Grants.gov includes:

- eGovernment named as one of five government-wide imperatives included in the President's Management Agenda.
- 24 high priority 'Quicksilver' programs named by OMB.
- Focus on delivering significant productivity and performance gains across Federal Government (rather than for just an individual agency).
- Grants.gov identified as a Quicksilver initiative, with HHS named as 'managing partner'.
- 26 participating Federal grant-making agencies.
- 900 grant programs.
- $350B in grants awarded annually.

The Grants.gov is focused primarily on the Grant Community "front office" view and is being implemented in two phases:



Topic 2: Vision

The Grants.gov will:

- Produce a simple, unified “storefront” for all customers of Federal grants to electronically find opportunities, apply, and manage grants.
- Facilitate the quality, coordination, effectiveness, and efficiency of operations for grant makers and grant recipients.

Topic 3: Goals

The goals of Grants.gov are to:

- Eliminate the burden of redundant or disparate electronic and paper-based data collection requirements.
- Define and implement simplified standard processes and standard data definitions for federal grant customer interactions.
- Protect the confidentiality, availability, and integrity of data.
- Standardize the collection of financial and progress report data in support of audit and performance measurement activities.

Topic 4: Grantor Agency Benefits

Grants.gov is a benefit to Grantor agencies because it:

- Unifies the "face" of Agency grant opportunity announcements.
- Allows agencies to continue with existing business processes while being compatible with the Grants.gov services.
- Avoids cost of having to build separate agency-specific grant application systems.
- Provides agencies opportunity to use more off-the-shelf grant management software as legacy systems get replaced.
- Provides opportunities for consolidation and use of best practices within agencies.

Topic 5: Grant Community Benefits

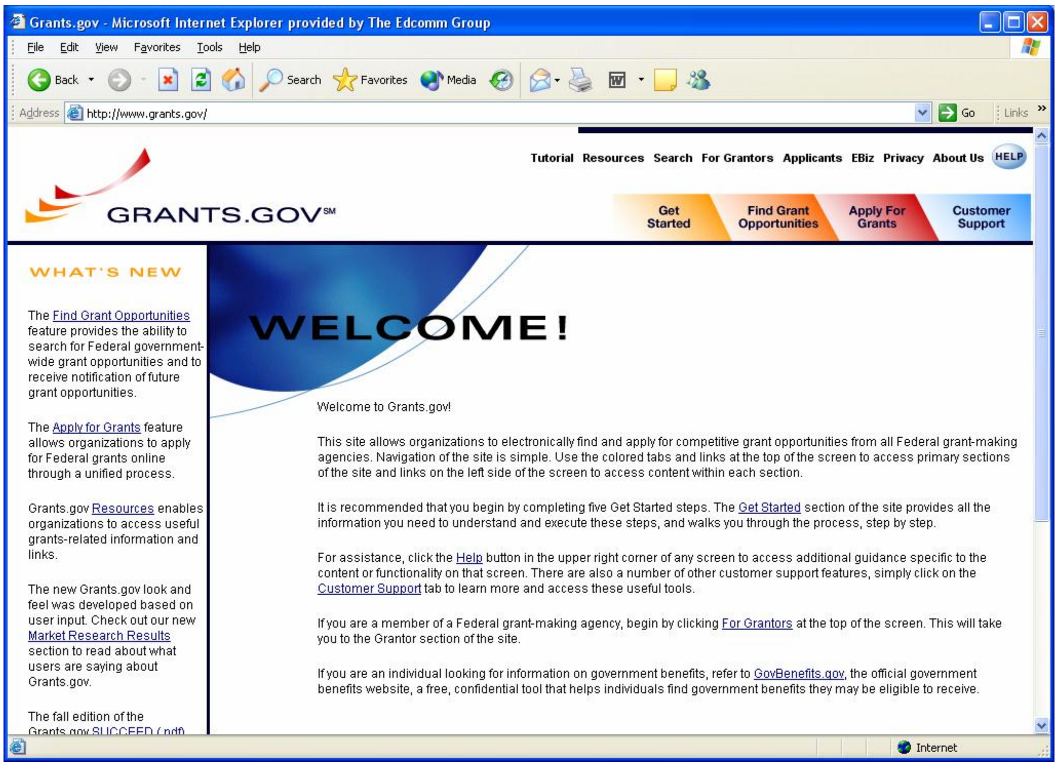
Grants.gov is a benefit to Grant Community members because it:

- Provides a single source to find Federal government-wide competitive grant opportunities
- Teaches about available opportunities in a standardized manner, saving time and money
- Provides a secure and reliable source for applying for Federal grants
- Simplifies the grant application process
- Reduces paperwork
- Prevents the need to learn multiple agency or program-specific application processes/systems

Module 2
Grants.gov Walkthrough

Topic 1: System Overview

- Look and Feel
- Workflow-based Navigation
- Security
- Ease of Use

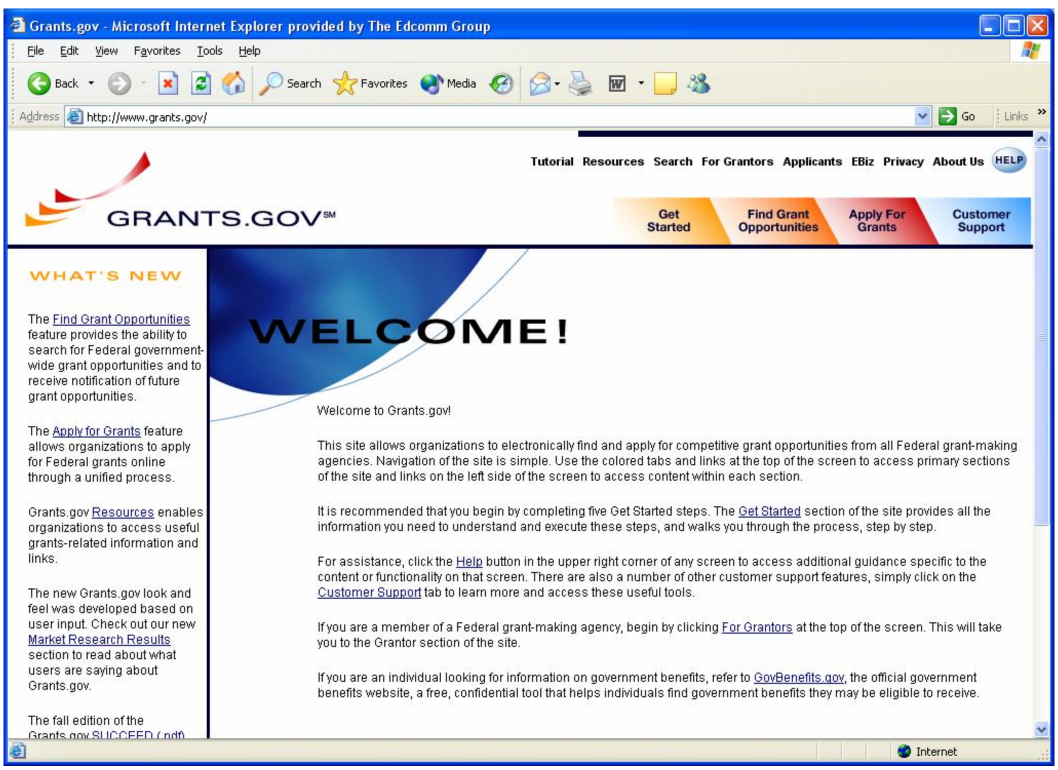


Topic 2: Grant Community

- Get Started
  - Find a grant opportunity for which you want to apply.
  - Download the grant application package and instructions.
  - Register with Central Contractor Registry.
  - Register with Credential Provider.
  - Register with Grants.gov.
  - Log on to Grants.gov.

- Find Grant Opportunities
  - Searching Grant Synopses
  - Receiving Grant Notifications

- Apply for Grants
  - Downloading Application Packages
  - Completing Application Packages
  - Submitting Application Packages

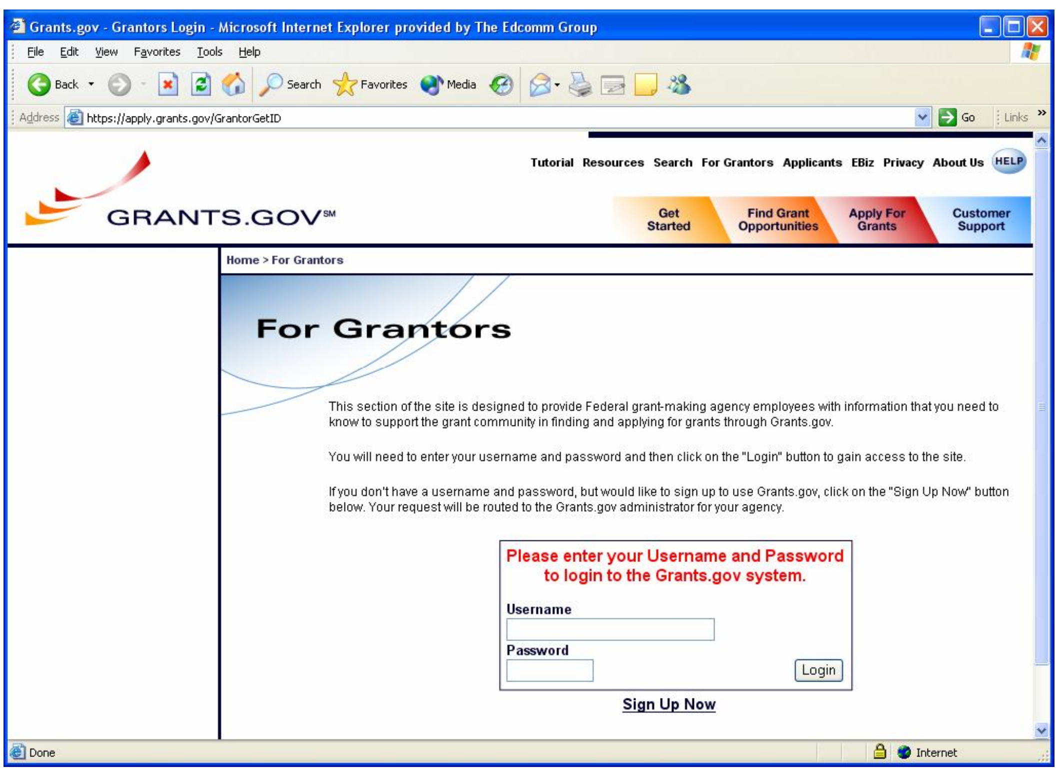


Topic 3: For Grantors

- Manage Agencies
  - Creating Agencies
  - Modifying Agencies
  - Deleting Agencies
  - Setting Agency Levels

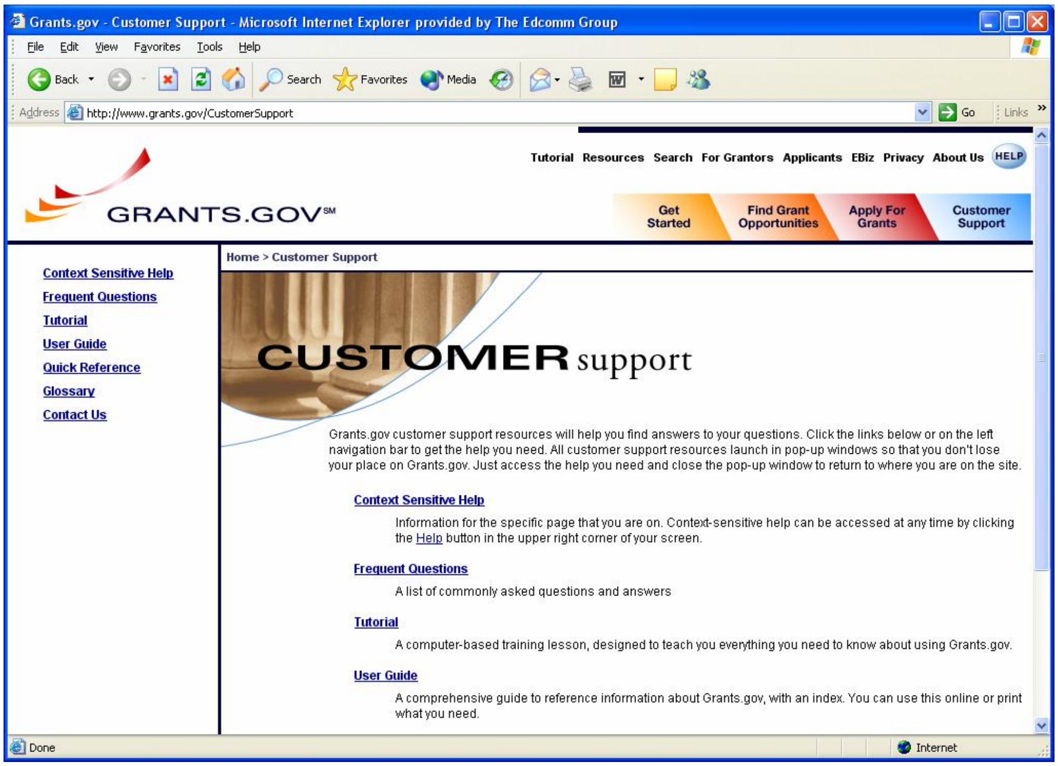
- Manage Users
  - Creating Users
  - Modifying Users
  - Reassigning User Roles
  - Deleting Users

- Work with Application Packages
  - Publishing Application Packages (Create, Modify and Delete)
  - Managing Application Package Templates (Create, Modify and Delete)
  - Retrieving Submitted Application Packages
  - Assigning Agency Tracking Numbers
  - Viewing Applications



Topic 4: Customer Support

- Context-Sensitive Help
- Frequent Questions
- Tutorial
- User Guide
- Quick Reference
- Glossary
- Contact Us



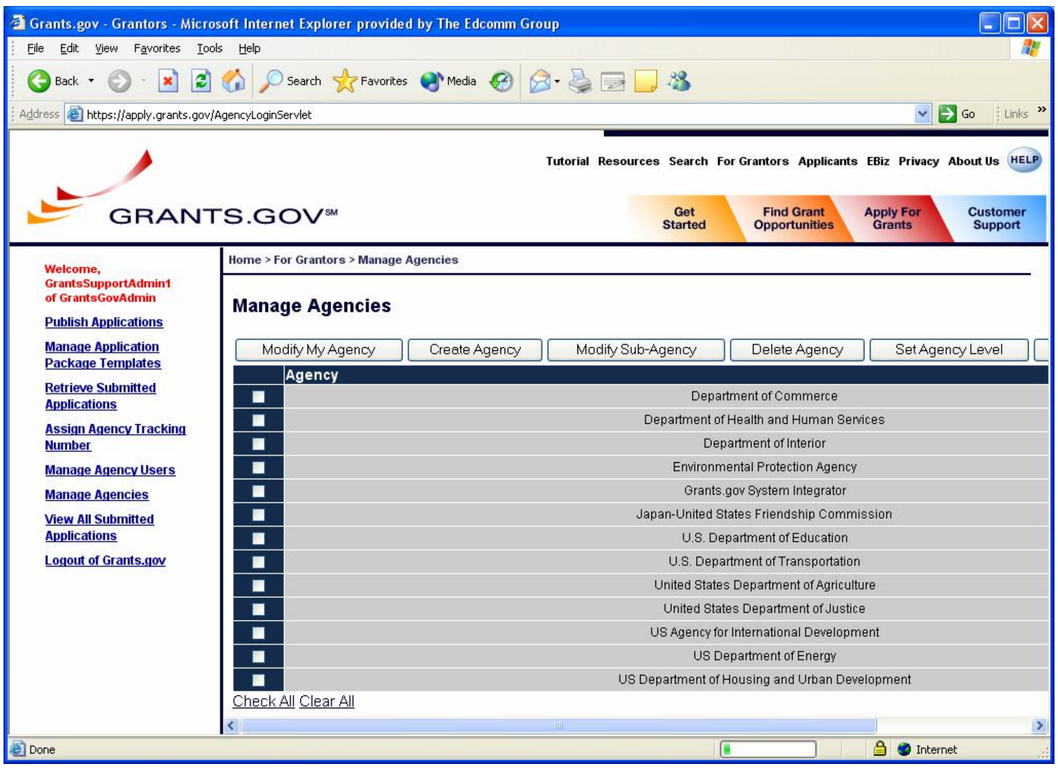
The Apply For Grants Process

Module 1
The Grantor Process

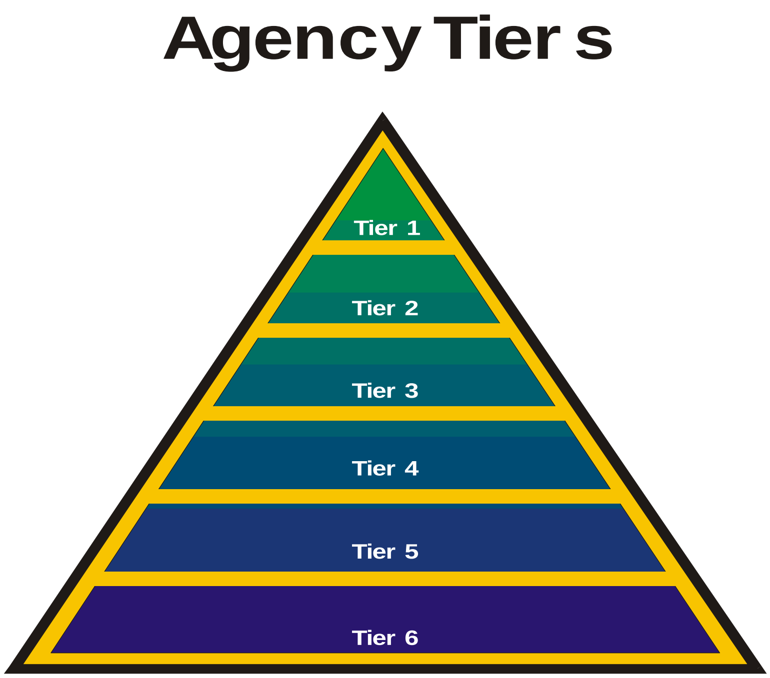
Topic 1: Manage Agencies

Managing Agencies enables you to create and modify agency profiles, manage users registered with your agency or sub-agencies, delete agencies and set agency levels.

- Create Agencies
- Modify Agencies
- Modify Sub-Agencies
- Delete Agencies
- Set Agency Levels
- Manage Sub-Agency Users

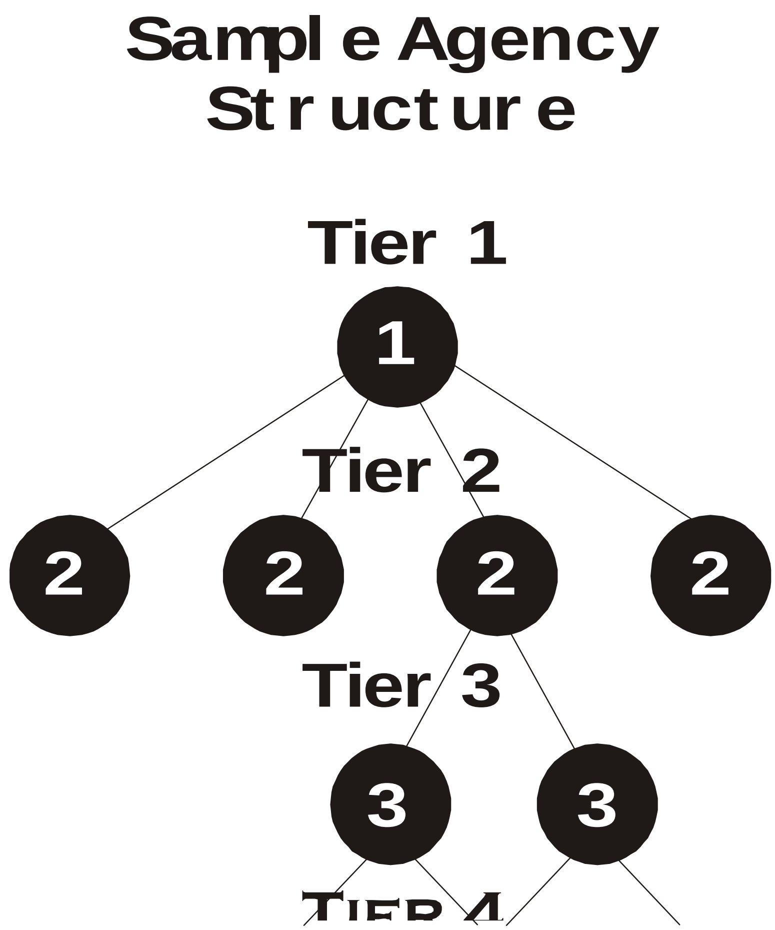


Agency Tiers



The Grants.gov tiers are linear in that the Tier 1 agency is referred to as the "parent agency". Tiers 2-6 are "sub-agencies" within the "parent agency".

"Agencies" and "Sub-Agencies"



The above graphic is a sample of how the agency and sub-agency structure might look. You may have numerous sub-agencies registered with the parent agency.

How Agency Enrollment Codes Work

When you sign up as a new user, you are required to enter an Agency Enrollment Code. This code designates to which agency you are assigned. The Agency Enrollment Code is created from the Agency Code entered when creating an agency. The code combines the Agency Codes of your agency and those of your "parent" agencies, separating them by hyphens.

For example, if Tier 1's agency code is T1, Tier 2's agency code is T2, Tier 3's agency code is T3, etc… and you wanted to register with the Tier 3 "sub-agency", your Agency Enrollment Code would be T1-T2-T3

What You Can See When You Login

When you login to the "For Grantors" section of the site, you are logging into a specific agency in a specific tier.

You will be able to view the following (depending on your assigned roles):

- The application packages created by the current agency you are logged into
- The application package templates created by the current agency you are logged into
- The applications packages which your agency created that have been downloaded, completed and submitted by grant applicants. You will be able to retrieve and assign agency tracking numbers to these applications.
- The users registered with your agency and the agencies which are one tier below your agency.*

  *To view the users of the agencies registered one tier below your agency, you will need to first select the agency from the Manage Agencies screen and then click the Manage Users button. These users will not appear on the Manage Agency Users screen if you simply click the link on the left of your screen.
- The agencies which are registered one tier directly below your agency.

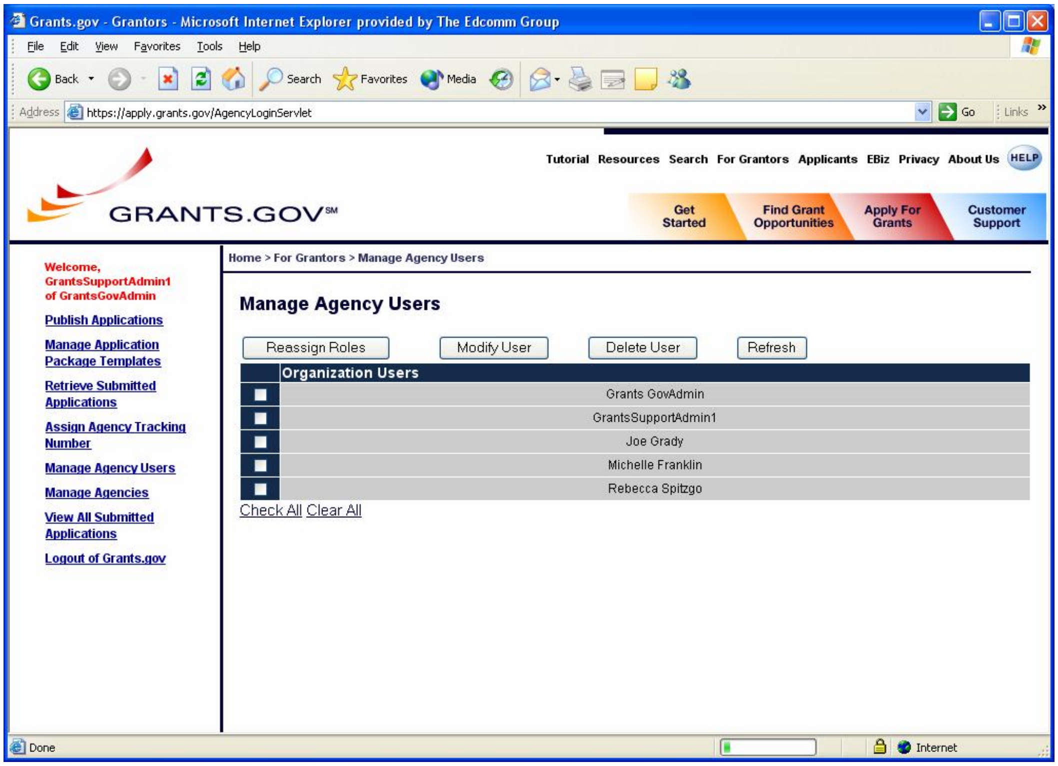
For example, a user registered with a Tier 2 Agency, will be able to see:

- All the application packages and package templates that his/her Tier 2 Agency created
- All the applications packages that his/her Tier 2 Agency created which have been downloaded, completed and submitted by grant applicants
- The users registered with his/her Tier 2 Agency
- The users registered with the Tier 3 agencies that are directly below his/her Tier 2 Agency.
- The Tier 3 agencies that are registered directly below his/her Tier 2 Agency.

Topic 2: Manage Users and Roles

Managing Agency Users enables you to modify and delete agency users as well as reassign agency user roles.

- Create Users
- Modify Users
- Reassign User Roles
- Delete Users



Role Definitions

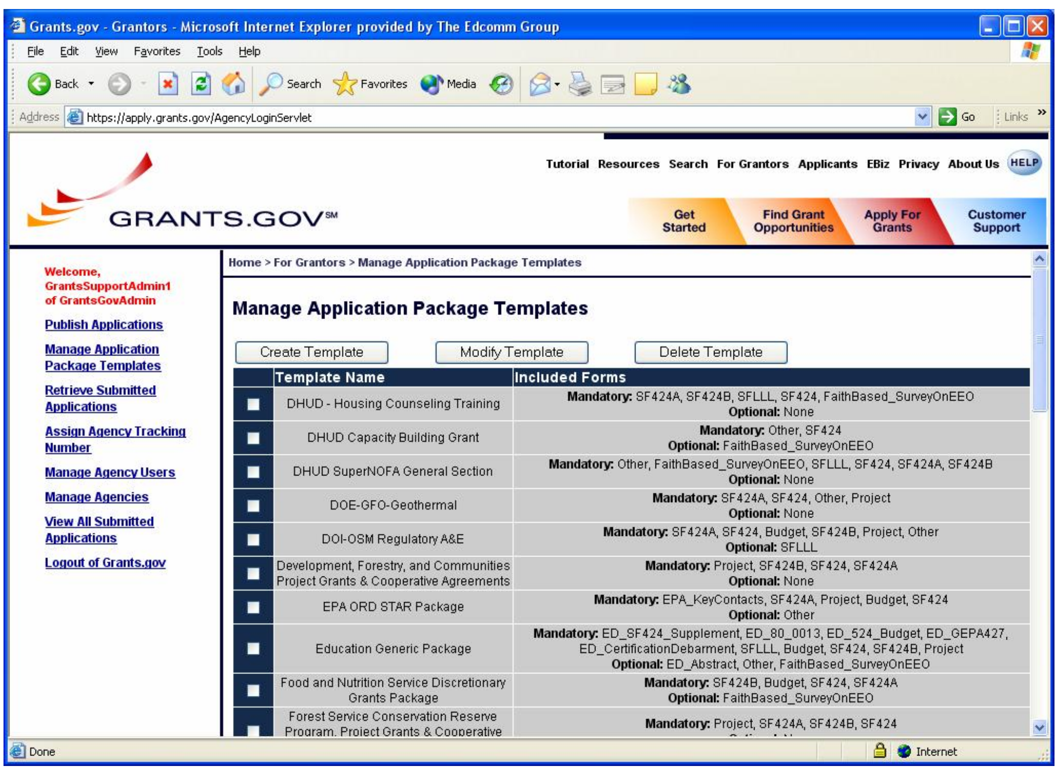
- A **Role Manager** is the person who is set as the agency point of contact on the Agency Profile screen.
- A **Super User** is someone who is assigned all user roles.
- The **Agency Grant Creator** role allows a user to publish application packages.
- The **Agency Grant Retriever** role allows a user to retrieve applications that were submitted to your agency.
- The **Agency Tracking Number Assigner** role allows a user to assign tracking numbers to submitted applications.
- The **Agency Template Creator** role allows a user to manage application package templates.
- The **Manage Agencies** role allows a user to manage agencies.
- The **View Applications** role allows a user to view the applications submitted to your agency.

Topic 3: Manage Application Package Templates

Managing Application Package Templates enables you to create, edit and delete application package templates that can be reused for multiple opportunity-specific application packages. Once a template is created, you can then add instructions specific to a particular funding opportunity and publish the application package to Grants.gov through the Publish Application Packages section.

Creating, modifying and deleting application package templates has no effect on application packages already published on Grants.gov.

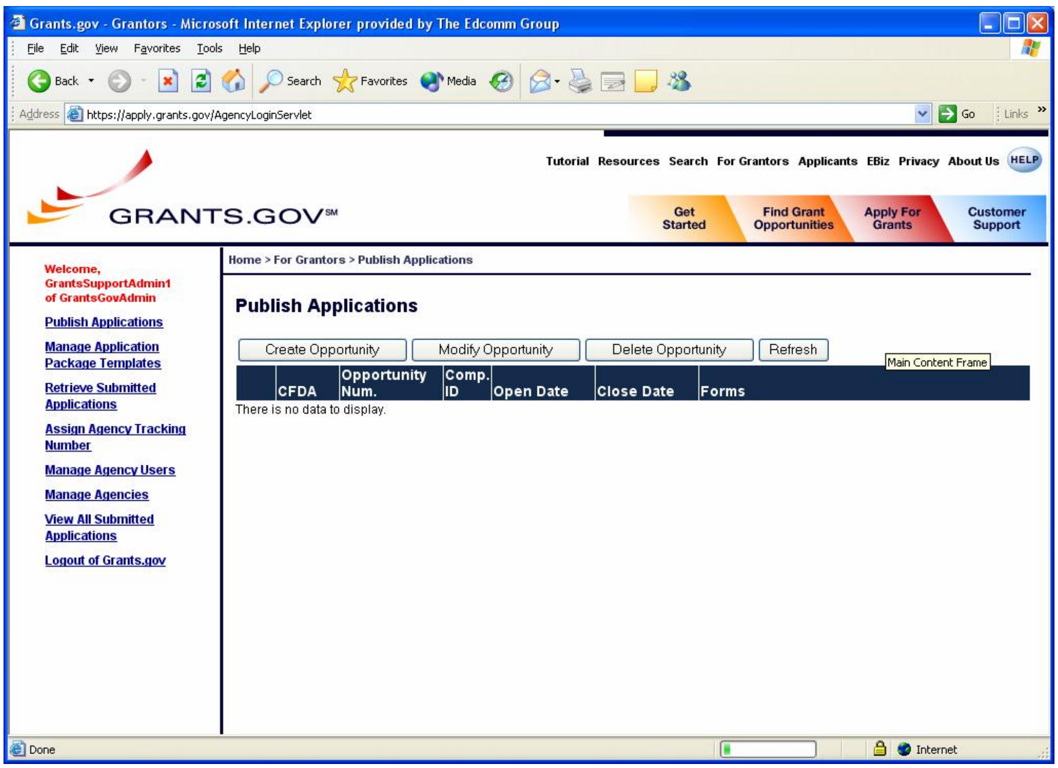
- Create Application Package Templates
- Modify Application Package Templates
- Delete Application Package Templates



Topic 4: Publish Application Packages

Publishing Application Packages enables you to create, modify and delete application packages published on Grants.gov. In publishing an application package, you will utilize the templates created in the Manage Application Package Templates section. As part of this, you will also be able to add instructions specific to each opportunity and review your compiled application package before publishing it to Grants.gov for public view.

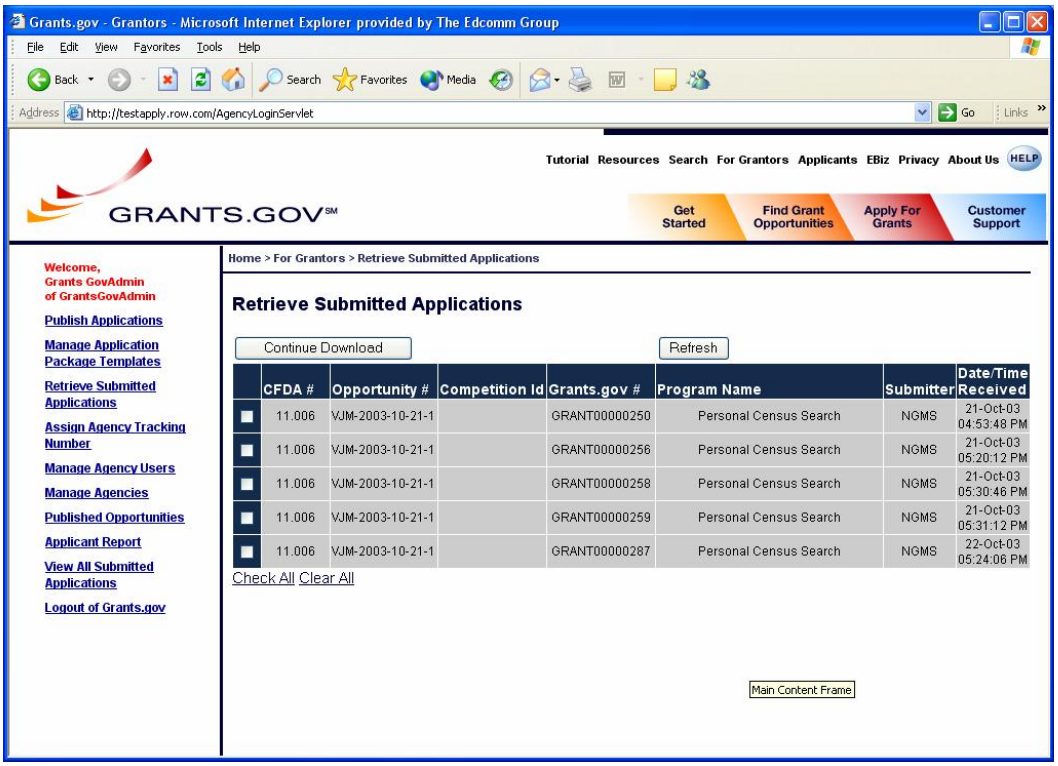
- Create Application Packages
- Modify Application Packages
- Delete Application Packages



Topic 5: Retrieve Applications

Retrieving Submitted Applications enables you to download an application and its contents that has been submitted to your agency.

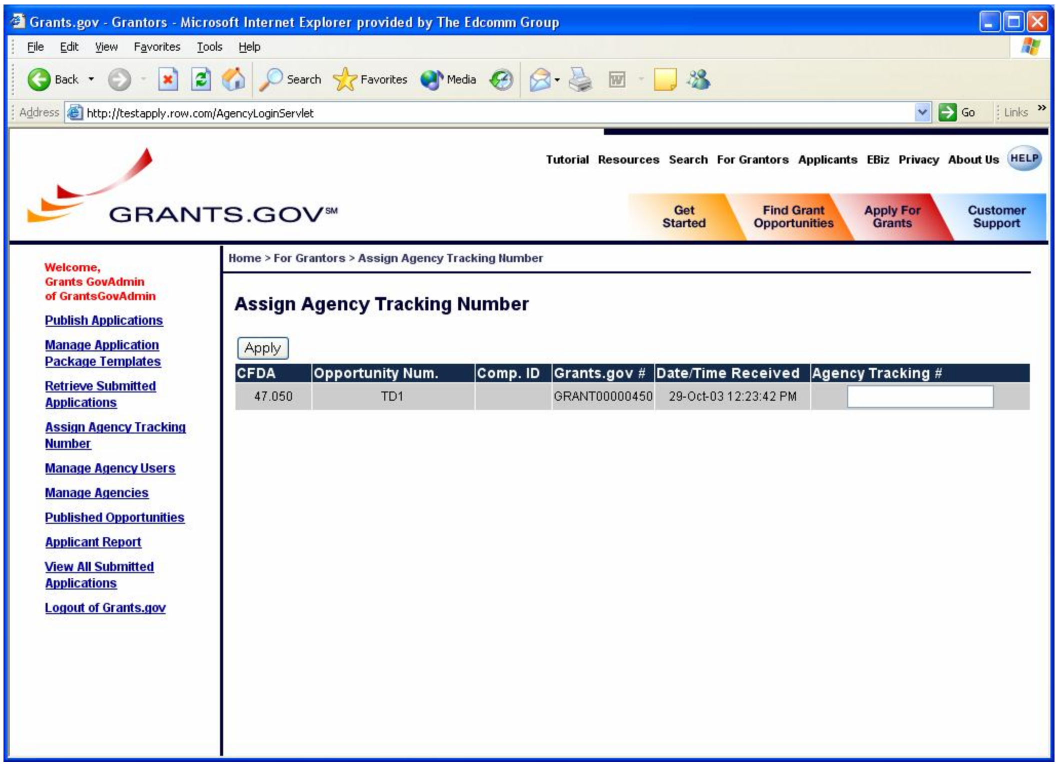
- Retrieve Submitted Applications



Topic 6: Assign Tracking Numbers

Assigning Agency Tracking Numbers enables you to assign agency specific tracking numbers that can be used internally to track submitted applications. This functionality is optional.

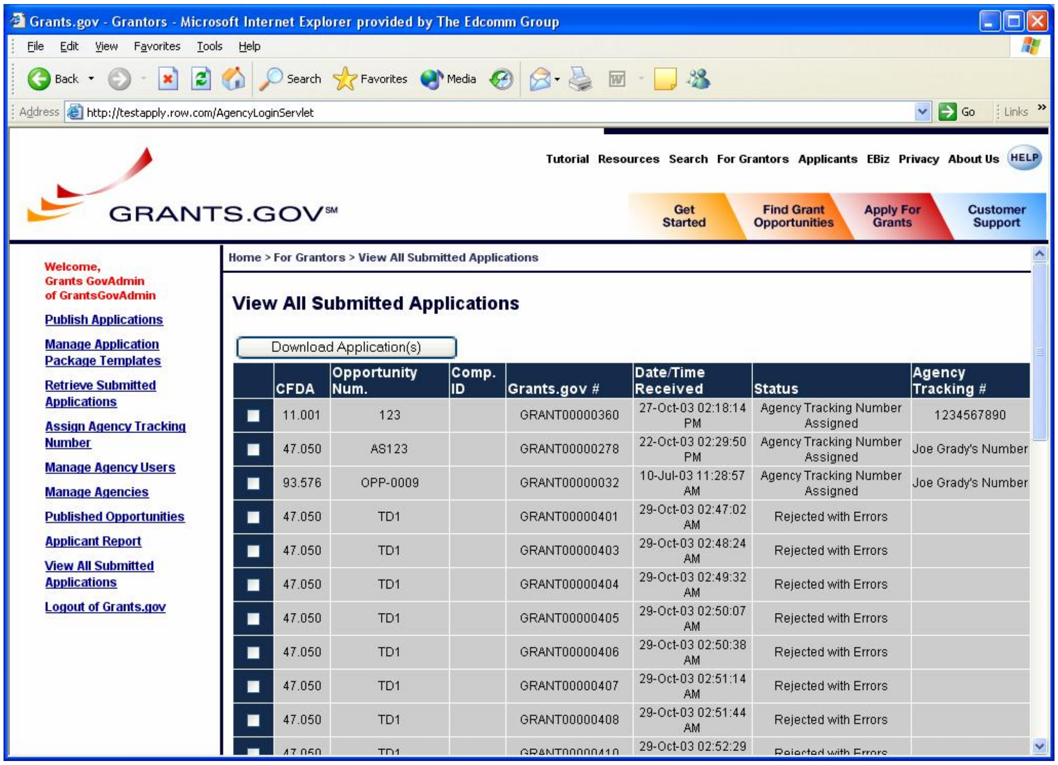
- Assign Agency Tracking Numbers



Topic 7: View Applications

Viewing Applications enables you to view all applications submitted to your agency and their status as well as re-retrieve submitted applications.

- View Applications



Summary: Grantor Process

In summary, as Grantors we:

- Manage agencies
- Manage users and roles
- View applications
- Manage application package templates
- Publish application packages
- Retrieve applications
- Assign tracking numbers
- View Applications

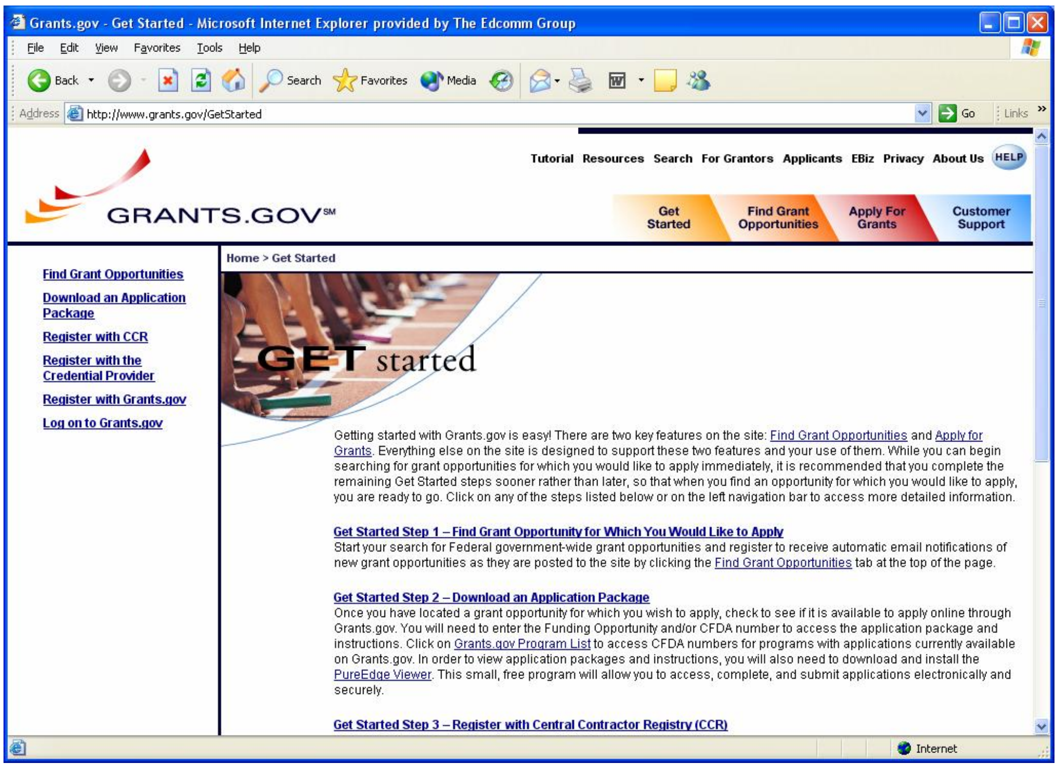
Module 2
The Grant Community Process

Topic 1: Get Started

If an applicant wants to find and apply for Federal grants, they must first complete these 6 Get Started steps. Get Started steps only need to be completed once.

- Find a grant opportunity for which you want to apply.
- Download the grant application package and instructions.
- Register with Central Contractor Registry.*
- Register with Credential Provider.*
- Register with Grants.gov.*
- Log on to Grants.gov.*

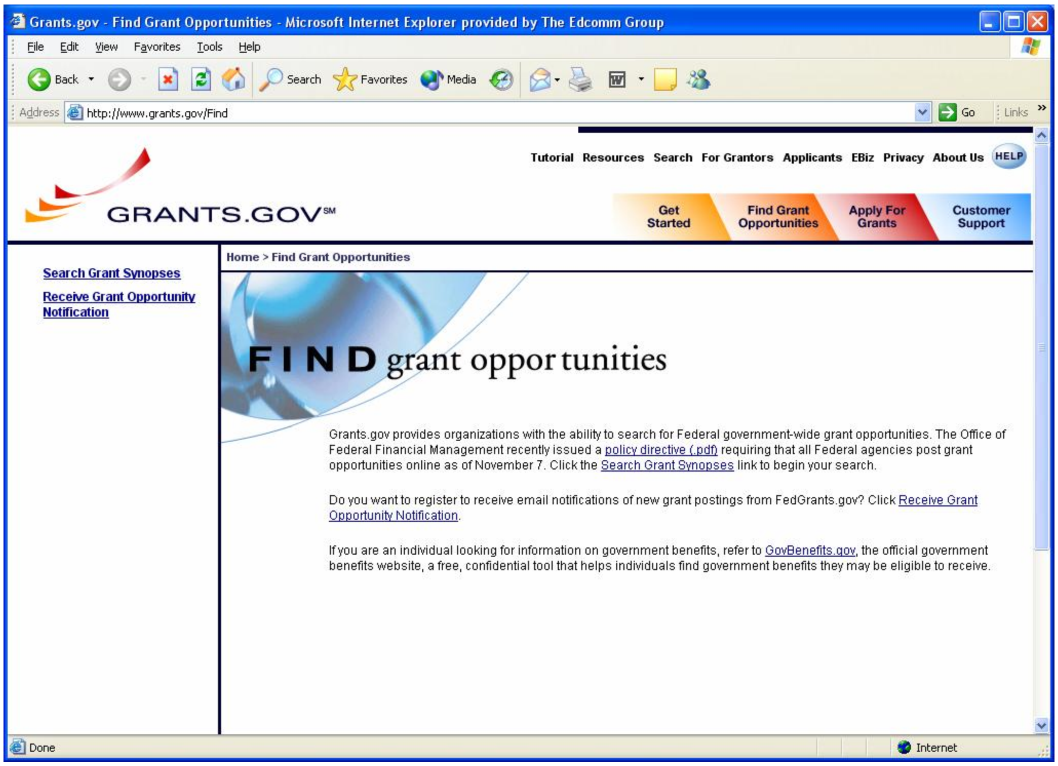
*These steps do not need to be completed if the applicant will not be applying for the grant through Grants.gov.



Topic 2: Find Grant Opportunities

Any applicant can use Grants.gov to search for grants as well as to sign up to receive grant opportunity notifications:

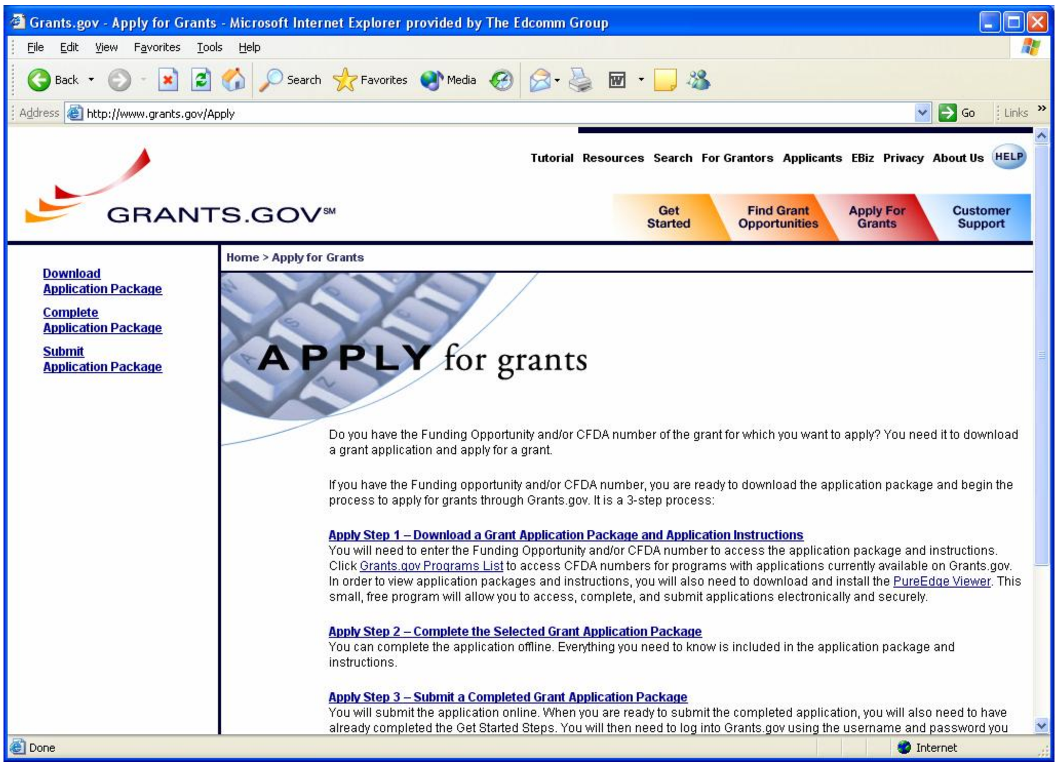
- Search Grant Synopses
- Receive Grant Opportunity Notification



Topic 3: Apply for Grants

Once an applicant finds a grant for which they want to apply, they can download the application and its instructions, complete the application and submit it on Grants.gov.

- Download Application Packages
- Complete Application Packages
- Submit Application Packages



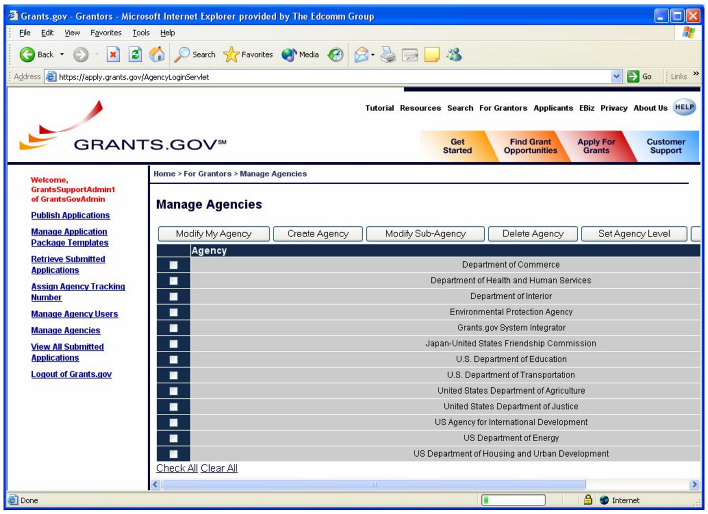
Module 3
Practice Exercises

Practice 1: Modify Your Agency

To modify your agency profile, click the **Manage Agencies** link on the left of your screen.

This will take you to the **Manage Agencies** screen.

Manage Agencies screen

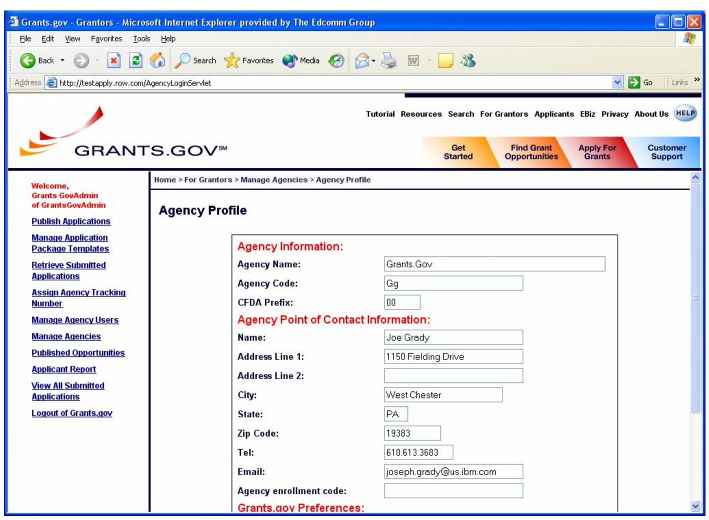


This screen displays the registered agencies that you represent.

Click the **Modify My Agency** button above the listed agencies.

This will take you to the **Agency Profile** screen for the agency with which you are registered.

Agency Profile screen

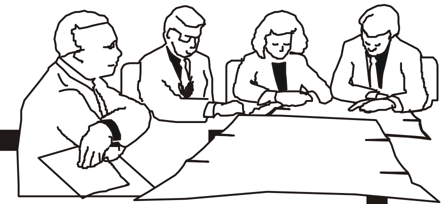


Make any necessary revisions.

If you do not want to save the changes you made to your agency profile, click the **Cancel** button at the bottom of the screen. You will be returned to the **Manage Agencies** screen and the changes will not be saved.

OR

If you want to save the changes you made to your agency profile, click the **Submit** button at the bottom of the screen to save the changes. You will be returned to the **Manage Agencies** screen and the changes will be saved.



Key Points

- **Use "Modify My Agency" to change your agency profile.**
- **Click "Submit" to save your changes.**
- **Utilize customer support resources.**

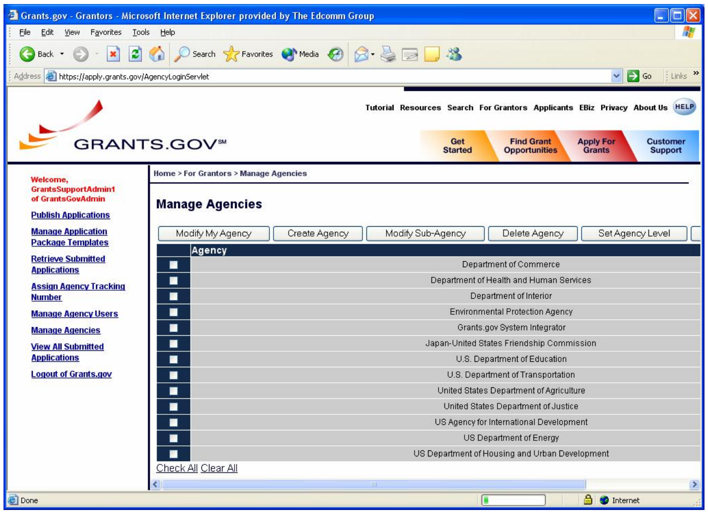
My Notes

Practice 2: Create a Sub-Agency

To create a new agency, click the **Manage Agencies** link on the left of your screen.

This will take you to the **Manage Agencies** screen.

Manage Agencies screen

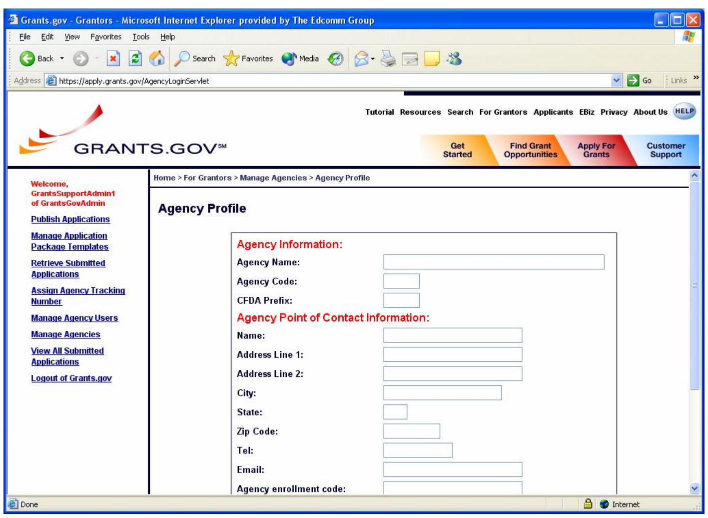


This screen displays the registered agencies that you represent.

Click the **Create Agency** button above the listed agencies.

This will take you to the **Agency Profile** screen.

Agency Profile screen



Enter the agency's name in the **Agency Name** field. You only need to enter the name for the specific agency that you are registering.

Enter a code for the agency in the **Agency Code** field. This is typically the agency's acronym and should be unique.

Enter the agency's CFDA prefix in the **CFDA Prefix** field.

Enter a point of contact name for the agency in the **Name** field.

Enter the street address at which the agency contact works in the **Address** field.

Enter the city in which the agency contact works in the **City** field.

Enter the state in which the agency contact works in the **State** field.

Enter the zip code in which the agency contact works in the **Zip Code** field.

Enter the business phone number for the agency contact in the **Tel** field.

Enter the business email address for the agency contact in the **Email** field.

You do **NOT** need to enter anything in the **Agency Enrollment Code** field. The system will automatically generate this code. This code will be required when signing up new users for the agency.

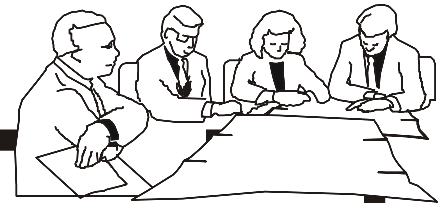
Select the format for which applications will be able to be downloaded by clicking the arrow next to the **Application Download Format** drop down box.

Select the e-mail notification to the agency's super-user by clicking the arrow next to the **E-Mail Notification to Super-User** drop down box.

If you do not want to save the new agency, click the **Cancel** button. You will be returned to the **Manage Agencies** screen where the new agency will not appear.

OR

If you want to save the new agency, click the **Submit** button. You will be returned to the **Manage Agencies** screen where the new agency will be listed.



Key Points

- **The Agency Code is unique to your agency.**
- **Do NOT enter the Agency Enrollment Code.**
- **Users need the Agency Enrollment Code to enroll.**

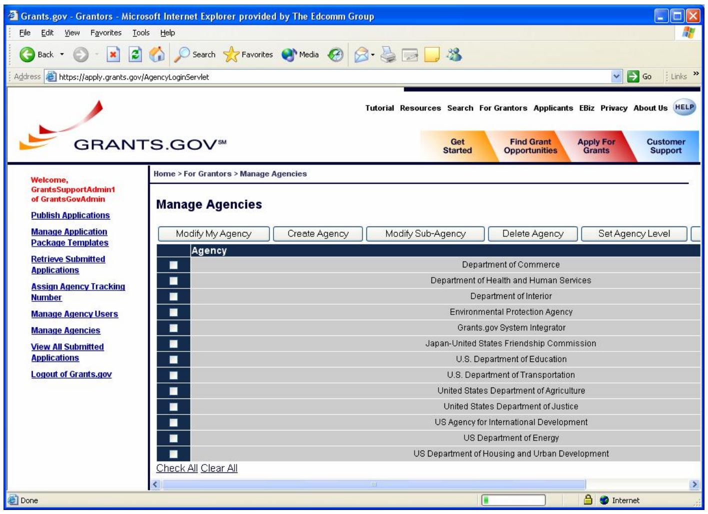
My Notes

Practice 3: Modify a Sub-Agency

To modify a sub-agency that is registered for your agency, click the **Manage Agencies** link on the left of your screen.

This will take you to the **Manage Agencies** screen.

Manage Agencies screen



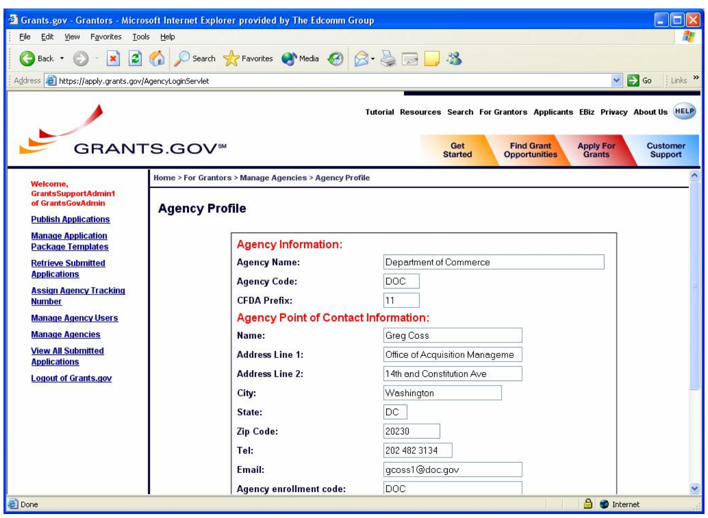
This screen displays the registered agencies that you represent.

Select the sub-agency profile that you want to modify by clicking in the checkbox in the first column of that sub-agency's row.

Click the **Modify Agency** button above the listed agencies.

This will take you to the **Agency Profile** screen.

Agency Profile screen

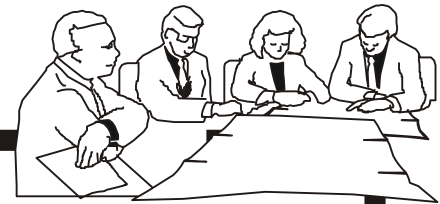


Make any necessary revisions.

If you do not want to save the changes you made to the sub-agency profile, click the **Cancel** button at the bottom of the screen. You will be returned to the **Manage Agency Users** screen and the changes will not be saved.

OR

If you want to save the changes you made to the sub-agency profile, click the **Submit** button at the bottom of the screen to save the changes. You will be returned to the **Manage Agency Users** screen and the changes will be saved.



Key Points

- **Check the agency you want to modify.**
- **Click "Submit" to save your changes.**
- **Utilize customer support resources.**

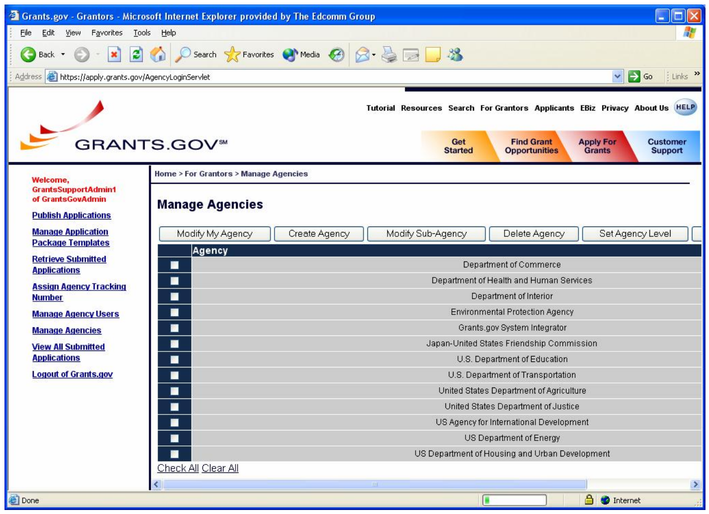
My Notes

Practice 4: Delete an Agency

To delete an agency, click the **Manage Agencies** link on the left of your screen.

This will take you to the **Manage Agencies** screen.

Manage Agencies screen



This screen displays the registered agencies that you represent.

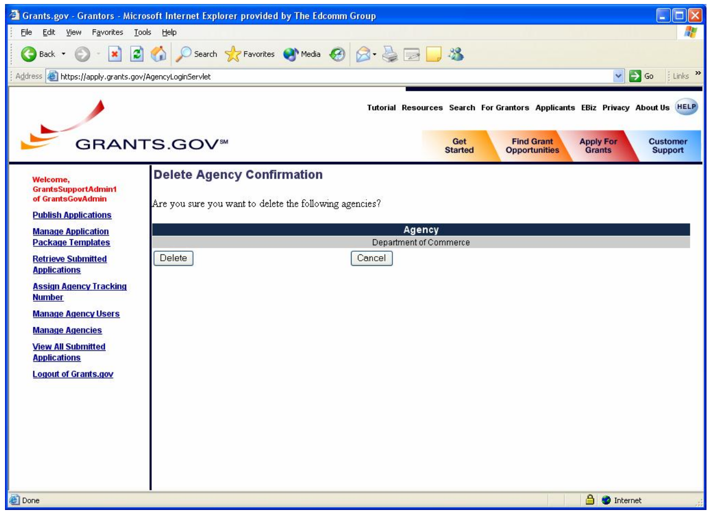
Select the agency profile(s) that you want to delete by clicking in the checkbox in the first column of that agency's row. You can select more than one agency to delete at a time.

> To select all of the agencies, click the **Check All** link at the bottom of the agency list. To de-select all of the agencies, click the **Clear All** link at the bottom of the agency list.

Click the **Delete Agency** button above the listed agencies.

This will take you to the **Delete Agency Confirmation** screen.

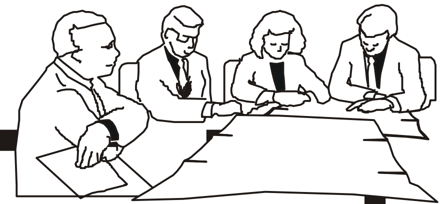
Delete Agency Confirmation screen



Click the **Cancel** button to return to the previous screen without deleting the listed agencies.

OR

Click the **Delete** button to permanently remove the listed agencies. You will be returned to the **Manage Agencies** screen where you will need to click the **Refresh** button to update the **Manage Agencies** screen so that the agencies you deleted no longer appear.



Key Points

- **You can delete more than one agency at a time.**
- **Refresh the "Manage Agencies" screen to view deletions.**
- **Utilize customer support resources.**

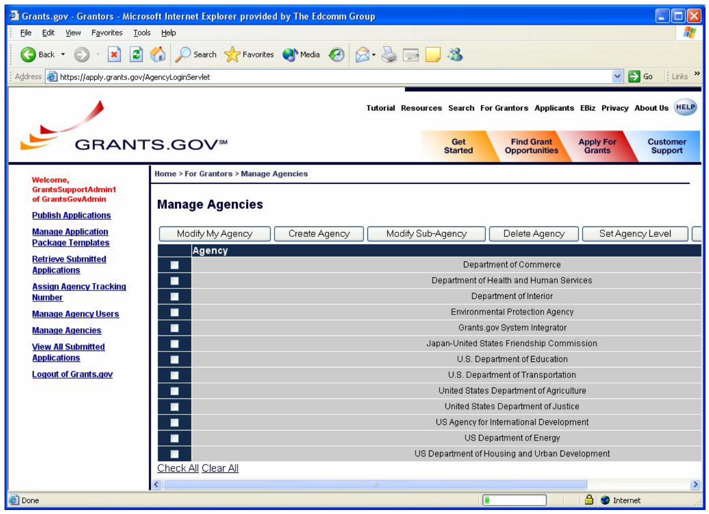
My Notes

Practice 5: Set Agency Levels

To set a new agency level, click the **Manage Agencies** link on the left of your screen.

This will take you to the **Manage Agencies** screen.

Manage Agencies screen

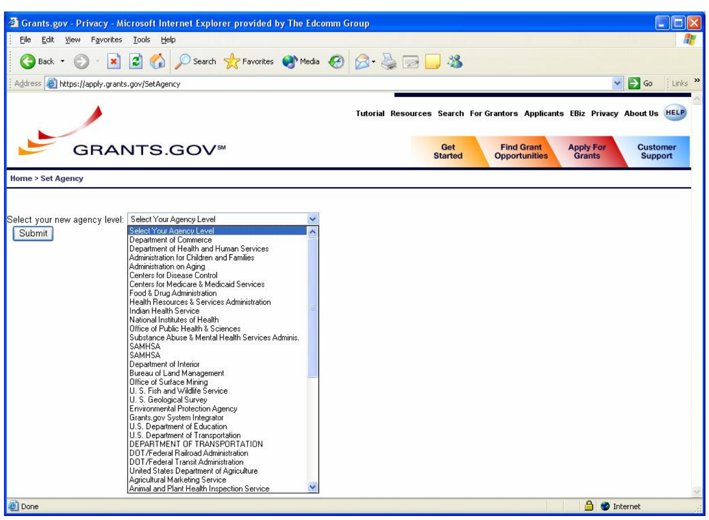


This screen displays the registered agencies that you represent.

Click the **Set Agency Level** button above the listed agencies.

This will take you to the **Set Agency Level** screen.

Set Agency Level screen

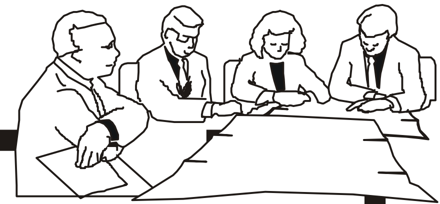


Select the agency for which you want to be assigned from the **Select Your New Agency Level** drop down box.

If you do not want to save your new agency level, click the **Cancel** button. You will be returned to the **Manage Agencies** screen and the changes will not be saved.

OR

If you want to save your new agency level, click the **Submit** button. You will be returned to the **Manage Agencies** screen and your new agency level will be set.



Key Points

- **You can change the agency to which you are set.**
- **Remember to change your level back to what you need.**
- **Utilize customer support resources.**

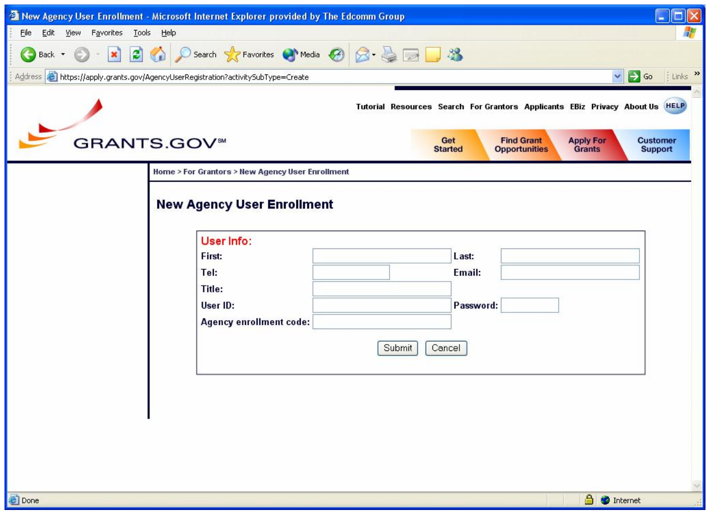
My Notes

Practice 6: Sign Up

To sign up as a new user, click the **Sign Up Now** link under the login box.

This will take you to the **New Agency User Enrollment** screen.

New Agency User Enrollment screen



Enter your first name in the **First** field.

Enter your last name in the **Last** field.

Enter your business telephone number in the **Tel** field.

Enter your business email address in the **Email** field.

Enter your title in the **Title** field.

Choose a user name and enter it in the **User ID** field. Your user name can include any combination of letters and numbers up to 10 characters long.

Choose a password and enter a password in the **Password** field. Your password can include any combination of letters and numbers up to 10 characters long.

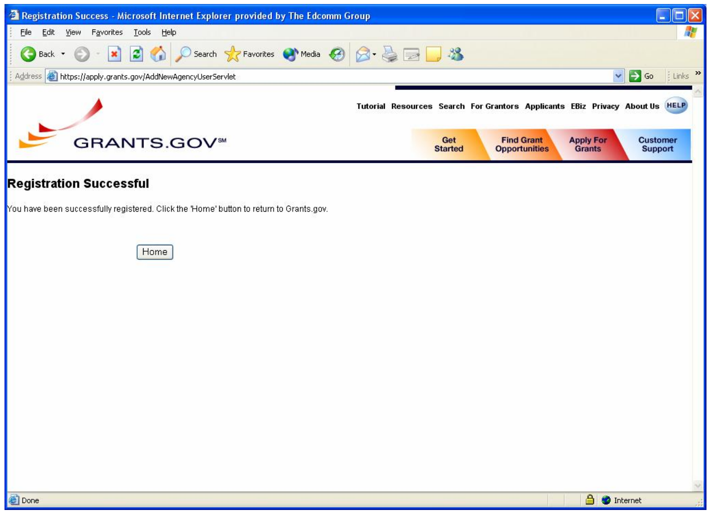
Enter your agency enrollment code in the **Agency Enrollment Code** field. If you enter an invalid enrollment code, you will not be able to register.

Click the **Cancel** button to return to the previous screen.

Click the **Submit** button to register.

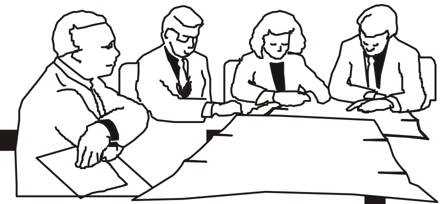
You will be taken to a **Registration Successful** screen confirming your registration.

Registration Successful screen



Click the **Home** button to return to the **Welcome** screen.

You will now be able to log into the **For Grantors** section.



Key Points

- **Access "Sign Up Now" from the "Login" screen.**
- **Agency Enrollment Codes assign users to an agency.**
- **Utilize customer support resources.**

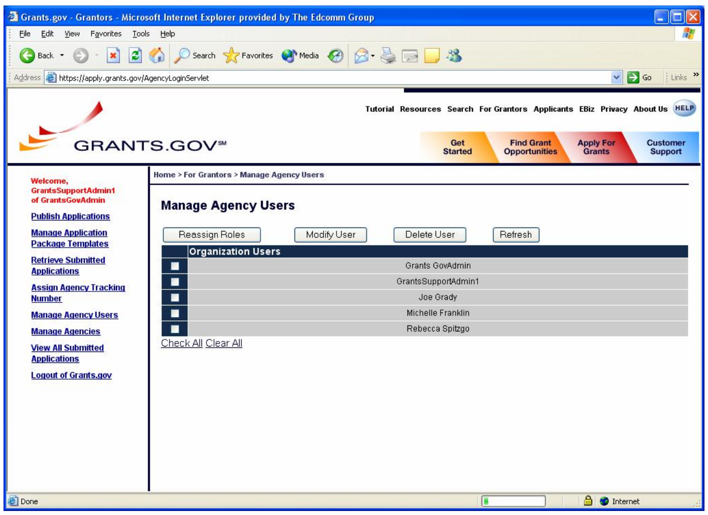
My Notes

Practice 7: Modify a User

To modify an existing agency user profile, click the **Manage Agency Users** link on the left of your screen.

This will take you to the **Manage Agency Users** screen.

Manage Agency Users screen



This screen displays the users currently registered with the agency or agencies that you represent.

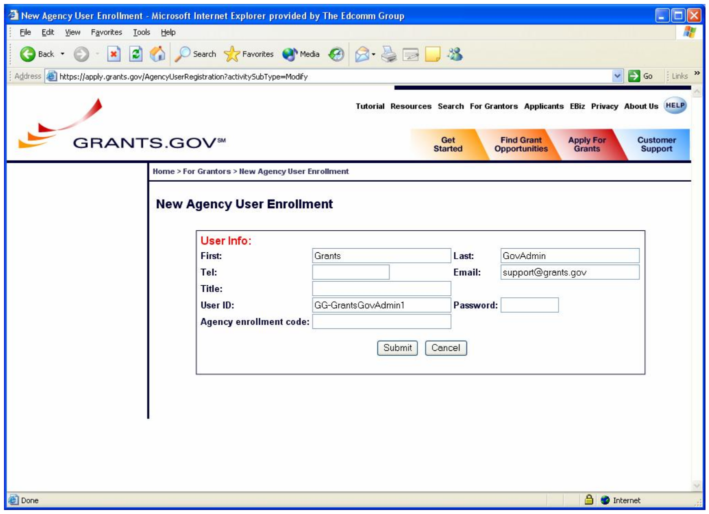
Select the user profile that you want to modify by clicking in the checkbox in the first column of that user's row.

> Note – if you make revisions to a user's profile, you will need to re-enter a password for the user.

Click the **Modify User** button above the listed users.

This will take you to the **Agency User Profile** screen.

Agency User Profile screen



Make any necessary revisions.

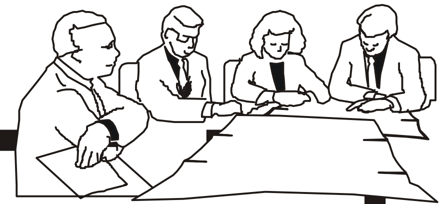
If you do not want to save the changes you made to the user profile, click the **Cancel** button at the bottom of the screen. You will be returned to the **Manage Agency Users** screen and the changes will not be saved.

OR

If you want to save the changes you made to the user profile, click the **Submit** button at the bottom of the screen.

> Note – if you make revisions to a user's profile, you will need to re-enter a password for the user.

You will be returned to the **Manage Agency Users** screen and the changes will be saved.



Key Points

- **Re-enter a password when you modify a profile.**
- **Check off the users you want to modify.**
- **Utilize customer support resources.**

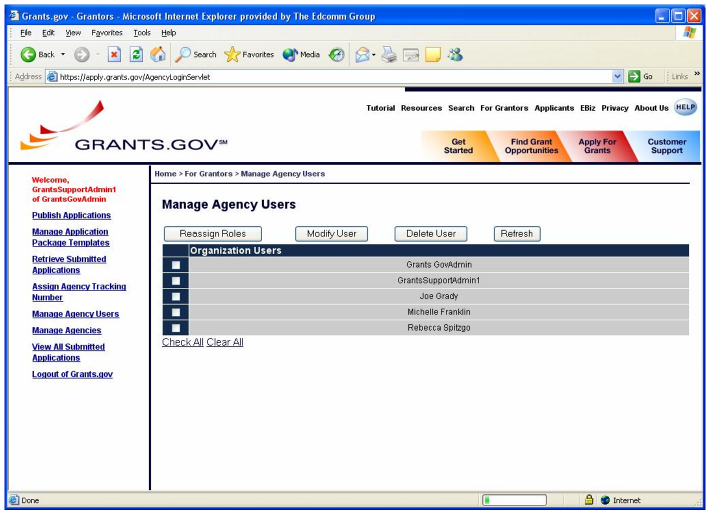
My Notes

Practice 8: Reassigning User Roles

To reassign user roles, click the **Manage Agency Users** link on the left of your screen.

This will take you to the **Manage Agency Users** screen.

Manage Agency Users screen



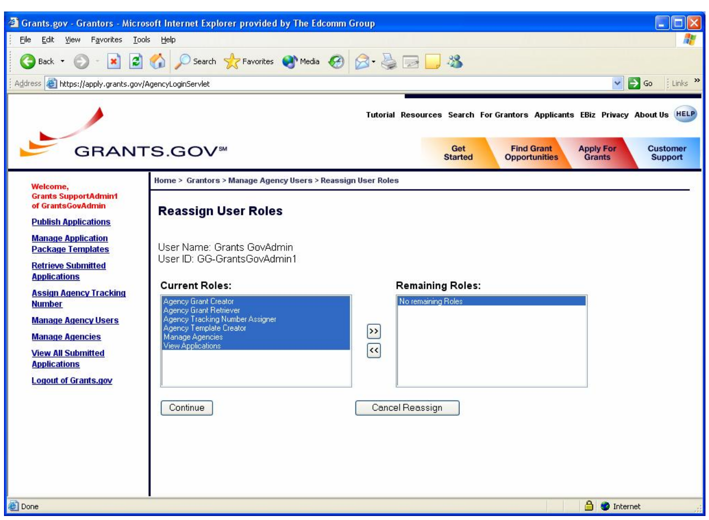
This screen displays the users currently registered with the agency or agencies that you represent.

Select the user you want to modify by clicking in the checkbox in the first column of that user's row.

Click the **Reassign Roles** button above the listed users.

This will take you to the **Reassign User Roles** screen.

Reassign User Roles screen



The **Current Roles** table lists the roles which are currently assigned to the user.

To add a role to the user, select the role that you want to assign to the user in the **Remaining Roles** table by clicking it. Then click the double arrow pointing to the left **<<**. The role will move from the **Remaining Roles** table to the **Current Roles** table.

To remove a role from the **Current Roles** table, select the role by clicking it and then click the double arrow pointing to the right **>>**. The role will move from the **Current Roles** table to the **Remaining Roles** table.

If you do not want to save the changes to the user roles, click the **Cancel Reassign** button at the bottom of the screen. You will be returned to the **Manage Agency Users** screen and the changes will not be saved.

OR

If you want to save the changes to the user roles, click the **Continue** button at the bottom of the screen. You will be returned to the **Manage Agency Users** screen and the changes will be saved.

Role Definitions

The **Agency Grant Creator** role allows a user to publish application packages.

The **Agency Grant Retriever** role allows a user to retrieve applications that were submitted to your agency.

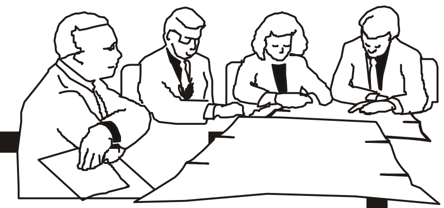
The **Agency Tracking Number Assigner** role allows a user to assign tracking numbers to submitted applications.

The **Agency Template Creator** role allows a user to manage application package templates.

The **Manage Agencies** role allows a user to manage agencies.

The **View Applications** role allows a user to view the applications submitted to your agency.

Key Points



- **Know the definition of each role.**
- **Only roles in the “Current Roles” box will be assigned.**
- **Utilize customer support resources.**

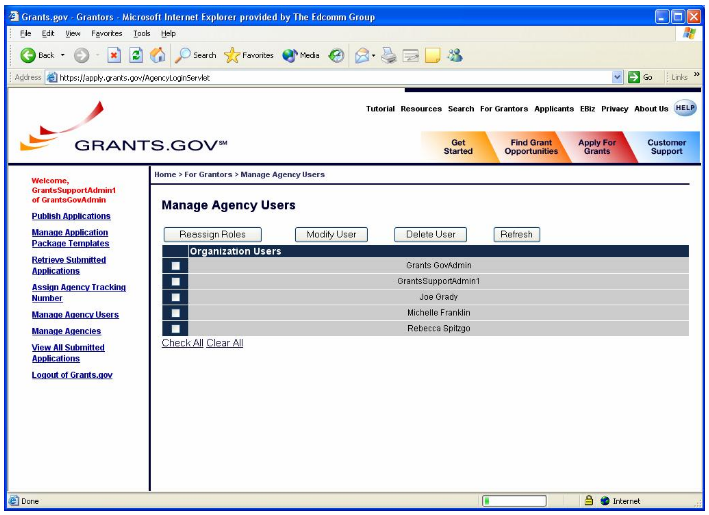
My Notes

Practice 9: Delete a User

To delete an existing agency user profile, click the **Manage Agency Users** link on the left of your screen.

This will take you to the **Manage Agency Users** screen.

Manage Agency Users screen



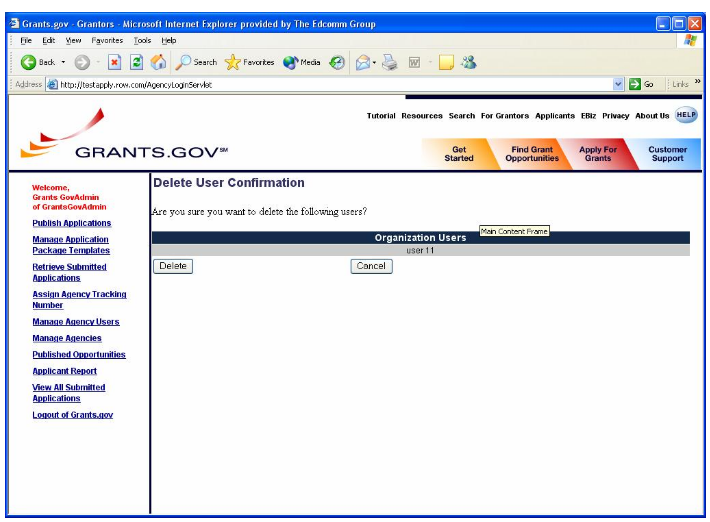
This screen lists the users currently registered for your agency.

Select the user profile that you want to delete by clicking in the check box in the first column of that user's row.

Click the **Delete User** button above the listed users.

This will take you to the **Delete User Confirmation** screen.

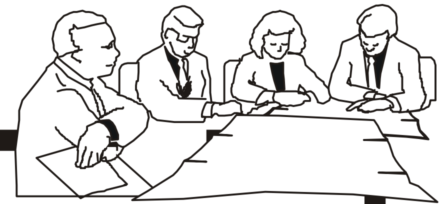
Delete User Confirmation screen



Click the **Delete** button to permanently remove the listed user.

OR

Click the **Cancel** button to return to the previous screen without deleting the listed user.



Key Points

- **Check off the user to delete.**
- **Deleting users is permanent.**
- **Utilize customer support resources.**

My Notes

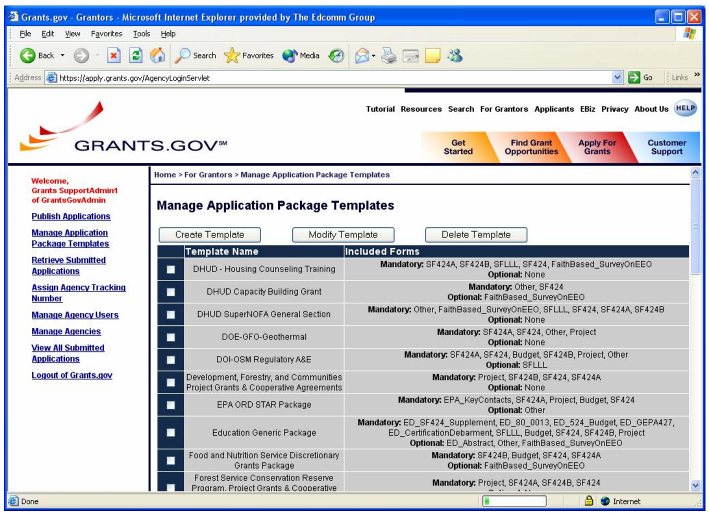
Practice 10: Create a New Application Package Template

To create a new application package template that can be used to create multiple opportunity specific application packages, click the **Manage Application Package Templates** link on the left of your screen.

Creating application package templates has no effect on application packages already published on Grants.gov.

This will take you to the **Manage Application Package Templates** screen.

Manage Application Package Templates screen

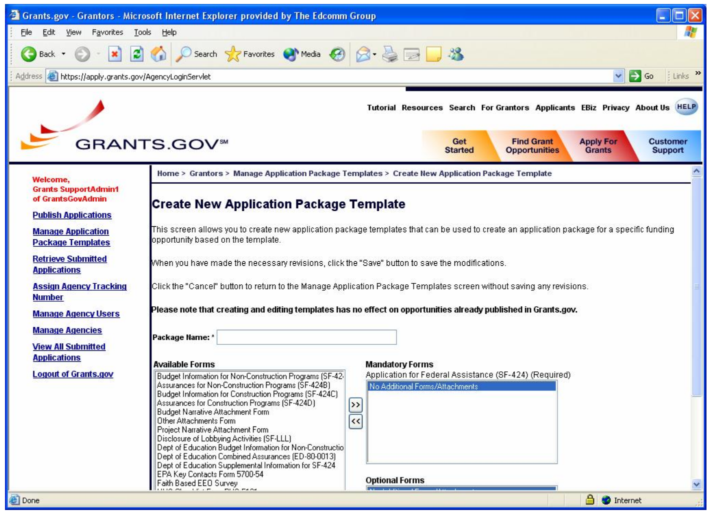


This screen displays the available application package templates.

Click the **Create Template** button above the listed application package templates.

This will take you to the **Create New Application Package Template** screen.

Create New Application Package Template screen



Enter a name for the application package template in the **Package Name** field. This field must be completed in order to create the new application package template.

The **Available Forms** box lists the documents and forms that can be included in the template.

To assign the forms required for the application, select the form name by clicking on it and click the double arrows pointing toward the right **>>** next to the **Mandatory Forms** box.

Note – the SF-424 is a required form for all applications.

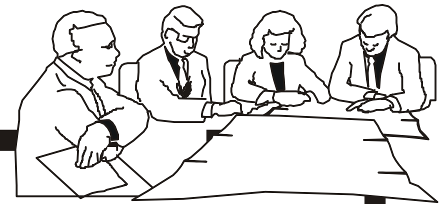
To assign the forms that are not required but may be used to provide additional support for the application, select the form name by clicking on it. Then click the double arrows pointing toward the right **>>** next to the **Optional Forms** box.

To remove a form from the **Mandatory Forms** or **Optional Forms** box, select the form name by clicking on it. Then click the double arrows pointing toward the left **<<** next to the appropriate box.

If you do not want to save the new the application package template, click the **Cancel** button at the bottom of the screen. You will be returned to the **Manage Application Package Templates** screen where the new application package template will not appear.

OR

If you want to save the new the application package template, click the **Save** button at the bottom of the screen. You will be returned to the **Manage Application Package Templates** screen where the new application package template will appear.



Key Points

- **The SF-424 is a mandatory form.**
- **Optional forms are used to provide application support.**
- **Utilize customer support resources.**

My Notes

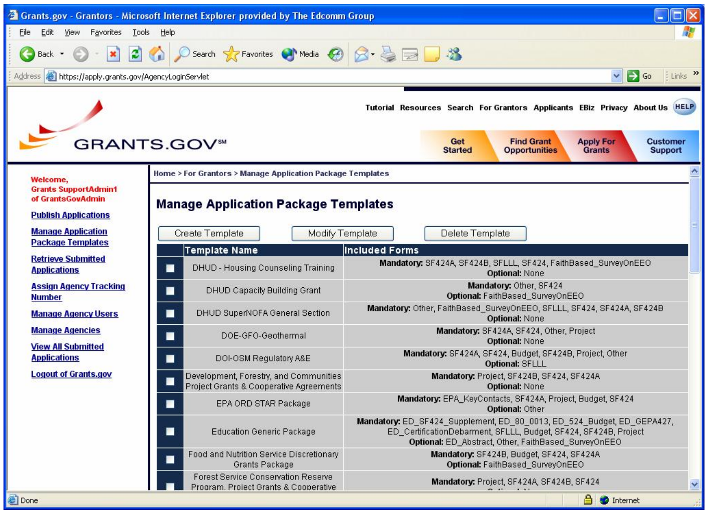
Practice 11: Modify an Application Package Template

To modify an existing application package template, click the **Manage Application Package Templates** link on the left of your screen.

Modifying application package templates has no effect on application packages already published on Grants.gov.

This will take you to the **Manage Application Package Templates** screen.

Manage Application Package Templates screen



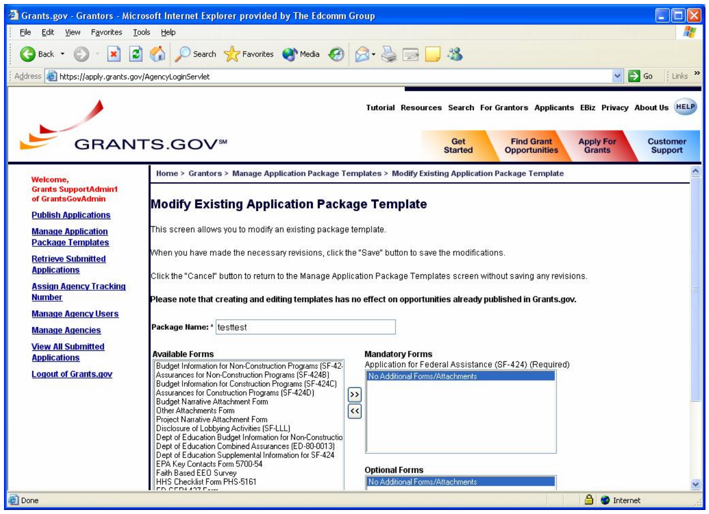
This screen displays the available application package templates.

Select the application package template that you want to modify by clicking in the checkbox in the first column of that template's row.

Click the **Modify Template** button above the listed application package templates.

This will take you to the **Modify Existing Application Package Template** screen.

Modify Existing Application Package Template screen



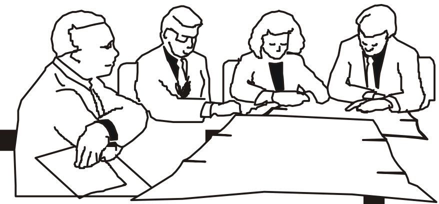
Make any necessary revisions.

If you do not want to save the changes you made to the application package template, click the **Cancel** button at the bottom of the screen. You will be returned to the **Manage Application Package Templates** screen and the revisions will not be saved.

OR

If you want to save the changes you made to the application package template, click the **Save** button at the bottom of the screen. You will be returned to the **Manage Application Package Templates** screen and the revisions will be saved.

> **Note** – the changes you made to the template will not be reflected in application packages that have already been published using the template. You will need to modify the application package and reselect the template in order for those changes to be reflected.



Key Points

- **Modifying templates does not affect published packages.**
- **You can only modify templates you created.**
- **Utilize customer support resources.**

My Notes

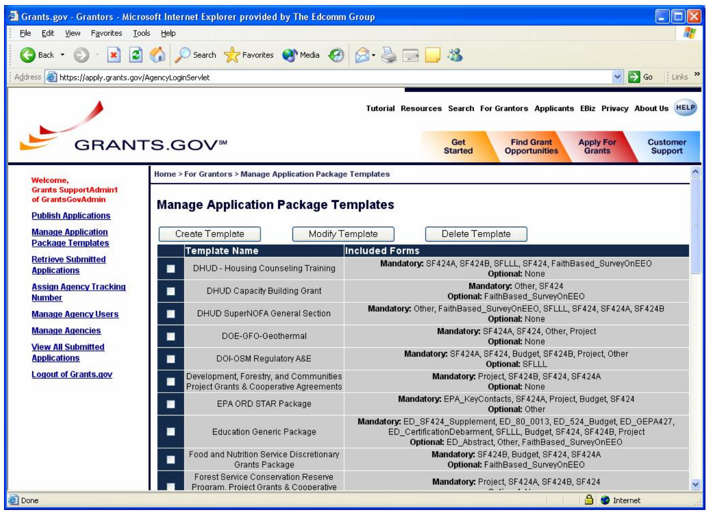
Practice 12: Delete an Application Package Template

To delete an existing application package template, click the **Manage Application Package Templates** link on the left of your screen.

> Deleting application package templates has no effect on application packages already published on Grants.gov.

This will take you to the **Manage Application Package Templates** screen.

Manage Application Package Templates screen



This screen displays the available application package templates.

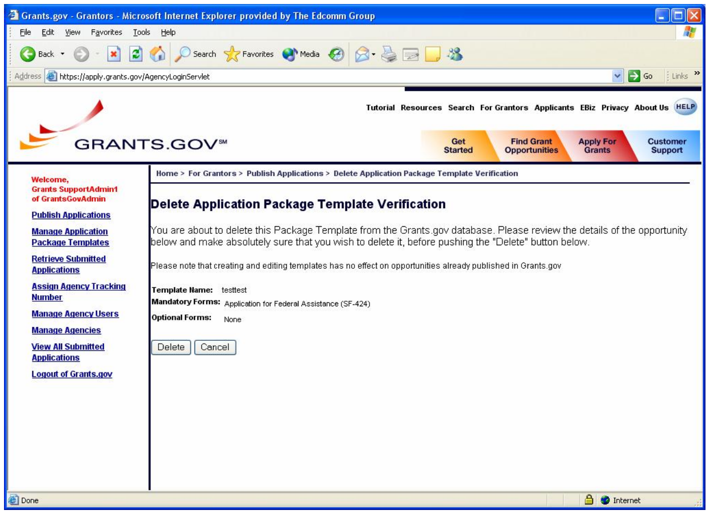
Select the application package template that you want to delete by clicking in the checkbox in the first column of that template's row.

> Note – You will not be able to delete application package templates that your agency did not create.

Click the **Delete Template** button above the listed application package templates.

This will take you to the **Delete Application Package Template Verification** screen.

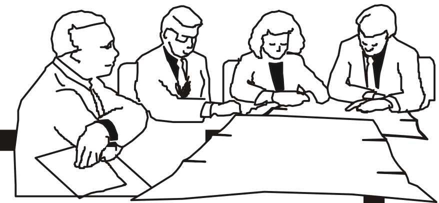
Delete Application Package Template Verification screen



Click the **Delete** button to permanently remove the listed template.

OR

Click the **Cancel** button to return to the previous screen without deleting the listed template.



Key Points

- **Deleting templates does not affect published packages.**
- **You can only delete templates you created.**
- **Utilize customer support resources.**

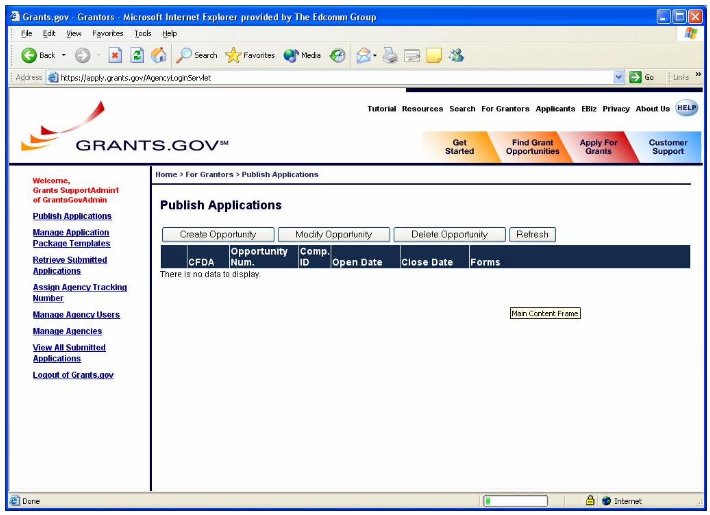
My Notes

Practice 13: Publish a New Application Package

To create new application packages to be posted at Grants.gov, click the **Publish Applications** link on the left of your screen.

This will take you to the **Publish Applications** screen.

Publish Applications screen

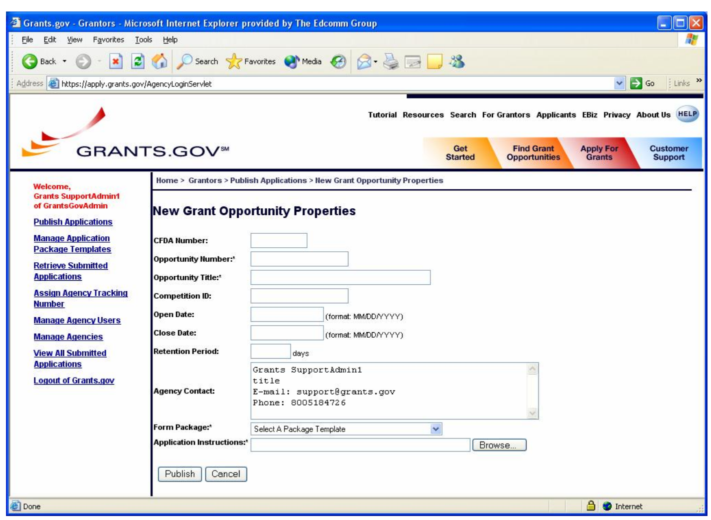


This screen displays the current application packages for the agency/agencies that you represent.

Click the **Create Opportunity** button above the listed application packages.

This will take you to the **New Grant Opportunities Properties** screen where you can enter information about the new application package.

New Grant Opportunities Properties screen



Enter your agency's CFDA number in the **CFDA Number** field. This must be a valid CFDA number.

Enter an opportunity number in the **Opportunity Number** field. This field must be completed in order to publish the application package.

Enter a title for the application package in the **Opportunity Title** field. This field must be completed in order to publish the application package.

Enter a competition ID in the **Competition ID** field.

Enter the date by which the opportunity should be made available in the **Open Date** field.

Enter the date by which the opportunity should no longer be available in the **Close Date** field.

Enter the number of days for which the package should be retained in the **Retention Period** field.

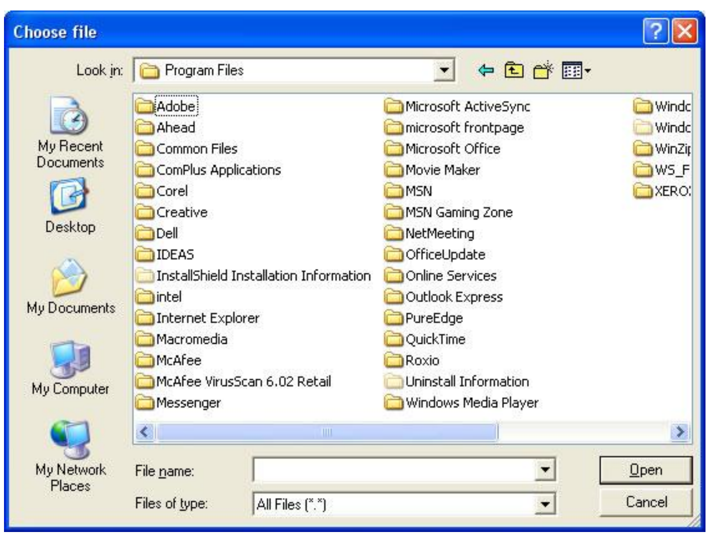
The **Agency Contact** field lists the first and last name, title, email address and phone number that was entered in your user profile. This information will be listed on the cover page of the application package as the agency contact information. You can edit any of the information listed simply by selecting the text and typing any revisions.

Select the application package template for the application by clicking the arrow next to the **Form Package** drop down box. This field must be completed in order to publish the application package.

You can upload application instructions from your computer by clicking the Browse button next to the **Application Instructions** field. This field must be completed in order to publish the application package.

This will open a **Choose File** window where you can browse on your computer to the file which contains the application instructions.

Choose File window



Once you have selected the correct file, click the **Open** button.

You will be returned to the **New Grant Opportunities** screen where the path to the file will now appear in the **Application Instructions** field.

If you want to select a new file, simply click the Browse button again, select the correct file, and click the **Open** button.

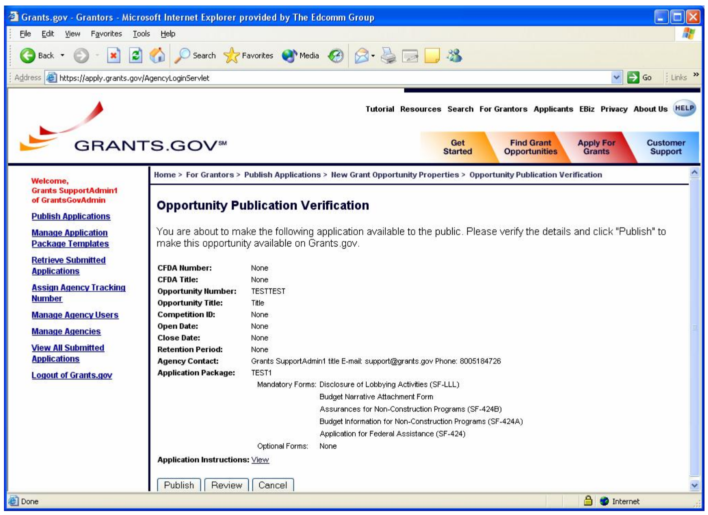
If you do not want to save the new the application package, click the **Cancel** button at the bottom of the screen. You will be returned to the **Publish Applications** screen where the new application package will not appear.

OR

If you want to save the new the application package, click the **Publish** button at the bottom of the screen.

This will take you to the **Opportunity Publication Verification** screen.

Opportunity Publication Verification screen



Review the information listed.

To view the application instructions that you uploaded, click the **View** link in the **Application Instructions** field.

If the information listed is not correct, click the **Review** button to return to the previous screen so that you can make any necessary revisions, or click the **Cancel** button to return to the **Publish Applications** screen without creating the new application package.

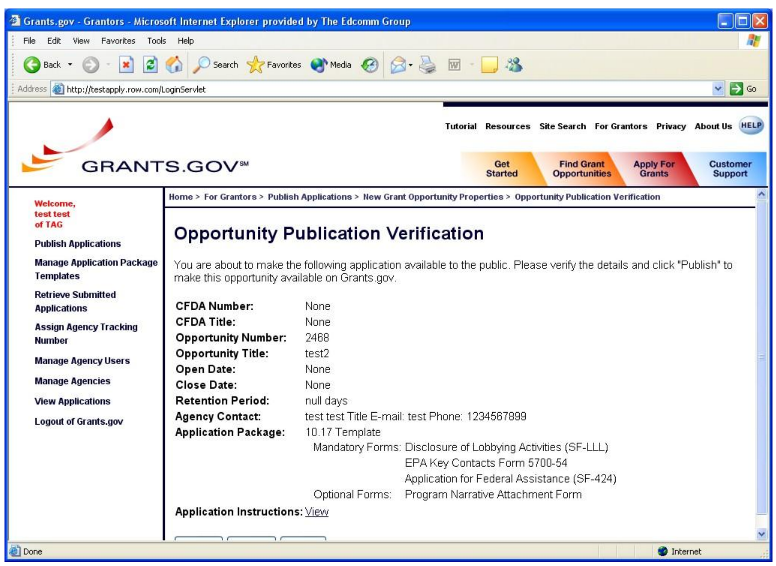
OR

If the information is correct, click the **Publish** button. This will make the new application package available to the public. You will be taken to an **Opportunity Publication** screen which will confirm that the new application package is now available for public download.

Opportunity Publication screen

Click the **Continue** button to return to the **Publish Applications** screen. Your new application package will be listed with the other packages published for your agency.

Opportunity Publication Verification screen



Review the information listed.

To view the application instructions that you uploaded, click the **View** link in the **Application Instructions** field.

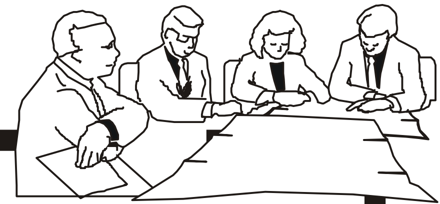
If the information listed is not correct, click the **Review** button to return to the previous screen so that you can make any necessary revisions, or click the **Cancel** button to return to the **Publish Applications** screen without creating the new application package.

OR

If the information is correct, click the **Publish** button. This will make the new application package available to the public. You will be taken to an **Opportunity Publication** screen which will confirm that the new application package is now available for public download.

Opportunity Publication screen

Click the **Continue** button to return to the **Publish Applications** screen. Your new application package will be listed with the other packages published for your agency.



Key Points

- **Complete all the required fields.**
- **You can update the Agency Contact information.**
- **Utilize customer support resources.**

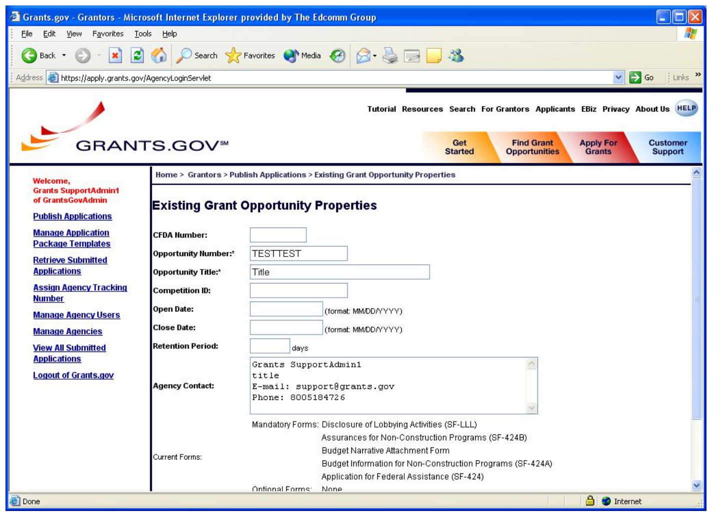
My Notes

Practice 14: Modify an Application Package

To modify an application package that is published at Grants.gov, click the **Publish Applications** link on the left of your screen.

This will take you to the **Publish Applications** screen.

Publish Applications screen



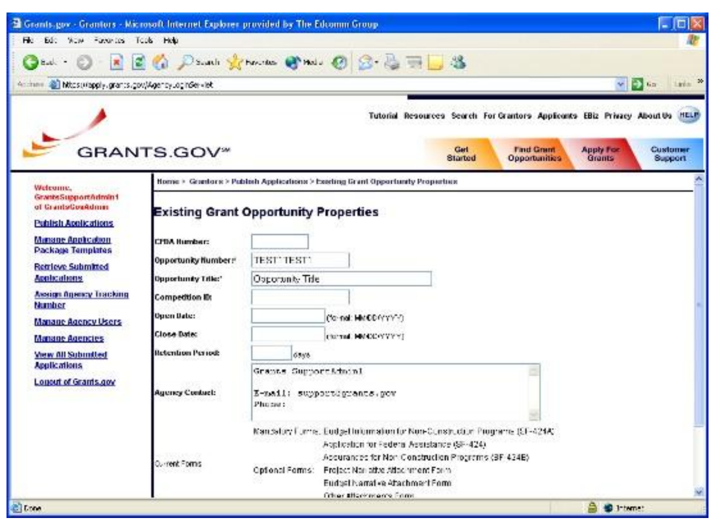
This screen displays the current application packages for the agency/agencies that you represent.

Select the application package that you want to modify by clicking in the checkbox in the first column of that application's row.

Click the **Modify Opportunity** button above the listed application packages.

This will take you to the **Existing Grant Opportunities Properties** screen.

Existing Grant Opportunities Properties screen



Make any necessary revisions.

> Note – If you change the template associated with a published application package and an applicant submits an application which has the old template in it, Grants.gov will reject the application.

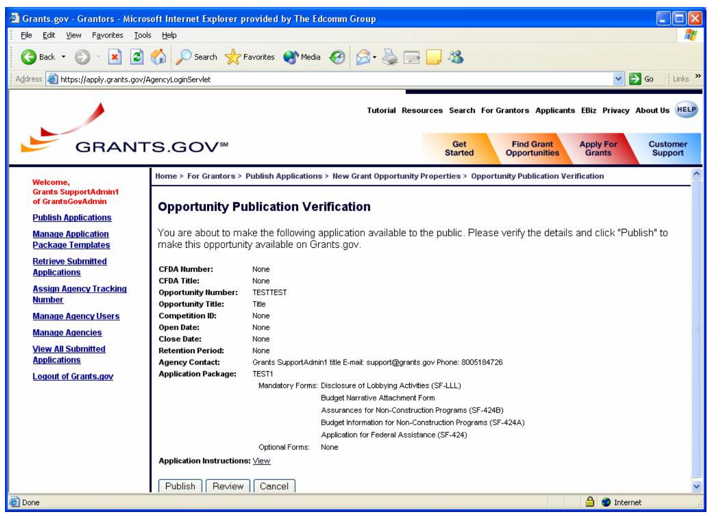
If you do not want to save the changes you made to the opportunity, click the **Cancel** button at the bottom of the screen. You will be returned to the **Publish Applications** screen and the changes will not be saved.

OR

If you want to save the changes you made to the opportunity, click the **Publish** button at the bottom of the screen to save the changes.

This will take you to the **Opportunity Publication Verification** screen.

Opportunity Publication Verification screen



Review the information listed.

To view the application instructions, click the View link in the **Application Instructions** field.

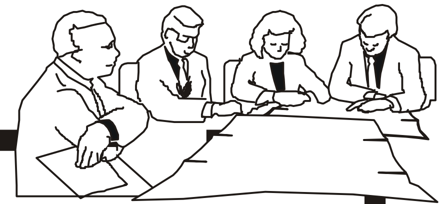
If the information is not correct, click the **Review** button to return to the previous screen so that you can make any necessary revisions, or click the **Cancel** button to return to the **Publish Applications** screen.

OR

If the information is correct, click the **Publish** button. This will make the updated application package available to the public. You will be taken to an **Opportunity Publication** screen which will confirm that the modified application package is now available for public download.

Opportunity Publication screen

Click the **Continue** button to return to the **Publish Applications** screen.



Key Points

- **Check off the package you want to modify.**
- **Review package details before publishing.**
- **Utilize customer support resources.**

My Notes

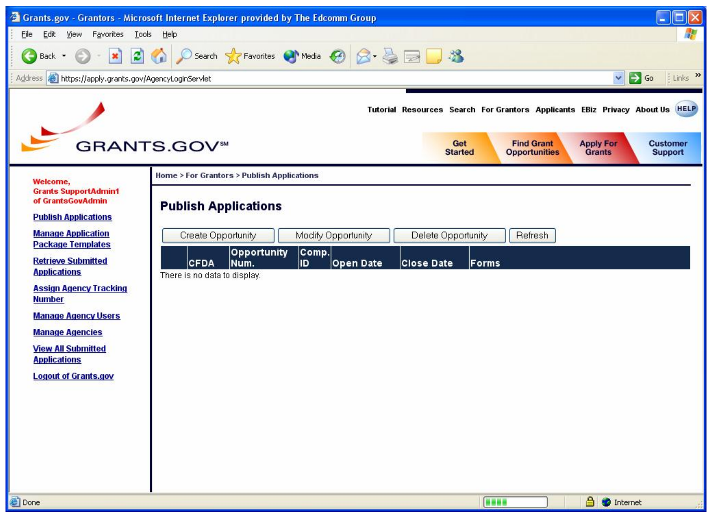
Practice 15: Delete an Application Package

To delete an existing application package, click the **Publish Applications** link on the left of your screen.

> Note – Once an application package is deleted, Grants.gov will no longer accept or process any applications which use the deleted package.

This will take you to the **Publish Applications** screen.

Publish Applications screen



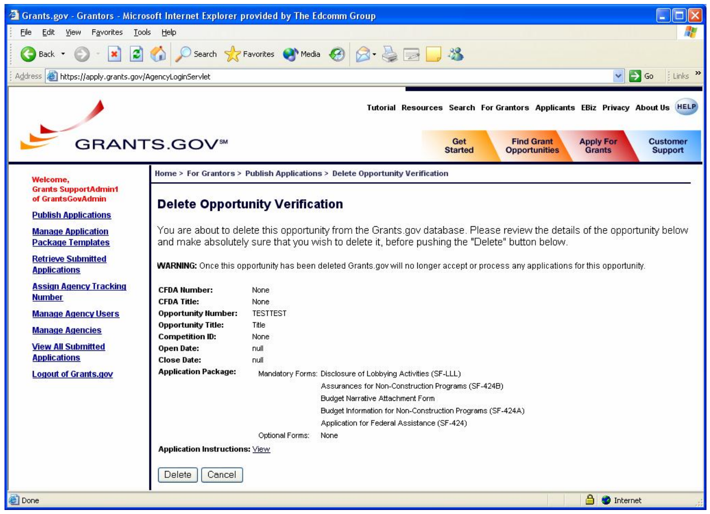
This screen displays the current application packages for the agency/agencies that you represent.

Select the application package that you want to delete by clicking in the checkbox in the first column of that package's row.

Click the **Delete Opportunity** button above the listed application packages.

This will take you to the **Delete Opportunity Verification** screen.

Delete Opportunity Verification screen



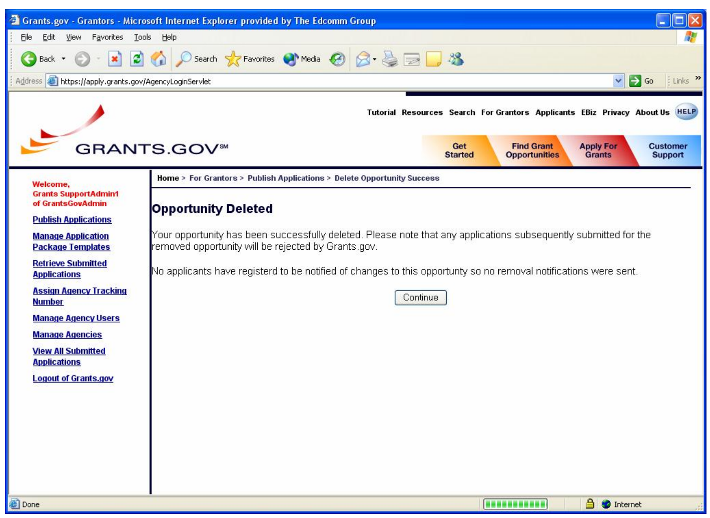
Click the **Cancel** button to return to the previous screen without deleting the listed template(s).

OR

Click the **Delete** button to permanently remove the listed application package.

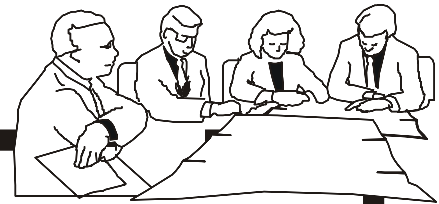
This will take you to the **Opportunity Deleted** screen.

Opportunity Deleted screen



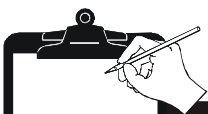
Click the **Continue** button to return to the **Publish Applications** screen.

Click the **Refresh** button to update the **Publish Applications** screen so that the application package you deleted no longer appears.



Key Points

- **Applications will not be accepted for deleted packages.**
- **Review the package information before deleting.**
- **Utilize customer support resources.**



My Notes

Practice 16: Downloading Application Viewer

In order to access, complete and submit applications, you will need to download and install the PureEdge Viewer, a small, free program.

PureEdge Viewer: Minimum System Requirements

For PureEdge Viewer to function properly, your computer must meet the following system requirements:

Windows 98, ME, NT 4.0, 2000, XP*

500 Mhz processor

128 MB of RAM

40 MB disk space

Web browser: Internet Explorer 5.01 or higher, Netscape Communicator 4.5 - 4.8, Netscape 6.1, 6.2, 7

*If you do not have a Windows operating system, you can still use PureEdge by using a Windows Emulation Program.

MAC users: Please review the MAC white paper below published by PureEdge for additional information:

Mac Support for PureEdge (http://www.grants.edcomm.com/files/Mac Support11.pdf)

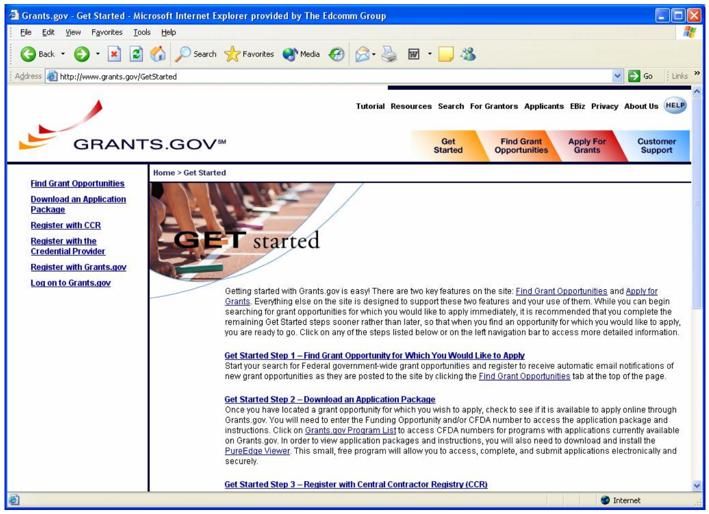
If you have problems setting-up the software, you may not have security permissions to install new programs on your system. If that is the case, you should contact your system administrator.

Downloading PureEdge Viewer

Click the **Get Started** tab at the top of any screen.

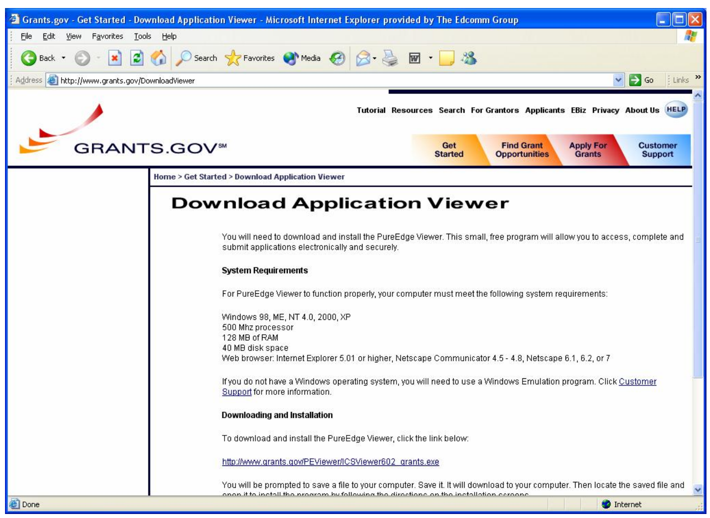
This will take you to the **Get Started** screen.

Get Started screen



Click the **Download Application Viewer** link on the left side of the screen.

Download Application Viewer screen



Click the http://www.grants.gov/PEViewer/ICSViewer602_grants.exe link.

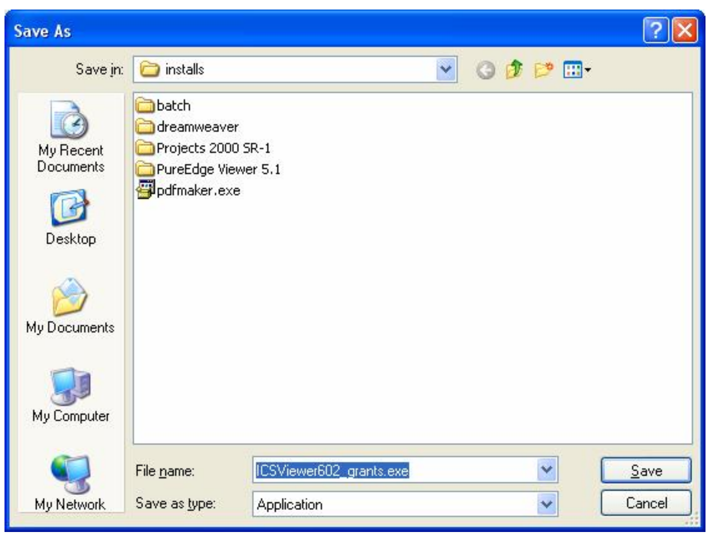
This will open the **File Download** window.

File Download window

Click the **Save** button.

This will open the **Save As** window where you can designate where the program should save on your computer.

Save As window

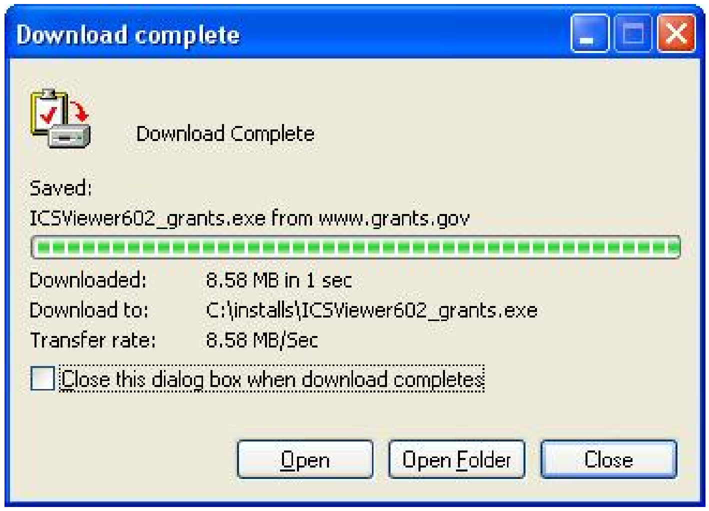


Browse to where you would like the program to save on your computer.

Once you have browsed to where you want PureEdge Viewer to save on your computer, click the **Save** button.

This will download the program. While the program is downloading, the **Download complete** window will show its progress.

Download Complete window



Make sure that the box next to **Close this dialog bow when download completes** is NOT checked on the **Download Complete** window.

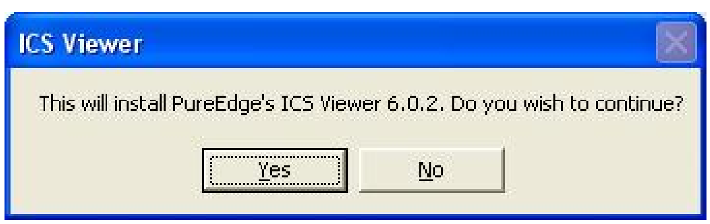
Installing PureEdge Viewer

When the download has completed, click the **Open** button on the **Download complete** window.

> If the Download Window closes when the download completes, you will need to locate the file that downloaded on your computer and open it.

When the installation file opens, it will prompt you with: **This will install PureEdge's ICS Viewer 6.0.2. Do you wish to continue?**

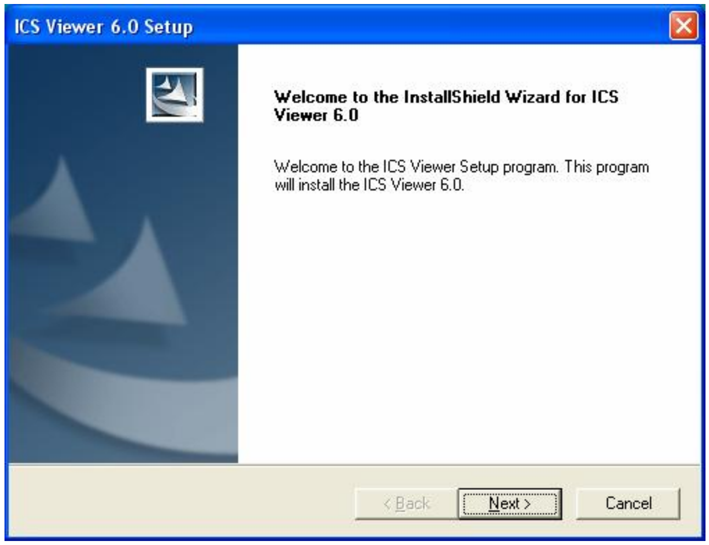
Prompt screen



Click the **Yes** button.

This will open the **ICS Viewer 6.0 KeySign** program setup.

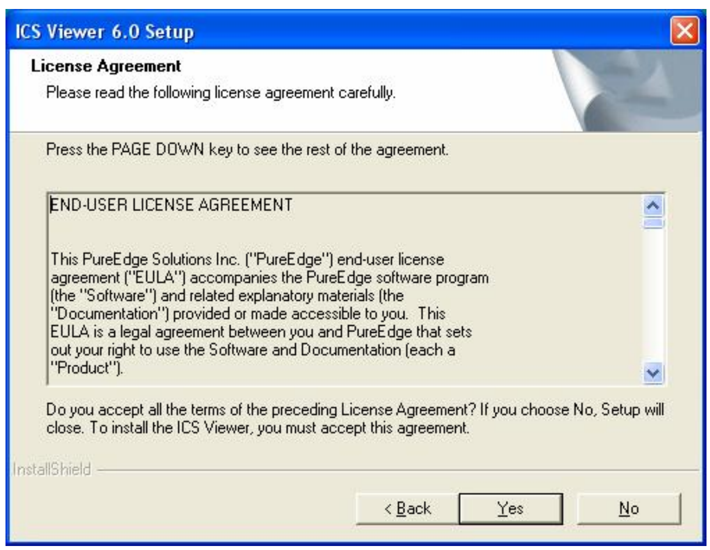
Welcome screen



Click the **Next** button to continue.

This will take you to the License Agreement.

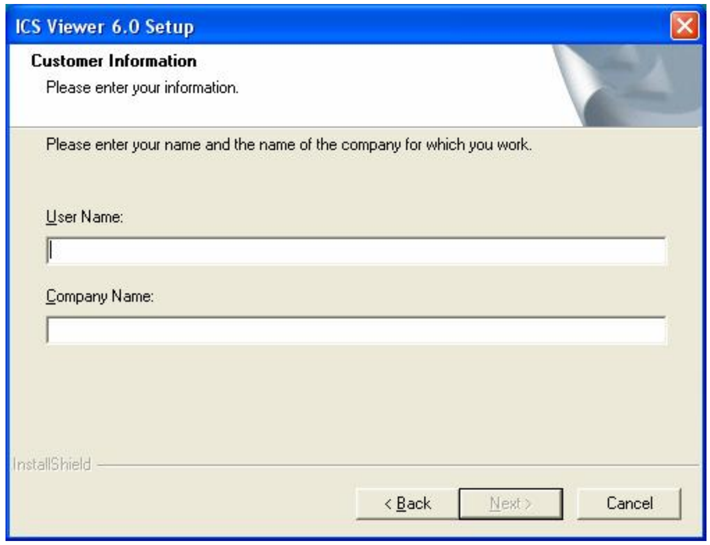
License Agreement screen



Read the License Agreement and click the **Yes** button to accept the agreement and continue with the installation.

This will take you to the **Customer Information** screen.

Customer Information screen



Enter a user name in the **User Name** field.

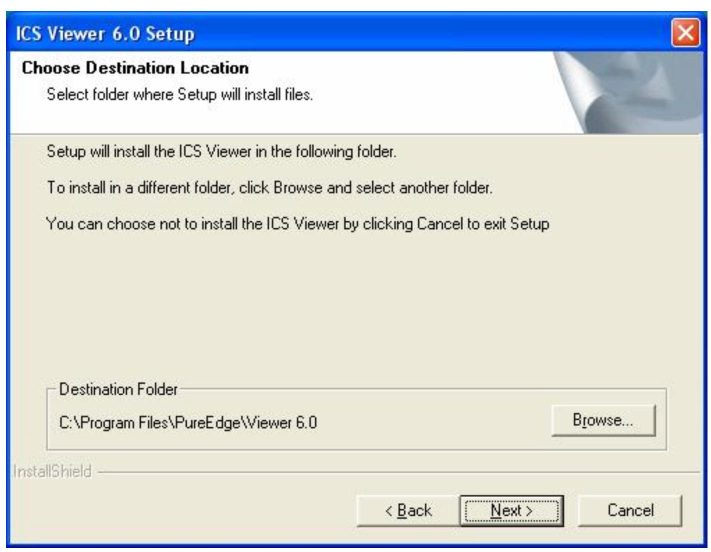
Enter your company’s name in the **Company Name** field.

Click the **Next** button.

> **Note** – the **Next** button will not become active until both fields are completed.

This will take you to **Choose Destination Location** screen.

Choose Destination Location screen



We recommend that you save the program at the default location displayed in the **Destination Folder** box.

Click the **Next** button to continue.

This will take you to **Select Program Folder** screen.

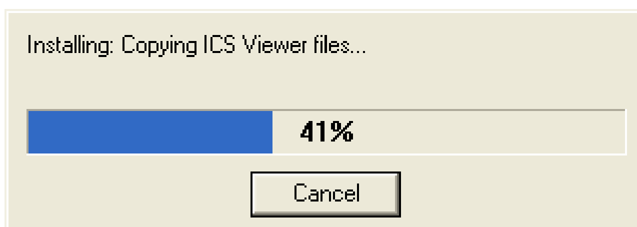
Select Program Folder screen

We recommend that you name the program folder the default name listed in the **Program Folder** field.

Click the **Next** button to continue.

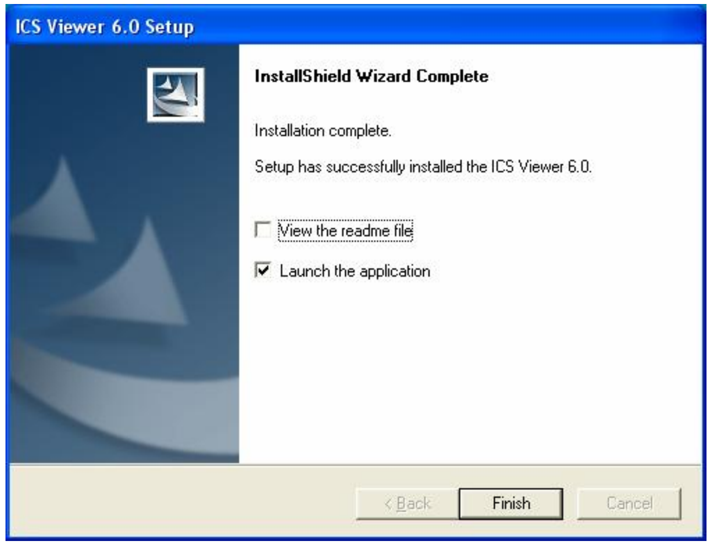
This will install the program. The installation progress will be displayed in the **Install** window.

Install window



When the installation has completed, the **InstallShield Wizard Complete** screen will appear.

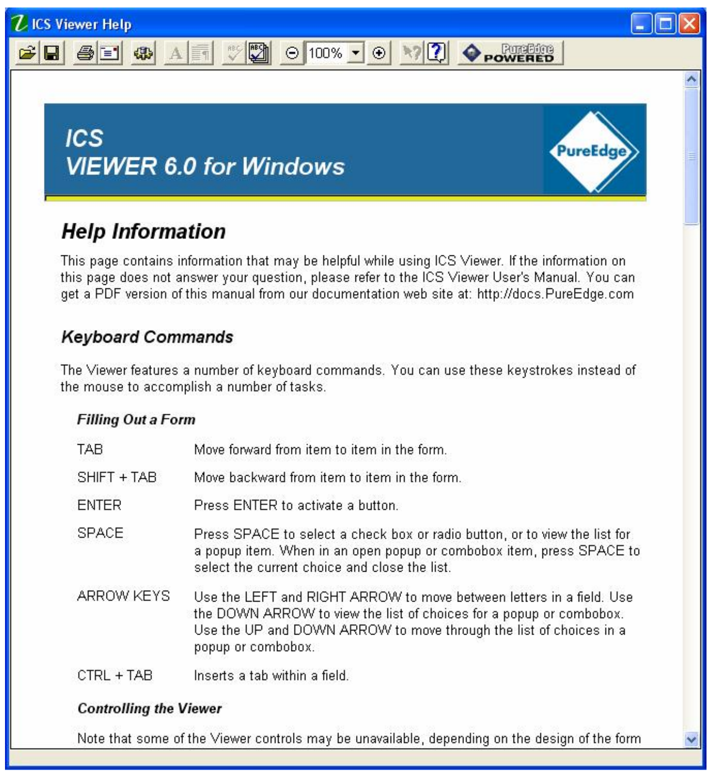
InstallShield Wizard Complete screen

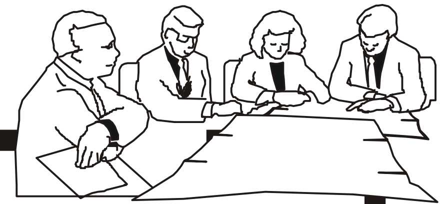


Click the **Finish** button.

This will launch the program and open the **ICS Viewer Help Information** window.

ICS Viewer Help Information window





Key Points

- **Make sure system requirements are met.**
- **Use Windows Emulation on non-Windows systems.**
- **Utilize customer support resources.**

My Notes

Practice 17: Requesting a DUNS Number

A Data Universal Numbering System (DUNS) number is required as part of the CCR registration process.

The DUNS number is a unique nine-character identification number provided by the commercial company Dun & Bradstreet (D&B).

Call 1-866-705-5711 to request a DUNS number. This will take about 10 minutes. There is no charge.

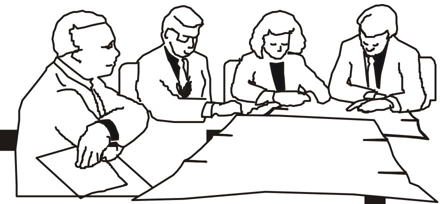
Have following information ready when you call:

- Name of business
- Business address
- Local phone number
- Name of the CEO/business owner
- Legal structure of the business (corporation, partnership, proprietorship)
- Year business started
- Primary line of business
- Total number of employees (full and part time)

Once you have completed the registration, your DUNS number should be available the next business day.

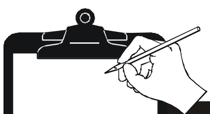
As a result of obtaining a DUNS number you have the option to be included on D&B's marketing list that is sold to other companies. If you do not want your name/organization included on this marketing list, request not to be listed or deleted from D&B's marketing file when you are speaking with a D&B representative during your DUNS number telephone application.

You can request a DUNS number online, but the process can take up to 30 business days to complete. If your business is located in the United States, you can request and register for a DUNS number by calling 1-866-705-5711. If your business is located outside of the United States, call your local Dun & Bradstreet office. To find your local office, please consult Dun & Bradstreet's International Dialing List (http://www.grants.gov/assets/D&B International CRC Phone Numbers.doc).



Key Points

- **Call 1-866-705-5711 to request a DUNS number.**
- **Have all information ready before calling.**
- **Utilize customer support resources.**



My Notes

Practice 18: Registering with CCR

In order to help centralize information about grant recipients and provide a central location for grant recipients to change organizational information, the government will be using the Central Contractor Registry (CCR) for grant applicants and recipients.

CCR is a government-wide registry for vendors doing business with the federal government. Grants.gov is specifically leveraging using CCR as a procedural mechanism to establish roles and IDs for those electronically applying for grants. In the future, the government anticipates requiring all grant applicants to use CCR whether applying for grant electronically or otherwise.

General Information

Organizations should register on how they want to do business.

A separate registration in the CCR may be required if an organization wants to have a single unit conduct business and it has a direct payment flow to that organization, it would require a separate DUNS number specified for that unit (if a different address from the parent organization). If the same address, the organization could use the DUNS + 4 found in the CCR.

> For example, a university that wants to have its payment information flow through one central point for grants should register as the entity doing business with the government. This registration would require a specific DUNS number for that business.

If you have the necessary information ready, online registration will take about 30 minutes to complete, depending upon the size and complexity of your organization. You should receive your CCR registration within 5 business days.

Instructions for Registering

Information for registering in the CCR and online documents can be found at www.ccr.gov.

Before registering applicants and recipients should review the Central Contractor Registration Handbook (March 2003). In the handbook is a Registration Worksheet. You can also access this worksheet by browsing to http://www.ccr.gov/CCRRegTemplate.pdf. You will need Adobe Reader to view this worksheet.

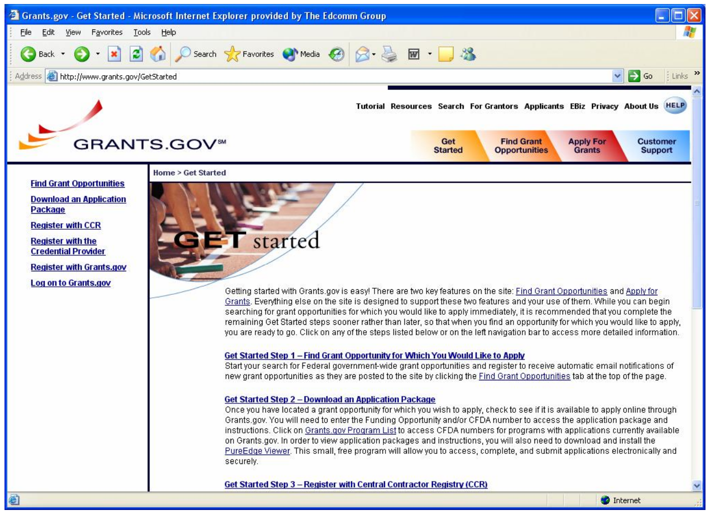
It is recommended that registrants print the registration worksheet and gather the needed information prior to starting the online registration process.

The fastest and easiest method to register is by computer.

Click the **Get Started** tab at the top of any screen.

This will take you to the **Get Started** screen.

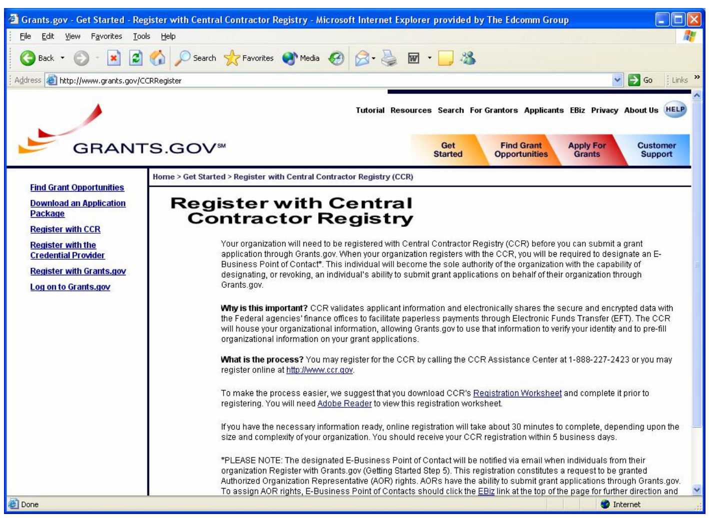
Get Started screen



Click the **Register with CCR** link on the left side of the screen.

This will take you to the **Register with CCR** screen.

Register with CCR screen



Click the link to CCR:

http://www.ccr.gov

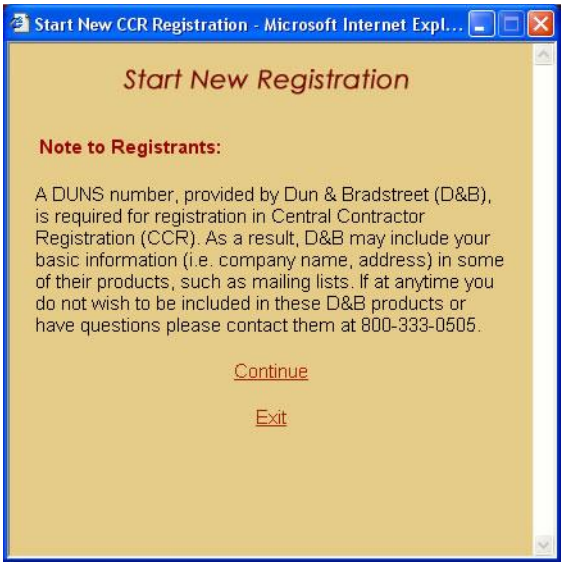
This will take you to the **CCR** website.

Register with CCR screen

Click the **Start New Registration** link on the left of the screen.

This will pop-up a reminder that you will need a DUNS number to register with CCR.

DUNS Pop-Up



If you have your DUNS number, click **Continue**. If you do not, follow the directions to register for a DUNS number. Detailed instructions can be found in the **Requesting a DUNS** topic.

This will take you to the **CCR Registration** screen.

CCR Registration screen

Once you have completed the online registration, it will take approximately 6 business days before your CCR registration becomes active. Once your CCR registration becomes active, you will be able to register with the Credential Provider.

Registration Worksheet for Grant Applicants/Recipients

General Information:

Enter all information that has an **M** placed next to the line meaning Mandatory or Required.

The registration is pretty self-explanatory.

Identified below are some items with which you may not be familiar:

Cage Code:

For U.S. applicants, do not enter a Cage Code, one will be assigned.

For foreign applicants, follow the instructions in the CCR.

Legal Business Name:

Enter the name of the business or entity as it appears on legal documents.

Business Name:

Enter the name of the organization/entity which is applying for a grant.

Annual Revenue:

For some organizations/entities this can be an annual budget.

Type of Organization:

In this section, indicate whether the organization/entity is Tax Exempt or Not. Indicate what type or how the organization is recognized. Use "Other" if the organization does not fit in the designated categories.

Owner Information:

Fill-in if a sole proprietorship.

Business Types:

As indicated, check all that apply. Check the ones that are the closest description to your organization. Most grant applicants can use "Nonprofit Institution" plus any other type that may fit the description. (The listing is being revised to include grant applicants business types.)

Party Performing Certification:

Enter information only if the organization has a certification from SBA. Most grant recipients and applicants do not fall into this category.

Goods and Services:

This section is required. It will require the grant applicant/recipient to look up a code and enter the ones that best fit the type of services the organization provides. It is not required to fill-in all the spaces provided for the codes.

NAICS Code:

Is required. Follow the instructions.

SIC Code:

Is required. Follow the instructions.

Financial Information:

Follow the instructions found in the CCR Handbook on page 14; http://www.ccr.gov/handbook.pdf

Registration Acknowledgement and Point of Contact Information

This section is very important and needs to have names and telephone numbers put in for specific purposes. For grant applicants and recipients the **M** fields are required.

CCR Point of Contact:

Mandatory. Enter the name of the person that knows and acknowledges that the information in the CCR is current, accurate and complete. The person named here will be the only person within the registering organization to receive the Trading Partner Identification Number (TPIN) via e-mail or U.S. mail services. The registrant and the alternate are the only people authorized to share the information with the CCR Assistance Center personnel. An email address is required. An alternate is also required for registration.

The person listed as the CCR Point of Contact will also be designated as the Grants.gov CCR E-Business Point of Contact. This person will have the responsibility of assigning the "Authorized Applicant" role to all who register to submit applications for their organization. The E-Business Point of Contact will receive an email each time someone registers with the Credential Provider in order to be able to submit applications on behalf of their organization. The E-Business Point of Contact will need to login to the E-Business Point of Contact section of Grants.gov and manually assign the "Authorized Applicant" role to designate someone as an Authorized Organization Representative (AOR).

Government Business Point of Contact:

Not mandatory; review CCR Handbook on page 16; http://www.ccr.gov/handbook.pdf.

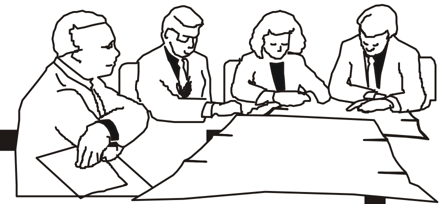
Electronic Business Point of Contact:

Mandatory. Grant applicants/recipients must provide a name of an individual who will be responsible for approving the Role Manager for the organization. The Role Manager will be required to approve individuals who are authorized to submit grant applications on behalf of the organization. Email and telephone number are required. An alternate is required.

Past Performance Point of Contact:
Not required.

Marketing Partner ID (MPIN):
Mandatory for Grants.gov submission. This is a self-defined access code that will be shared with authorized electronic partner applications. The MPIN will act as your password in other systems. The MPIN must be nine positions and contain at least one alpha character, one number and no spaces or special characters.

Registration Notification:
Once the registration is completed, a TPIN will be emailed or sent via the U.S. Postal Service to the organization's point of contact. If registration is done electronically, notification will be sent via email within five days of registration.



Key Points

- **DUNS are required to register with CCR.**
- **Gather all information before registering.**
- **Utilize customer support resources.**

My Notes

Practice 19: Registering with a Credential Provider

Note – your CCR registration must be complete and active before you can register with the Credential Provider. This process takes approximately six business days after completing the online registration.

In order to safeguard the security of your electronic information, Grants.gov utilizes E-Authentication - the Federal program that ensures secure transactions.

E-Authentication defines the level of trust or trustworthiness of the parties involved in a transaction through the use of Credential Providers. It is the process of determining with certainty that someone really is who he/she claims to be.

Grants.gov is using Operational Research Consultants (ORC) as its Credential Provider.

Once you are registered with ORC, you will receive an ID and password to have your grant application forwarded to the appropriate government agency safely and securely.

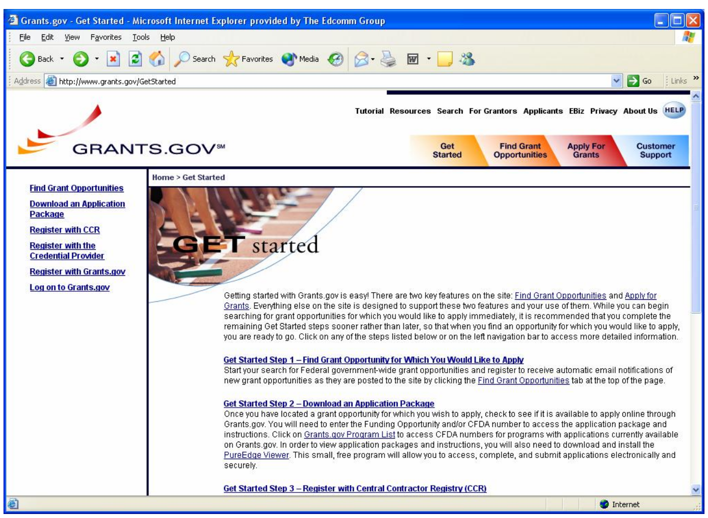
Registering with the Credential Provider

Registering with a Credential Provider is a simple process:

Click the **Get Started** tab at the top of any screen.

This will take you to the **Get Started** screen.

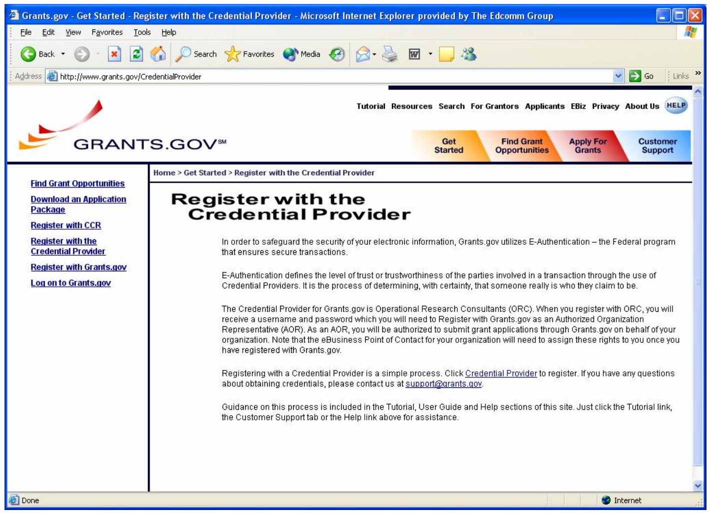
Get Started screen



Click the **Register with Credential Provider** link on the left side of the screen.

This will take you to the **Register with the Credential Provider** screen.

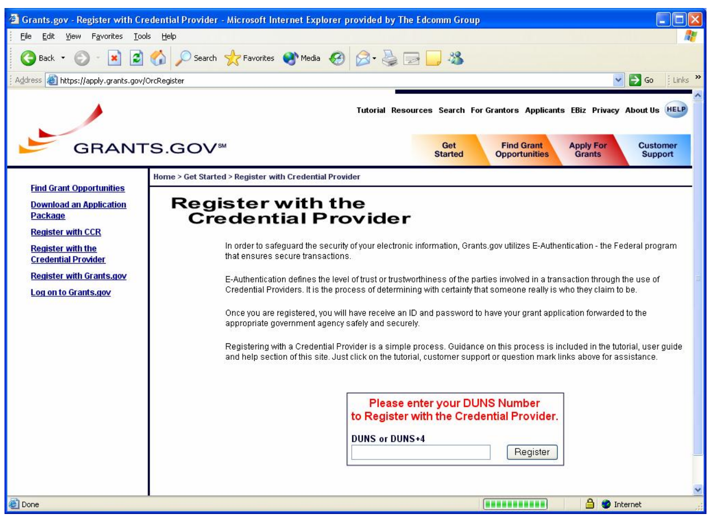
Register with the Credential Provider screen



Click the **Credential Provider** link in the middle of the screen.

This will take you to the **Register with the Credential Provider** screen where you will need to enter your DUNS number.

Register with the Credential Provider screen



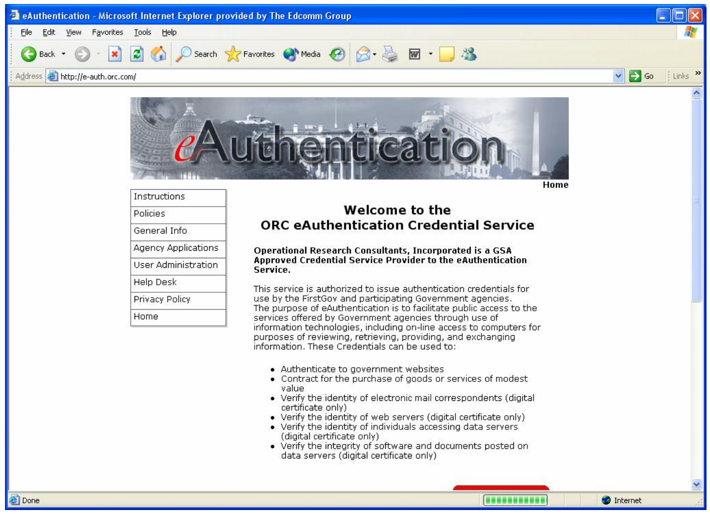
Enter your DUNS number in the **DUNS or DUNS + 4** field.

> Note – If you have a nine digit DUNS number, you will need to add four zeros to the end of the DUNS number.

Click the **Register** button.

You may be prompted that you are entering a secure site. Click **OK** to continue.

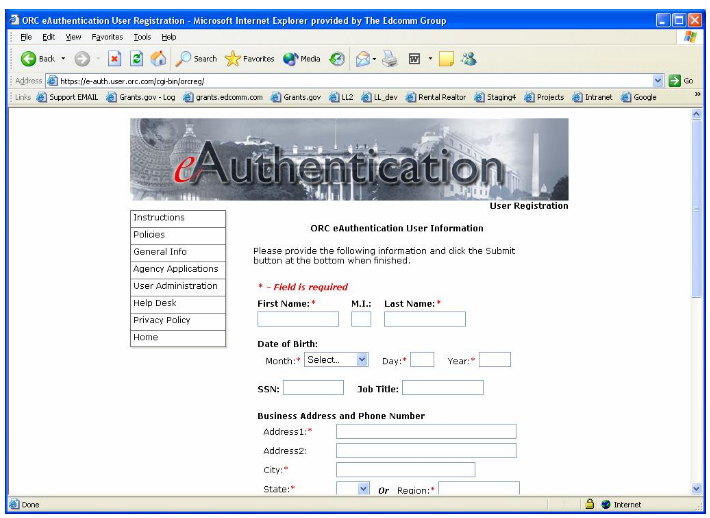
eAuthentication screen



Click the **UserID** button.

This will take you to the **User Information** screen.

User Information screen

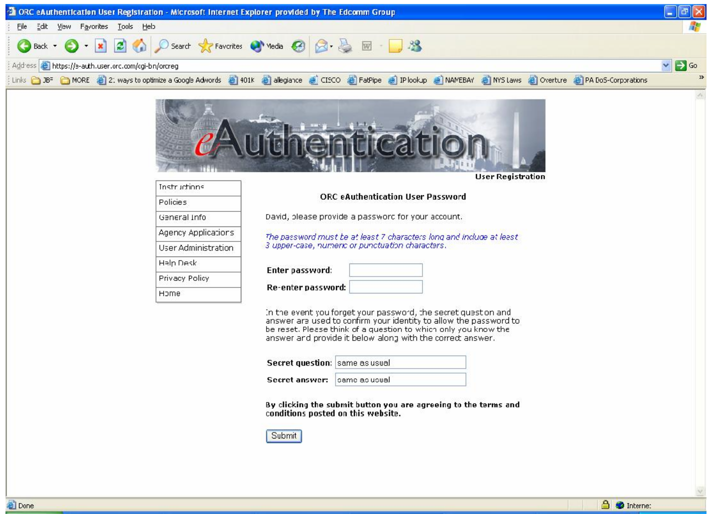


Enter all of the required information in the appropriate fields. Required fields are noted by an asterisk *.

Click the **Submit** button.

This will take you to the **User Password** screen.

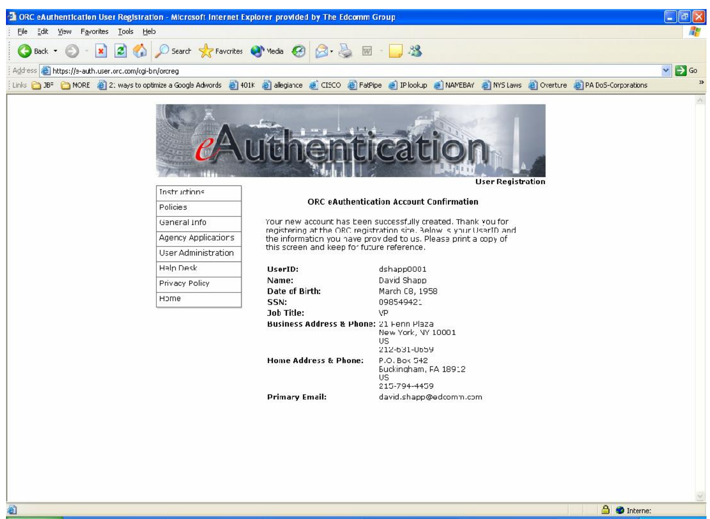
User Password screen



Complete all of the necessary fields and click the **Submit** button.

This will take you a **Confirmation** screen.

Confirmation screen



Note: You should record the User ID and password that you entered because you will need this information to **Register with Grants.gov**.

Once you have registered with ORC, Grants.gov's Credential Provider and receive your username and password, you will need to register with Grants.gov. After you have registered with Grants.gov, the E-Business Point of Contact listed on your organization's CCR registration will receive a notification stating that you have registered. The E-Business Point of Contact will then need to log into the Ebiz section of Grants.gov and assign the "Authorized Applicant" role to you. You will then be able to submit grants through Grants.gov.

If you forget your password

In the event that you forget your password, you can obtain a new password from the Credential Provider:

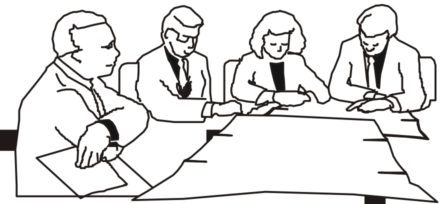
If you have forgotten your password, complete the following steps:

1) Browse to www.grants.gov.
2) Click the **Get Started** tab.
3) Click the **Register with the Credential Provider** link.
4) Click the **Credential Provider** link in the middle of the screen.
5) Enter your DUNS number. If you have a nine digit DUNS number, add four zeros to the end of it.
6) Click the **Register** button.
7) On the left of the screen, mouse over **User Administration**.
8) Select **Forgotten Password**.
9) Enter the username that you received from the Credential Provider
10) Click the **Login** button.
11) You will receive the question that you entered as your password reminder.
12) Enter the answer to the question in the **Answer** field.
13) Click the **Submit** button.
14) You will be prompted to enter a new password.

Once you enter a new password, Grants.gov's system will automatically be updated with the new password.

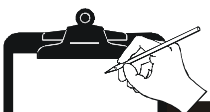
If you forget your username

please contact ORC, Grants.gov's Credential Provider at 800-386-6820 or via email at eauthhelp@orc.com. You may be required to re-register. If you are required to re-register with the Credential Provider, you will need to re-register your username and password with Grants.gov.



Key Points

- **Remember your username and password.**
- **Credential providers are necessary for security.**
- **Utilize customer support resources.**



My Notes

Practice 20: Registering with Grants.gov

Once you have registered with ORC, Grants.gov's Credential Provider and receive your username and password, you will need to register with Grants.gov. You should wait approximately 20 minutes after completing the Credential Provider registration before registering with Grants.gov.

After you have registered with Grants.gov, the E-Business Point of Contact listed on your organization's CCR registration will receive a notification stating that you have registered.

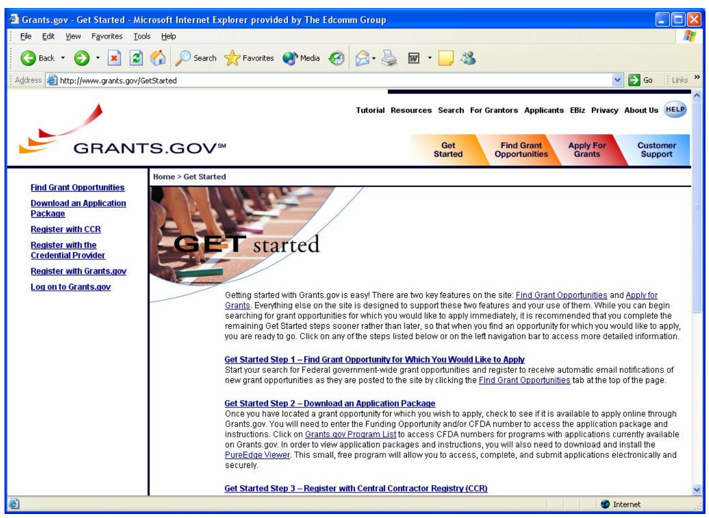
The E-Business Point of Contact will then need to log into the E-Biz section of Grants.gov and assign the "Authorized Applicant" role to you. Once E-Business Point of Contact completes this process, you will receive an email confirming that you can submit grants on behalf of your organization. You will then be able to submit grants through Grants.gov.

Registering with Grants.gov

To register, click the **Get Started** tab at the top of any screen.

This will take you to the **Get Started** screen.

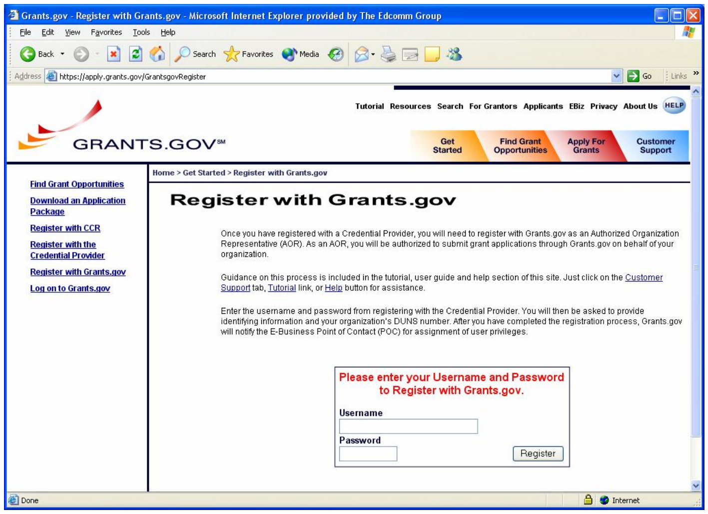
Get Started screen



Click the **Register with Grants.**gov link on the left of your screen.

This will take you to the **Register with Grants.gov** screen.

Register with Grants.gov screen



Enter the username you entered to register with a Credential Provider in the **Username** field.

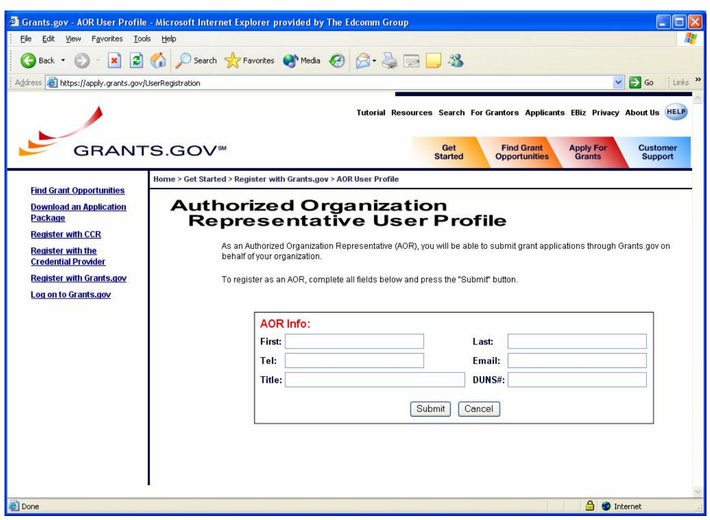
Enter the password you entered to register with a Credential Provider in the **Password** field.

> Remember – the password you received from the Credential Provider may contain both upper and lowercase letters. Be sure that you enter the exact password you received.

Click the **Register** button.

This will take you to the **Authorized Organization Representative User Profile** screen.

Authorized Organization Representative User Profile screen



Enter your first name in the **First** field.

Enter your last name in the **Last** field.

Enter your business telephone number in the **Tel** field.

Enter your business email address in the **Email** field.

Enter your title in the **Title** field.

Enter your DUNS number in the **DUNS#** field.

Click the **Cancel** button to return to the previous screen.

OR

Click the **Submit** button to register with Grants.gov.

After you have registered with Grants.gov, the E-Business Point of Contact listed on your organization's CCR registration will receive a notification stating that you have registered. The E-Business Point of Contact will then need to log into the Ebiz section of Grants.gov and assign the "Authorized Applicant" role to you.

Once the E-Business Point of Contact assigns the "Authorized Applicant" role to you, you will receive an email stating that you have been designated as an AOR and will be able to submit grants through Grants.gov.

If you forget your password

In the event that you forget your password, you can obtain a new password from the Credential Provider:

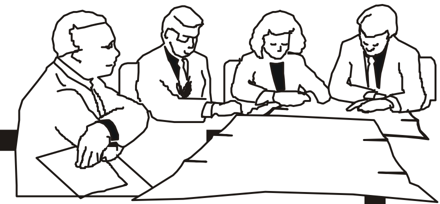
If you have forgotten your password, complete the following steps:

1) Browse to www.grants.gov.
2) Click the **Get Started** tab.
3) Click the **Register with the Credential Provider** link.
4) Click the **Credential Provider** link in the middle of the screen.
5) Enter your DUNS number. If you have a nine digit DUNS number, add four zeros to the end of it.
6) Click the **Register** button.
7) On the left of the screen, mouse over **User Administration**.
8) Select **Forgotten Password**.
9) Enter the username that you received from the Credential Provider
10) Click the **Login** button.
11) You will receive the question that you entered as your password reminder.
12) Enter the answer to the question in the **Answer** field.
13) Click the **Submit** button.
14) You will be prompted to enter a new password.

Once you enter a new password, Grants.gov's system will automatically be updated with the new password.

If you forget your username

If you forget your username, please contact ORC, Grants.gov's Credential Provider at 800-386-6820 or via email at eauthhelp@orc.com. You may be required to re-register. If you are required to re-register with the Credential Provider, you will need to re-register your new username and password with Grants.gov.



Key Points

- **Only AORs can submit applications.**
- **Anyone can find, download and complete applications.**
- **Utilize customer support resources.**

My Notes

Practice 21: Log on to Grants.gov

The For Applicants section of the site allows applicants to verify that they have registered with Grants.gov, to update their applicant profile, and to check a submitted application's status.

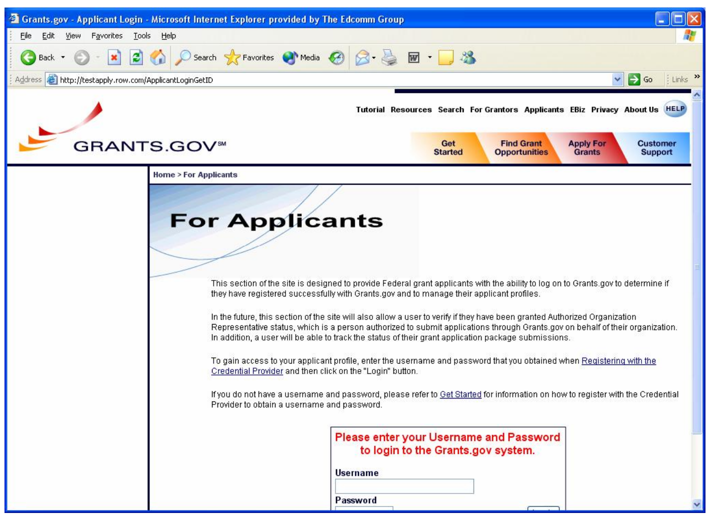
Log on to Grants.gov

To log into the For Applicants section of the site, click the **Applicants** link at the top of the screen.

You can also access this section of the site by clicking the **Get Started** tab and then clicking the **Log on to Grants.gov** link at the left of the Get Started screen.

This will take you to the **For Applicants Login** screen.

For Applicants screen



Enter the username you registered with Grants.gov in the **Username** field.

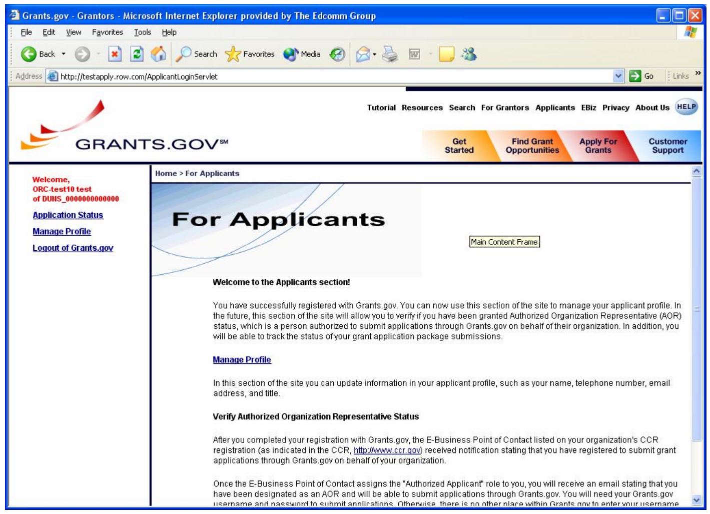
Enter the password you registered with Grants.gov in the **Password** field.

Click the **Login** button.

If you can successfully log into this section of the site, you have successfully registered with Grants.gov. This does **NOT**, however, indicate that you are an Authorized Organization Representative (AOR) for your organization and can submit applications on your organization's behalf. Once you have completed the Grants.gov registration, your organization's Ebiz Point of Contact will need to log into the Ebiz section of Grants.gov and designate you as an Authorized Applicant. You will receive an email stating that you have been designated as an AOR for your organization when your Ebiz Point of Contact assigns this role to you.

This will take you to the **For Applicants Welcome** screen.

For Applicants Welcome screen



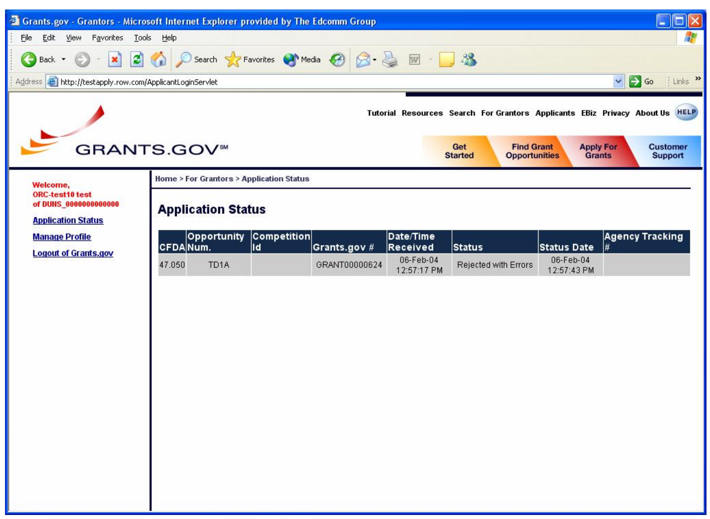
From this screen you can check a submitted application's status and update your applicant profile.

Checking a Submitted Application's Status

To check an application's status once you log into the For Applicants section of Grants.gov, click the **Application Status** link on the left of the screen.

This will take you to the **Application Status** screen.

Application Status screen



The **Application Status** screen displays all the grant applications that you have submitted using the username and password you entered when you logged into the For Applicants section of Grants.gov.

> The **CFDA** column displays the CFDA Number for the grant opportunities to which you have submitted an application.
>
> The **Opportunity Number** column displays the Funding Opportunity Number for the grant opportunities to which you have submitted an application.

The **Competition ID** column displays the Funding Opportunity Competition ID Number for the grant opportunities to which you have submitted an application.

The **Grants.gov #** column displays the Grants.gov Tracking Number assigned to each application.

The **Date/Time Received** column displays the dates and times that you submitted each application.

The **Status** column displays the status of the applications you have submitted.

- A status of **Received** indicates that Grants.gov has received the application, but the application is awaiting validation.
- A status of **Validated** indicates that Grants.gov validated the application and it is available for the agency to download.
- A status of **Received by Agency** indicates that the agency has confirmed receipt of the application package.
- A status of **Agency Tracking Number Assigned** indicates that the agency has assigned an internal tracking number to your application. This is the last status that Grants.gov tracks. Updates beyond this must be checked with the agency directly. Note: All agencies do not assign tracking numbers. If you do not see an agency tracking number, this does not infer that the agency did not receive or process your application. The assignment of tracking numbers is based on the policy of a particular agency.
- A status of **Rejected with Errors** indicates that Grants.gov was unable to process your application because of an error(s) and cannot accept the application until you correct the errors and successfully resubmit the application. You will receive email notification with information on how to address the error(s).

The **Status Date** column displays the date that the status was updated.

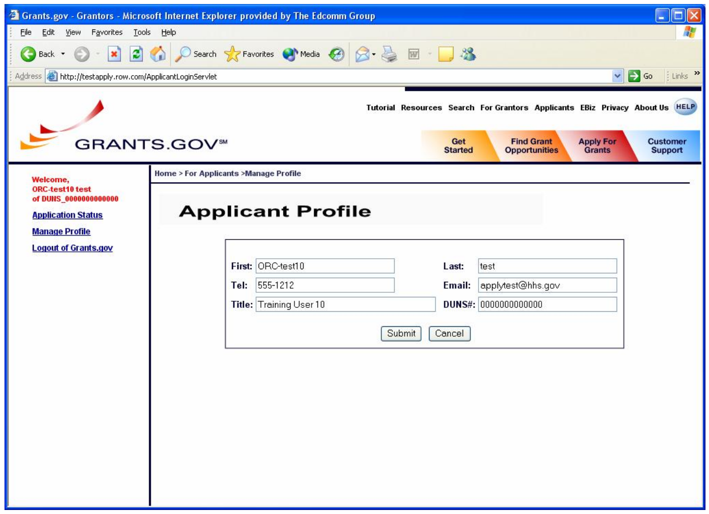
The **Agency Tracking #** field displays the tracking number that the grantor agency assigned for its internal tracking purposes to your submitted application. Note: All agencies do not assign tracking numbers. If you do not see an agency tracking number, this does not infer that the agency did not receive or process your application. The assignment of tracking numbers is based on the policy of a particular agency.

Managing Your Applicant Profile

To manage your applicant profile once you log into the For Applicants section of Grants.gov, click the **Manage Profile** link on the left of the screen.

This will take you to the **Manage Profile** screen.

Manage Profile screen



You can update any of the fields on this screen, **excluding** your DUNS number.

To save your revisions, click the **Submit** button. You will be taken to a **Registration Successful** screen.

OR

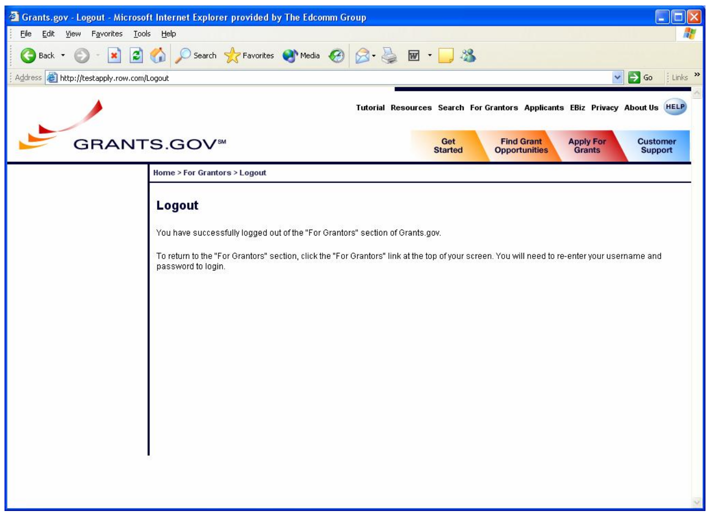
To return to the **For Applicants Welcome** screen without saving your revisions, click the **Cancel** button.

Logging Out of the For Applicants Section

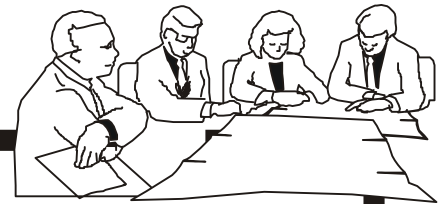
You can logout of the For Applicants section of Grants.gov at anytime by clicking the **Logout of Grants.gov** link on the left side of your screen.

This will take you to the **Logout** screen.

Logout screen



To log back in, simply click the **Applicants** link at the top of your screen.



Key Points

- **AORs can update their applicant profile.**
- **Applicants can check the status of their applications.**
- **Utilize customer support resources.**

My Notes

Practice 22: Designating AORs

Grants.gov has two essential roles for Authorized Applicants:

1) **E-Business Point of Contact** – this person is listed as the point of contact on the organization's CCR registration and is responsible for designating their organization's Authorized Organization Representatives (AORs). Organizations may have only one E-Business Point of Contact.

2) **Authorized Organization Representative (AOR)** – AORs are designated by the E-Business Point of Contact as someone who is authorized to submit applications to Grants.gov on behalf of their organization. AORs must register with Grants.gov's Credential Provider, Operational Research Consultants (ORC) so that Grants.gov can verify that they are who they claim to be and with Grants.gov. AORs must log into Grants.gov in order to submit an application. Organizations may have numerous AORs.

Once a potential Authorized Organization Representative (AOR) registers with a Credential Provider and Grants.gov, the E-Business Point of Contact will receive an email stating that someone has signed up to become an AOR for their organization.

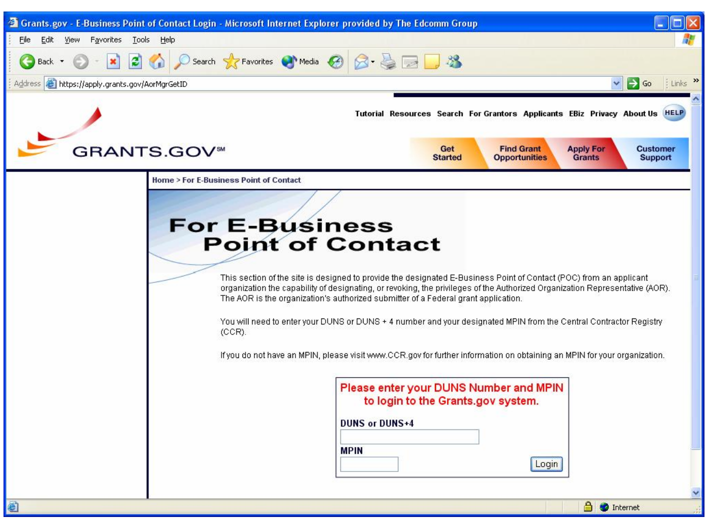
The E-Business Point of Contact will then need to assign the Authorized Applicant privilege to the registrant before that person can submit an application.

Logging into the Ebiz Section

To assign the Authorized Applicant role, click the **Ebiz** link at the top of your screen.

This will take you to the **Ebiz Login** screen.

Ebiz Login screen



NOTE – If this is your first time logging into the Ebiz section of Grants.gov, make sure that someone has already registered to become an AOR for your organization.

You will not be able to log into the Ebiz section of Grants.gov until one AOR has completed the Credential Provider and Grants.gov registration.

Enter your DUNS number that was entered in the CCR registration in the **DUNS** field.

Note – if you have a nine digit DUNS number, add four zeros to the end of it.

Enter the MPIN selected during the CCR registration in the **MPIN** field.

Remember – your MPIN is the nine character code that you chose when registering with CCR.

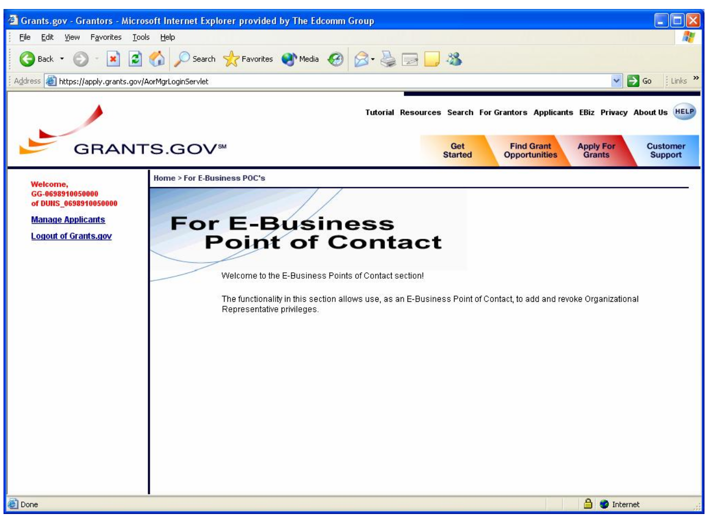
Click the **Login** button.

Assigning the Authorized Applicant Role

Log into the Ebiz section of Grants.gov.

This will take you to the **Ebiz Welcome** screen.

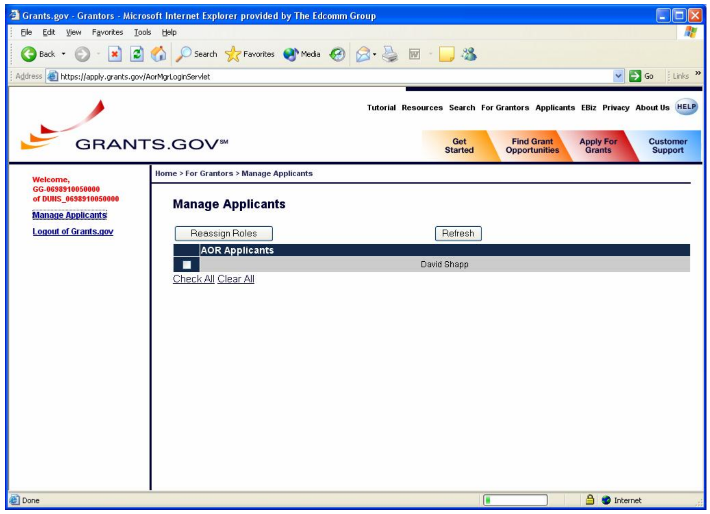
Ebiz Welcome screen



Click the **Manage Applicants** link on the left of the screen.

This will take you to the **Manage Applicants** screen.

Manage Applicants screen

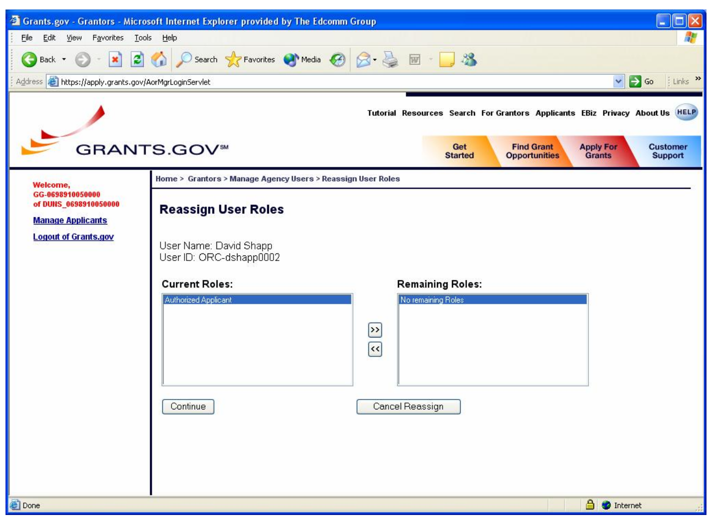


Select the name of the person for which you want to assign the Authorized Applicant role by clicking in the checkbox next to that person's name.

Click the **Reassign Roles** button.

This will take you to the **Reassign Roles** screen.

Reassign Roles screen



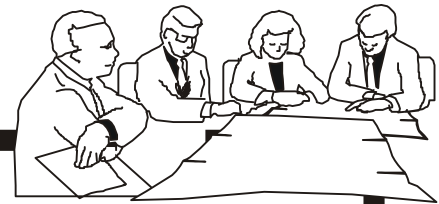
Select the **Authorized Applicant** role in the **Remaining Roles** box by clicking it.

Click the double arrow pointing toward the **Current Roles** box.

To save your changes, click the **Continue** button. The AOR will now be able to submit an application.

OR

To cancel your changes, click the **Cancel Reassign** button.



Key Points

- **AORs must be assigned the "Agency Applicant" role.**
- **The eBiz POC is the POC on the CCR registration.**
- **Utilize customer support resources.**

My Notes

Practice 23: Search Grant Synopses

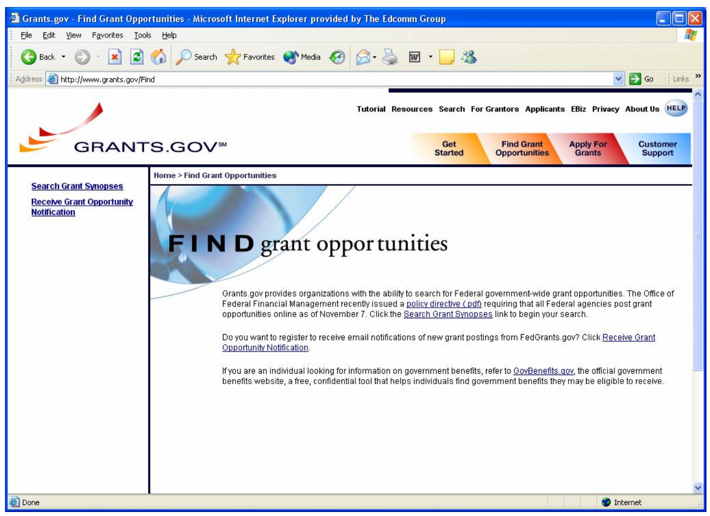
Grants.gov provides you with the ability to search for Federal government-wide grant opportunities. Click the "Search Grant Synopses" link on the left of the screen to begin your search.

Once you find an opportunity for which you wish to apply, you will need to record the Funding Opportunity Number or CFDA number and enter it manually on the **Download Application Packages** screen in the **Apply for Grants** section of this site.

To find grant opportunities, click the **Find Grant Opportunities** tab at the top of any screen.

This will take you to the **Find Grant Opportunities** screen.

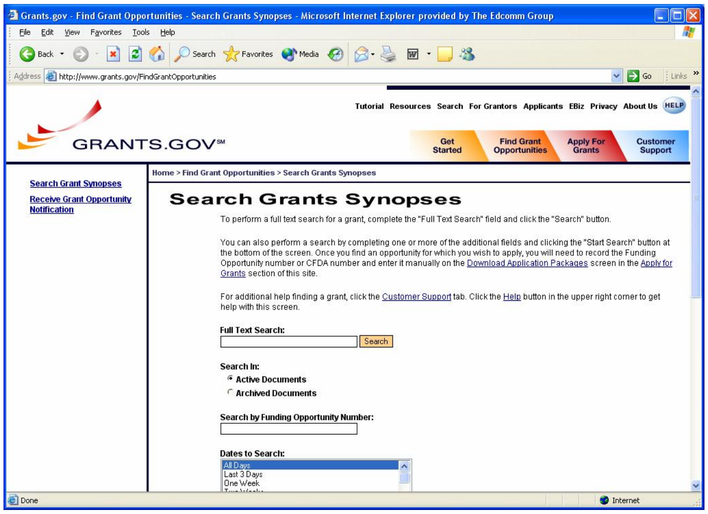
Find Grant Opportunities screen



Click the **Search Grant Synopses** link on the left of the screen.

This will take you to the **Search Grant Synopses** screen.

Search Grant Synopses screen



Complete as many of the fields as you can on this screen:

To search the full text of the posted grant opportunities, enter a word or phrase in the **Full Text Search** field. Click the **Search** button next to the **Full Text Search** field. Only use this Search button if you have entered something in the **Full Text Search** field.

You can also perform a search by completing one or more of the additional fields and clicking the **Start Search** button at the bottom of the screen.

Select whether you want to search **Active Documents** or **Archived Documents** by clicking the radio button next to corresponding field. **Active Documents** are grant opportunities that are still available for applicants to submit applications. **Archived Documents** are opportunities that are no longer active for applicants to submit applications.

If you know the funding opportunity number, enter it in the **Search by Funding Opportunity Number** field. If you are not sure of the entire Funding Opportunity Number:

Use an asterisk * to replace one or more characters.

Use a question mark ? to replace one character.

Select the time period for which you want to search in the **Dates to Search** field.

If you know the offering agency's Catalog of Federal Domestic Assistance (CFDA) number, enter it in the **Search by CFDA Number** field. If you are not sure of the entire CFDA number:

Use an asterisk * to replace one or more characters.

Use a question mark ? to replace one character.

Select the funding activity category from the **Search by Funding Activity Category** field. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

Select the funding instrument type from the **Search by Funding Instrument Type** field. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

Select the offering agency from the **Search by Agency** field. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

You can also select the Offices for the grantor agency by clicking the **Show Offices for Selected Agencies** button. When you click this button, the screen will refresh and the agency offices will be listed at the bottom of the screen. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

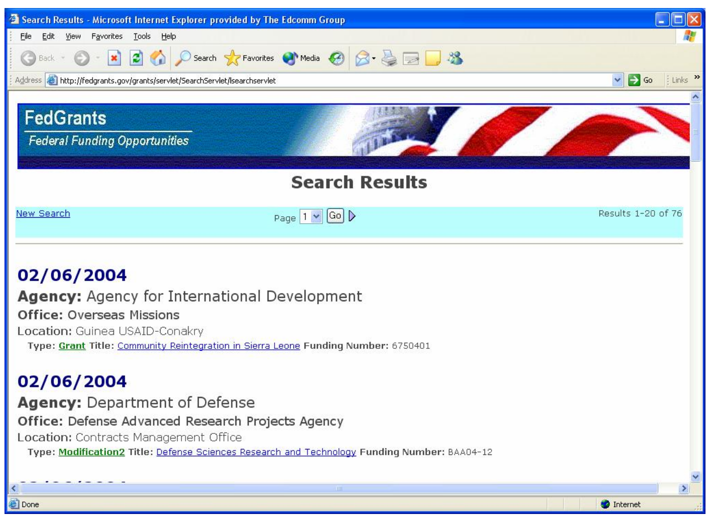
You can further select locations for the agency offices by clicking the **Show Locations for Selected Offices** button AFTER you have already clicked on the **Show Offices for Selected Agencies** button. When you click this button, the screen will refresh and the agency office locations will be listed at the bottom of the screen. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

To clear the **Grant Synopsis Search** form, click the **Clear Form** button.

Once you have entered in the necessary search criteria, click the **Start Search** button to begin the search.

Your search results will display on a **Search Results** screen at FedGrants.gov.

Search Results screen



Once you find an opportunity you wish to apply for, you will need to record the **Funding Opportunity Number** or **CFDA Number** and then enter it manually when you apply for the grant.

The Funding Opportunity Number is located in the description on the **Search Results** screen.

The CFDA Number can be found by clicking the **Grant** link next to the **Type** field for a specific opportunity no the **Search Results** screen.

You can also click the **Apply for Grant Electronically** button in the Grant Announcement to automatically search for the application package for that specific grant. Simply click the **Grant** link on the **Search Results** screen. Then click the **Apply for Grant Electronically** button at the bottom of the screen. When you click this button, you will be taken to the **Selected Grant Applications for Download** screen which will list any available application packages for the grant.

Search Tips

On some browsers, it may be necessary to hold down the **CONTROL** or **SHIFT** key to select multiple items.

MAC users should use the **APPLE** key to mark multiple items.

The following wildcard characters, symbols that stand for one or more unspecified characters, may be used to search by Full Text, Funding Opportunity or CFDA number:

use '*' to replace 1 or more characters at the end of the term

use '?' to replace any 1 character

When searching by Full Text, the following boolean operators (OR, AND, and NOT) may be used:

Operator OR (space is also considered as OR). Results a match if term1 OR term2 appears in the document.

Usage: Using OR: "term1 OR term2", Using space: "term1 term2"

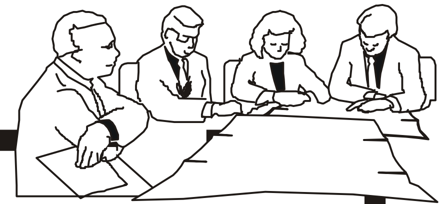
Operator AND (+ is also considered as AND). Results a match if both term1 AND term2 appears in the document

Usage: Using AND: "term1 AND term2", Using + sign: "+term1 +term2"

Operator NOT (- is also considered as NOT). Results a match if term1 appears in the document AND term2 dose NOT appears in the document.

Usage: Using NOT: "term1 NOT term2", Using - sign: "term1 -term2"

Notice: All boolean operators have to be in UPPER CASE letters



Key Points

- **Complete as many fields as possible to get best results.**
- **Record Funding Opportunity Number or CFDA.**
- **Utilize customer support resources.**

My Notes

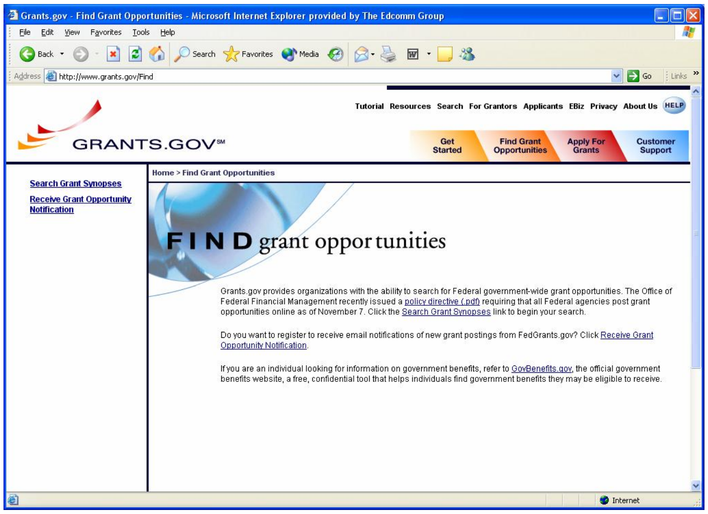
Practice 24: Receive Grant Notifications

You can sign-up to receive grant notifications through FedGrants.gov.

To sign-up for grant notifications, click the **Find Grant Opportunities** tab at the top of any screen.

This will take you to the **Find Grant Opportunities** screen.

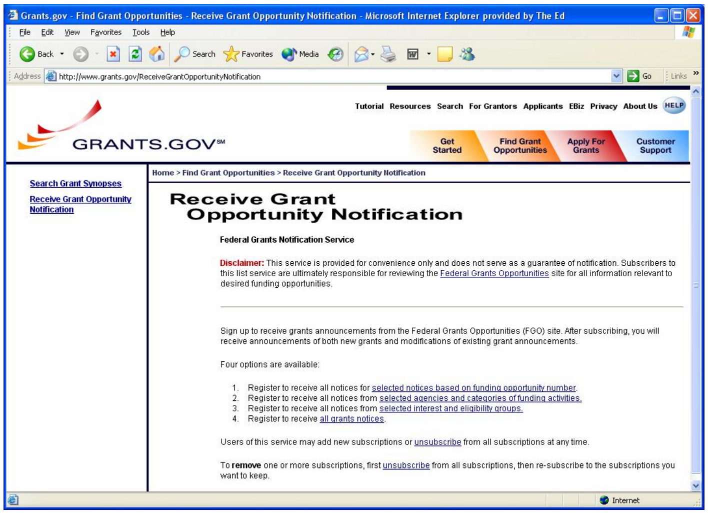
Find Grant Opportunities screen



Click the **Receive Grant Opportunity Notification** link on the left of the screen.

This will take you to the **Receive Grant Opportunity Notification** screen.

Receive Grant Opportunity Notification screen



Determine which notification option you would like to use and click the corresponding link:

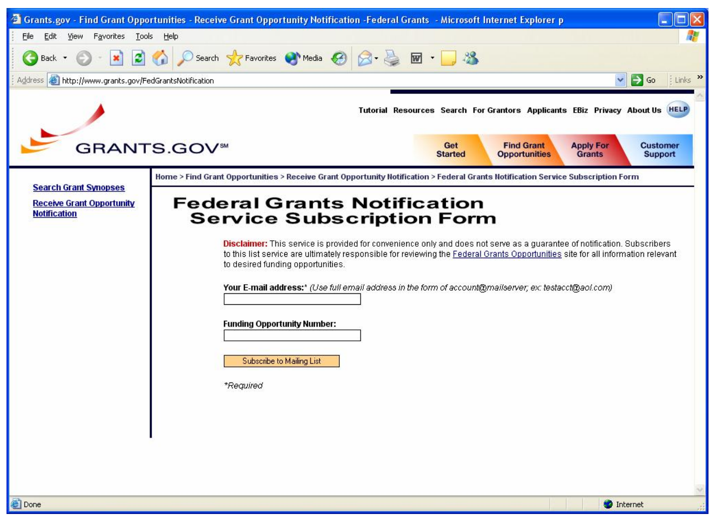
- Register to receive all notices for selected notices based on funding opportunity number.
- Register to receive all notices from selected agencies and categories of funding activities.
- Register to receive all notices from selected interest and eligibility groups.
- Register to receive all grants notices.

Register to receive all notices for selected notices based on funding opportunity number

Click the link at the end of option 1.

This will take you to the **Federal Grants Notification Service Subscription Form** screen.

Federal Grants Notification Service Subscription Form screen



Enter you email address in the **Email Address** field.

Enter the funding opportunity number for which you would like to receive notifications in the **Funding Opportunity Number** field.

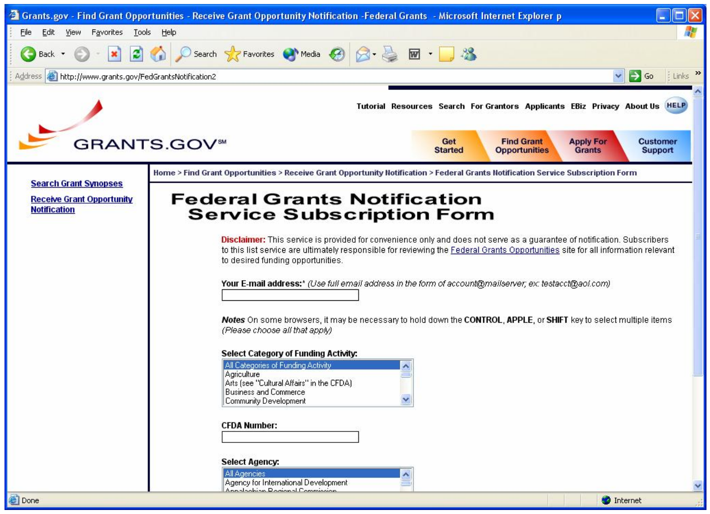
Click the **Subscribe to Mailing List** button.

Register to receive all notices from selected agencies and categories of funding activities

Click the link at the end of option 2.

This will take you to the **Federal Grants Notification Service Subscription Form** screen.

Federal Grants Notification Service Subscription Form screen



Enter you email address in the **Email Address** field.

Select the categories for which you would like to receive notification by clicking them from the **Select Category of Funding Activity** box. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

Enter a CFDA number for which you would like to receive notification in the **CFDA Number** field.

Select the agencies for which you would like to receive notification by clicking them from the **Select Agency** box. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

You can also select the Offices for the grantor agency by clicking the **Show Offices for Selected Agencies** button. When you click this button, the screen will refresh and the agency offices will be listed at the bottom of the screen. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

You can further select locations for the agency offices by clicking the **Show Locations for Selected Offices** button AFTER you have already clicked on the **Show Offices for Selected Agencies** button. When you click this button, the screen will refresh and the agency office locations will be listed at the bottom of the screen. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

Click the **Subscribe to Mailing List** button.

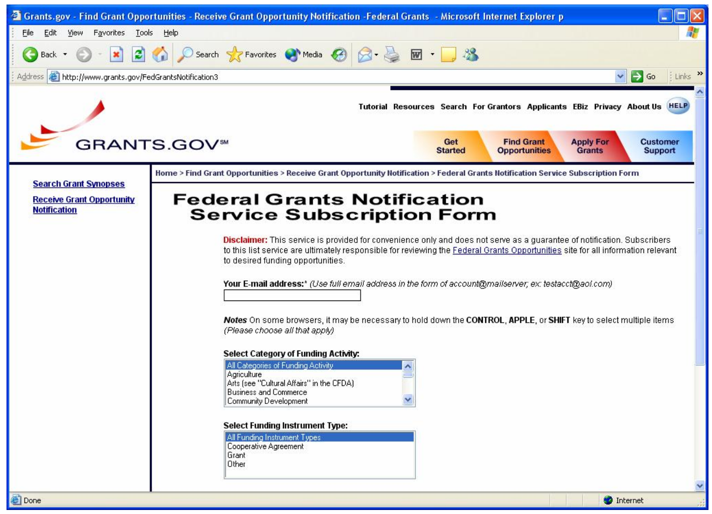
To clear the form, click the **Clear Form** button.

Register to receive all notices from selected interest and eligibility groups

Click the link at the end of option 3.

This will take you to the **Federal Grants Notification Service Subscription Form** screen.

Federal Grants Notification Service Subscription Form screen



Enter you email address in the **Email Address** field.

Select the categories for which you would like to receive notification by clicking them from the **Select Category of Funding Activity** box. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

Select the funding instrument types for which you would like to receive notification by clicking them from the **Select Funding Instrument Type** box. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

Select the eligible applicants for which you would like to receive notification by clicking them from the **Select Eligible Applicants** box. If you want to select multiple items in this list, hold down the **CONTROL** or **SHIFT** keys. Mac users should hold the **APPLE** key.

Enter a CFDA number for which you would like to receive notification in the **CFDA Number** field.

Click the **Subscribe to Mailing List** button.

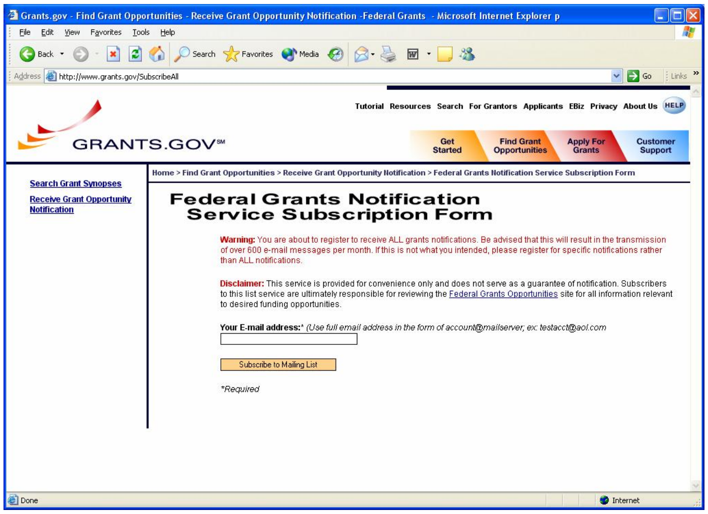
To clear the form, click the **Clear Form** button.

Register to receive all grants notices.

Click the link at the end of option 4.

This will take you to the **Federal Grants Notification Service Subscription Form** screen.

Federal Grants Notification Service Subscription Form screen



Enter you email address in the **Email Address** field.

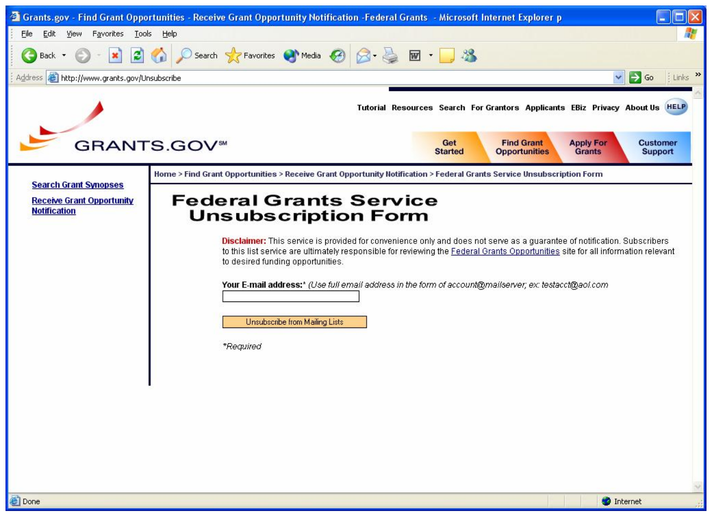
Click the **Subscribe to Mailing List** button.

Unsubscribing from Notifications

To unsubscribe from notifications, click the **Unsubscribe** link on the **Receive Grant Opportunities** screen.

This will take you to the **Federal Grants Service Unsubscription** Form

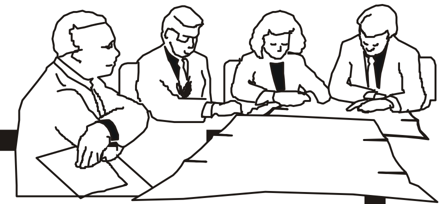
Federal Grants Service Unsubscription Form screen



Enter you email address in the **Email Address** field.

Click the **Unsubscribe from Mailing Lists** button.

> **Note** - To remove 1 or more subscriptions, first unsubscribe from all subscriptions, then re-subscribe to the subscriptions you want to keep.



Key Points

- **Sign up to receive grant notifications.**
- **Choose the option that meets your preferences.**
- **Utilize customer support resources.**

My Notes

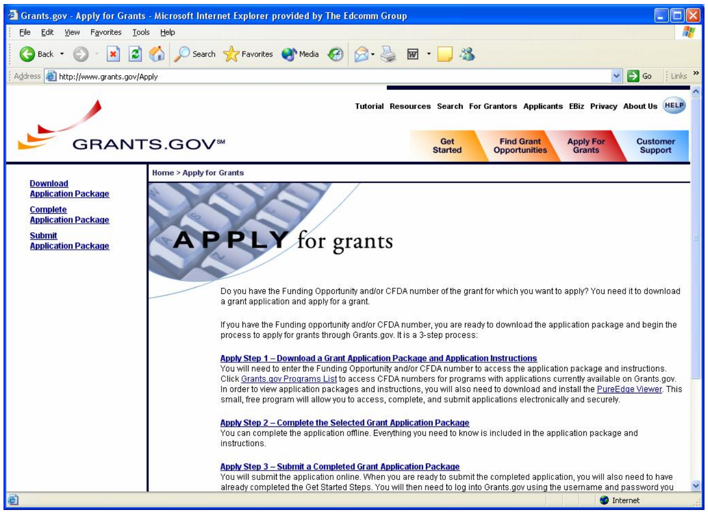
Practice 25: Downloading Application Packages

Before applying for a grant, make sure that you have already completed the "Get Started" steps: Download the Application Viewer, Request a DUNS and then Register with CCR, a Credential Provider and Grants.gov. You will not be able to submit an application if you have not completed all of these steps.

When you have completed all of the necessary steps prior to beginning the application process, click the **Apply for Grants** tab at the top of your screen.

This will take you to the **Apply for Grants** screen.

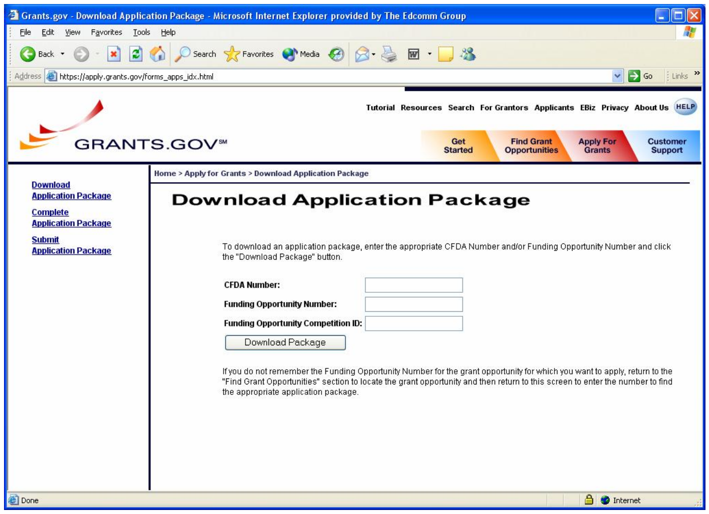
Apply for Grants screen



Click the **Download Application Package** link on the left of your screen.

This will take you to the **Download Application Package** screen.

Download Application Package screen



Enter the CFDA number of the agency which is offering the opportunity for which you want to apply in the **CFDA Number** field.

OR

Enter the Funding Opportunity Number of the opportunity for which you want to apply in the **Funding Opportunity Number** field.

OR

Enter the Funding Opportunity Competition ID Number of the opportunity for which you want to apply in the **Funding Opportunity Competition ID Opportunity Number** field.

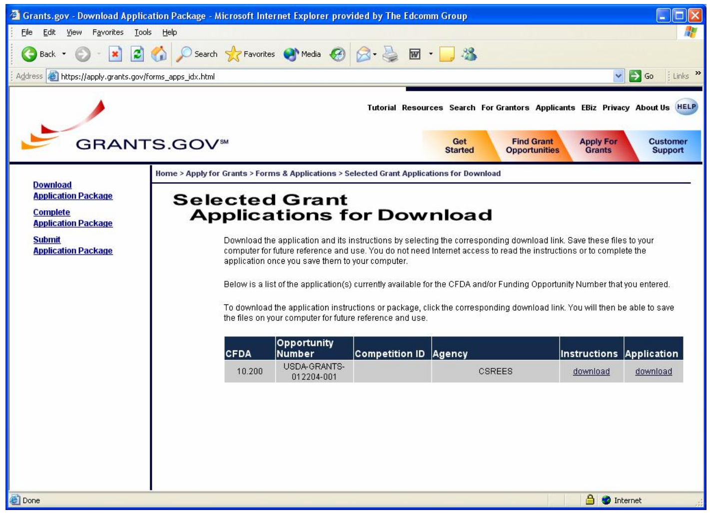
> If you do not know the Funding Opportunity Number, CFDA Number or Funding Opportunity Competition ID Number for the grant for which you want to apply, you will need to search for the grant opportunity using the **Search Grant Synopses** screen. Refer to the **Search Grant Synopses** topic for details on completing this search. You can also refer to the **Grants.gov Programs List** which provides information on CFDA numbers for programs with applications currently available on Grants.gov.

You must complete at least one of these fields to download an application.

Click the **Download Package** button to download the application package.

This will take you to the **Selected Grant Applications for Download** screen.

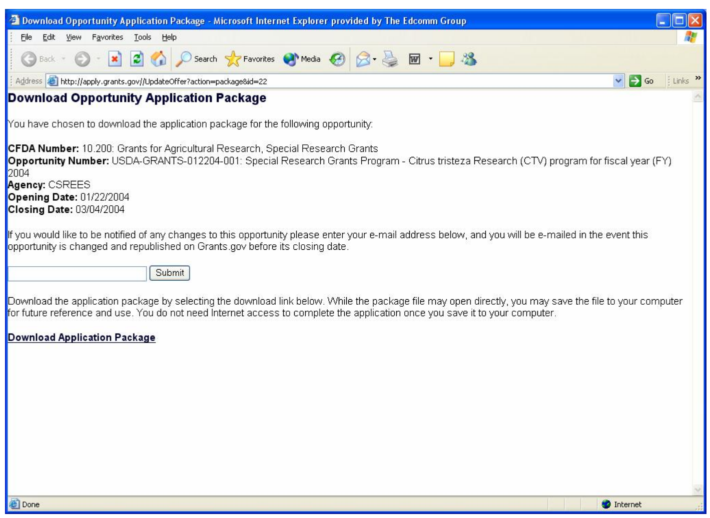
Selected Grant Applications for Download screen



To download an application package and its instructions, click the corresponding download link. Be sure to download both.

When you download an application package or instructions, you will first be taken to the **Download Opportunity Application Package** or the **Download Opportunity Application Instructions** screen.

Download Opportunity Application Package screen



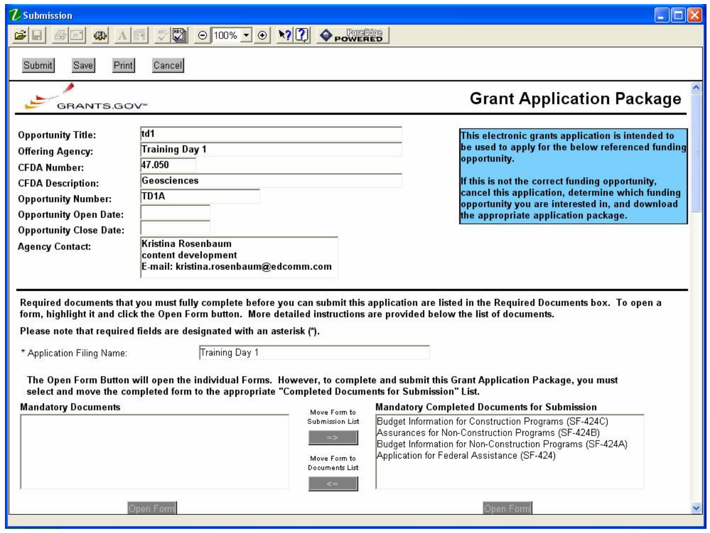
Confirm that you are downloading the correct application/instructions for the grant for which you want to apply.

> If you would like to be notified of any changes to this opportunity, enter your email address in the field and then click the **Submit** button.
>
> If you do not enter your email address and the application package is deleted or modified, Grants.gov may reject the application.

Click the **Download Application Package** link.

The application package will open in the PureEdge Viewer.

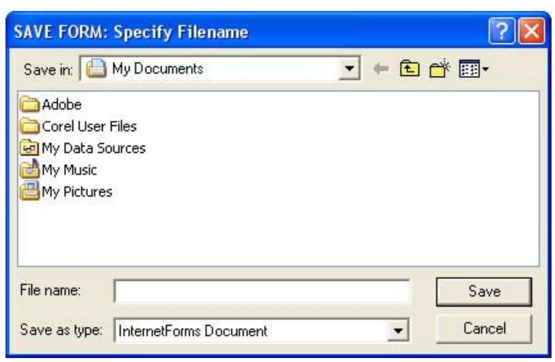
Application Package screen



Click the **Save** button to save the application to your computer. Note: A warning message appears informing you that one or more of the items in this form contains an invalid value and asks if you want to proceed anyway. Click **Yes**.

This will open the **Save Form** window.

Save Form window



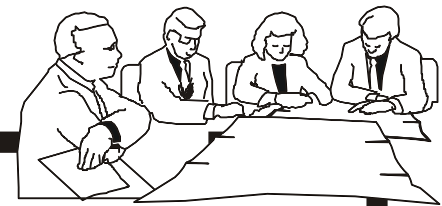
Browse to where you want to save the application on your computer.

Enter the name that you want the application to be saved as in the **File name** field.

Click the **Save** button.

The application will save to your computer.

You will not need to be online to complete the application.



Key Points

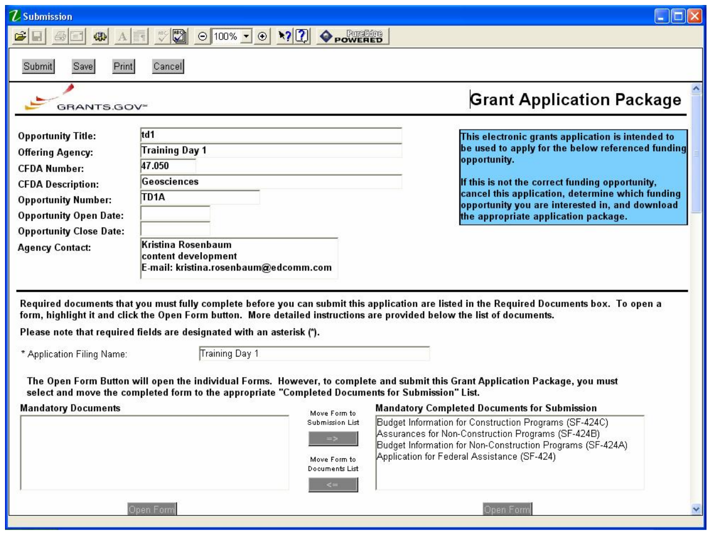
- **Funding Opportunity Number or CFDA required.**
- **Download package and instructions.**
- **Utilize customer support resources.**

My Notes

Practice 26: Completing Application Packages

When the application downloads, it will automatically open in PureEdge Viewer. You should save the application to your computer. Once the application is saved, you will not need to be online to complete the application.

Sample Application Package



Verify that the pre-entered information is for the grant opportunity for which you want to apply.

If the Federal funding opportunity listed is not the opportunity for which you want to apply, close this application package by clicking the **Cancel** button at the top of the screen. You will then need to locate the correct Federal funding opportunity, download its application and then apply.

If the Federal funding opportunity listed is the opportunity for which you want to apply, you will need to complete the application in its entirety before submitting it.

Applications can be completed in their entirety offline; however, you will need to login to the Grants.gov website during the submission process. The **Submit** button at the top of the screen will not be functional until the application is properly completed and saved.

If you have any application specific questions, you can contact the offering agency directly using the contact information provided on the application's cover page.

Completing the Cover Page

Enter a name for the application in the **Application Filing Name** field.

- This application can be completed in its entirety offline; however, you will need to login to the Grants.gov website during the submission process.
- You can save your application at any time by clicking the “Save” button at the top of your screen.
- The “Submit” button will not be functional until the application is complete and saved.

Open and complete all of the documents listed in the **Mandatory Documents** box and **Optional Documents** box.

- The documents listed in the **Mandatory Documents** box and **Optional Documents** may be predefined forms, such as SF-424, or documents that need to be attached, such as a program background statement. **Mandatory Documents** are required for this application. **Optional Documents** can be used to provide additional support for this application or may be required for specific types of grant activity. Reference the application package instructions for more information regarding **Optional Documents**.
- To open an item, simply click on it to select the item and then click on the **Open** button. When you have completed a form or document, click the form/document name to select it, and then click the **=>>** button. This will move the form/document to the **Mandatory Completed Documents** or **Optional Completed Documents** box for submission. To remove a form/document from the **Completed Documents** box, click the form/document name to select it, and then click the **<<=** button. This will return the form/document to the **Mandatory Documents** or **Optional Documents** box.
- When you open a required form, the fields which must be completed are noted by a *****, and on some computers (depending on your settings) highlighted in yellow. Optional fields and completed fields are displayed in white. If you enter invalid or incomplete information in a field, you will receive an error message once you have the field.
- To exit a form, click on the **Close** button at the top of the screen. Then, click the **Save** button to resave your entire application.

Forms

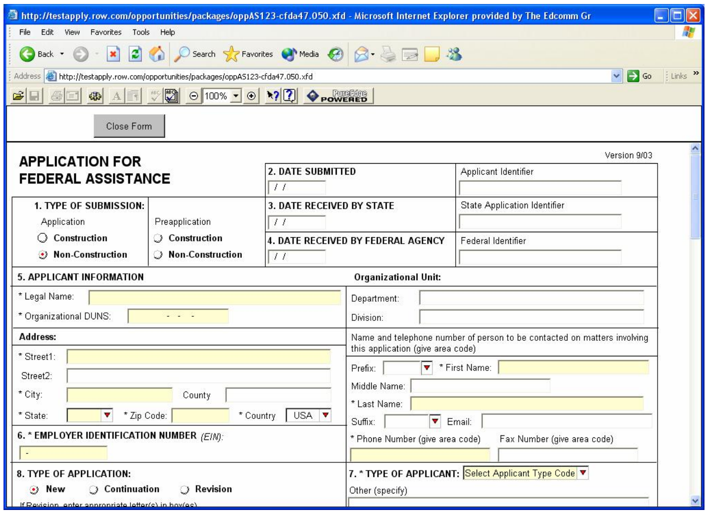
Forms, such as SF-424, are predefined and will require you to enter information into fields.

> NOTE – the DUNS number that is entered on the SF-424 must be the same DUNS number registered with the AOR who logins to submit the application will be submitting the application.

You should complete the SF-424 first, as it will automatically complete additional fields on other forms with the information you enter.

To open a form in the **Mandatory** or **Optional Documents** box, simply click on the form name to select it and click the **Open Form** button which appears below the appropriate box. When you have completed a form, you will need to move it to the appropriate **Completed Documents for Submission** box.

Sample Application Form



When you open a required form, all required fields are noted by an * and sometimes (depending on your computer settings) highlighted in yellow.

Optional fields and completed fields are displayed in white.

You can click any field to enter the necessary information.

You can also use the **TAB** button on your keyboard to move from field to field.

If you enter invalid or incomplete information in a field, you will receive an error message upon leaving the field.

To exit a form, click the **Close** button at the top of the screen. Then click the **Save** button to save your application.

Documents

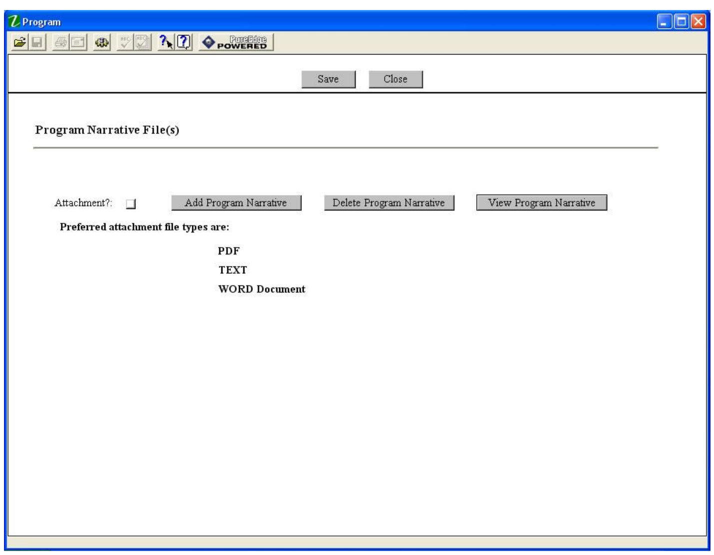
In addition to forms, application packages may also require that you submit specific documentation, such as a program background statement.

These documents may be submitted as a PDF, Text Document or Word Document.

To open a form that requires you to attach a document, simply click on the form name to select it and click the **Open Form** button which appears below the appropriate box. When you have completed a form, you will need to move it to the appropriate **Completed Documents for Submission** box.

When you open a form, you will be able to attach documents from your computer to it. You can only attach PDFs, Text Documents and Word Documents.

Sample Application Document



Attaching a Document

To upload a document, simply click the **Add** button.

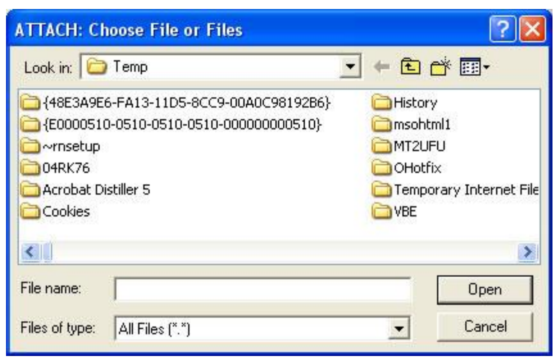
This will open an **Attachment** window.

Attachment window

Click the **Attach** button.

This will open a **Browse** window which will allow you to select the document on your computer which you want to upload.

Browse window



When you have selected the document you want to attach, click the **Open** button.

You will return to the **Attach** window.

Repeat this process until you have attached all of the necessary documents.

When you have selected all of the documents you want to include for this requirement, click the **Done** button.

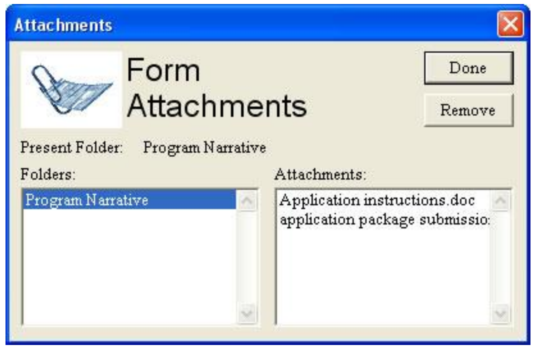
The box next to **Attachment** will be checked on the **Sample Application Document** screen.

Deleting a Document

To delete a document which you have uploaded, to the form, open the form, click the **Delete** button.

This will open the **Delete Attachment** window if multiple documents have been attached.

Delete Attachment window



Select the document which you want to delete and click the **Remove** button.

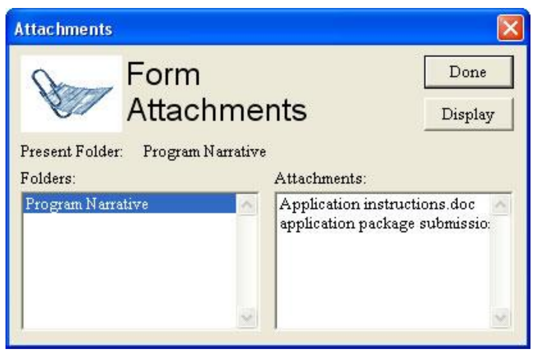
Click the **Done** button when you are finished deleting the documents. If only one attachment, press delete button. Remove attachment box appears. Click "**Yes**" to delete or "**No**" to return back to the form. Once all the attached documents have been removed, the check mark after the attachment will be removed.

Viewing a Document

To view a document which you have uploaded, simply click the **View** button.

If only one document was attached the document will open. If multiple documents are attached, the **View Attachment** window will open.

View Attachment window



If you have uploaded more than one document you will need to select the document which you want to view and click the **Display** button.

Click the **Done** button to return back to the form without displaying the attachment. Closing the open document, returns you back to the form.

To exit the mandatory documents page, click the **Close** button.

Saving Your Application

To save your application, simply click the **Save** button at the top of your screen.

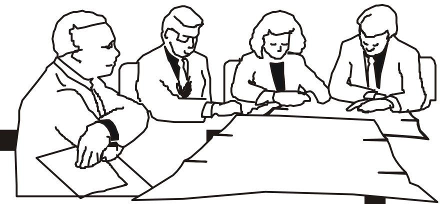
Printing Your Application

To print your application, simply click the **Print** button at the top of your screen.

Finalizing Your Application

You can save your application at any time by clicking the **Save** button at the top of your screen.

Once you have properly completed and saved the application, the **Submit** button will become active and you will be able to submit your application to Grants.gov.



Key Points

- **All mandatory (yellow) fields must be completed.**
- **Applications can be completed offline.**
- **Utilize customer support resources.**

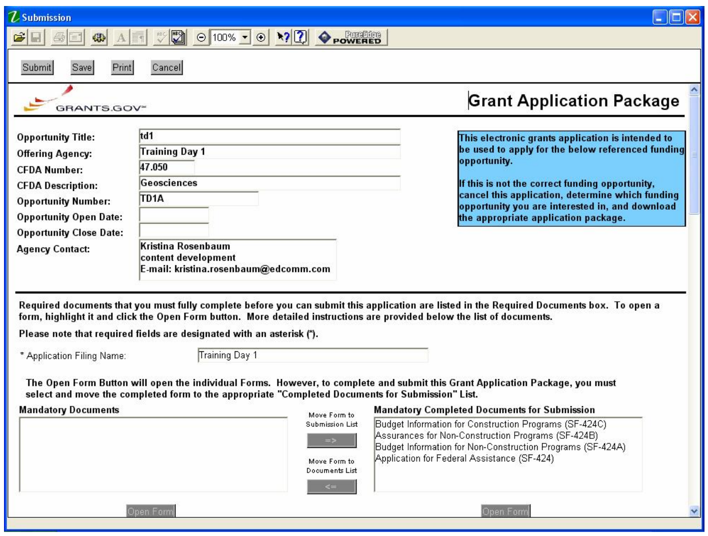
My Notes

Practice 27: Submitting Applications

Once you have completed an application, you will need to upload and submit the application. Although you can complete an application without being online, you will need to log into the Grants.gov website in order to submit the application.

The **Submit** button will become active after you have completed all required forms, attached all required documents, and saved your application package.

Sample Application Package

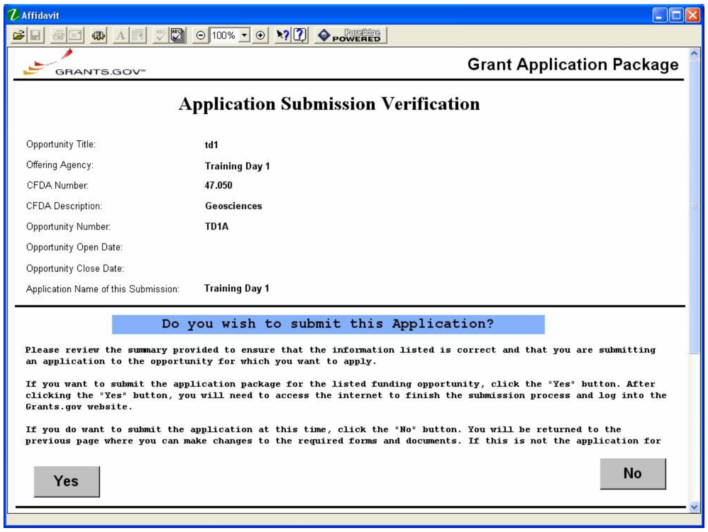


To upload and submit your application, click the **Submit** button at the top of the application package.

> **Note** - All required information must be entered, validated and saved to enable the **Submit** button.

This will take you to the **Summary** screen.

Summary screen



Review the application summary.

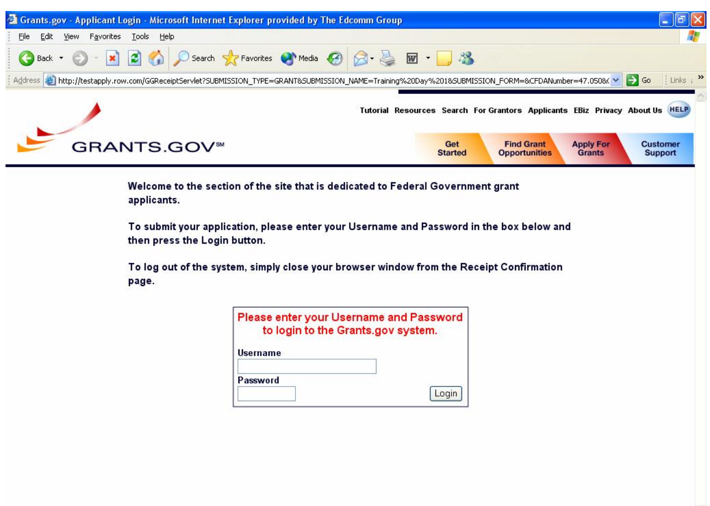
Click the **No** button if you do not want to submit the application. You will be returned to the application package where you can make changes to the forms.

OR

To submit the application, click the **Yes** button. At this point, your browser will open to the Grants.gov login page.

On the **Login** screen, you will need to enter the username and password that you used to register with a Credential Provider and with Grants.gov.

Login screen



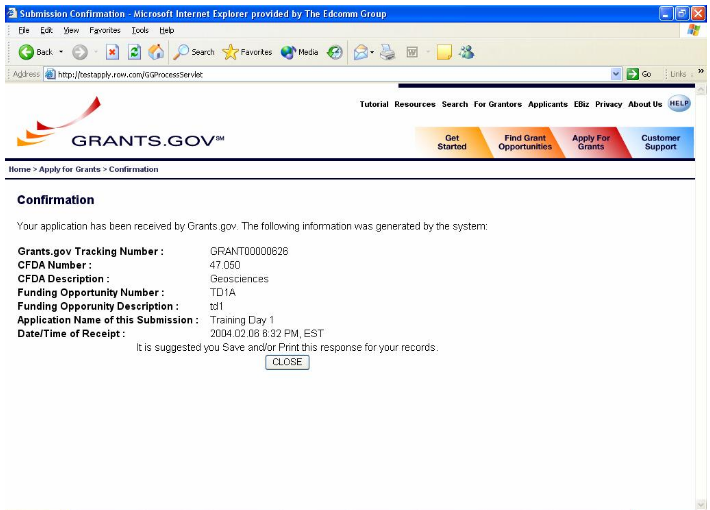
Enter your username in the **Username** field.

Enter your password in the **Password** field.

Click the **Login** button.

Once you have been authenticated, the application will be submitted. The **Confirmation** screen will then appear.

Confirmation screen



We recommend that you print this **Confirmation** screen.

You will receive an application submission confirmation email after the application has been properly uploaded.

This email will give you a **Grants.gov tracking number** which you will need to check the application's status.

Click the **Close** button.

If you forget your password

In the event that you forget your password, you can obtain a new password from the Credential Provider:

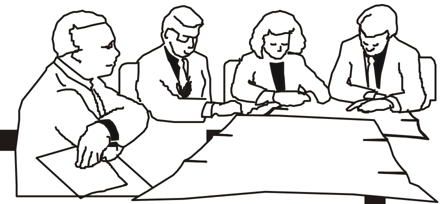
If you have forgotten your password, complete the following steps:

1) Browse to www.grants.gov.
2) Click the **Get Started** tab.
3) Click the **Register with the Credential Provider** link.
4) Click the **Credential Provider** link in the middle of the screen.
5) Enter your DUNS number. If you have a nine digit DUNS number, add four zeros to the end of it.
6) Click the **Register** button.
7) On the left of the screen, mouse over **User Administration**.
8) Select **Forgotten Password**.
9) Enter the username that you received from the Credential Provider
10) Click the **Login** button.
11) You will receive the question that you entered as your password reminder.
12) Enter the answer to the question in the **Answer** field.
13) Click the **Submit** button.
14) You will be prompted to enter a new password.

Once you enter a new password, Grants.gov's system will automatically be updated with the new password.

If you forget your username

If you forget your username, please contact ORC, Grants.gov's Credential Provider at 800-386-6820 or via email at eauthhelp@orc.com. You may be required to re-register. If you are required to re-register with the Credential Provider, you will need to re-register with Grants.gov using your new username and password.



Key Points

- **Login to submit application.**
- **Record Grants.gov Tracking number.**
- **Utilize customer support resources.**

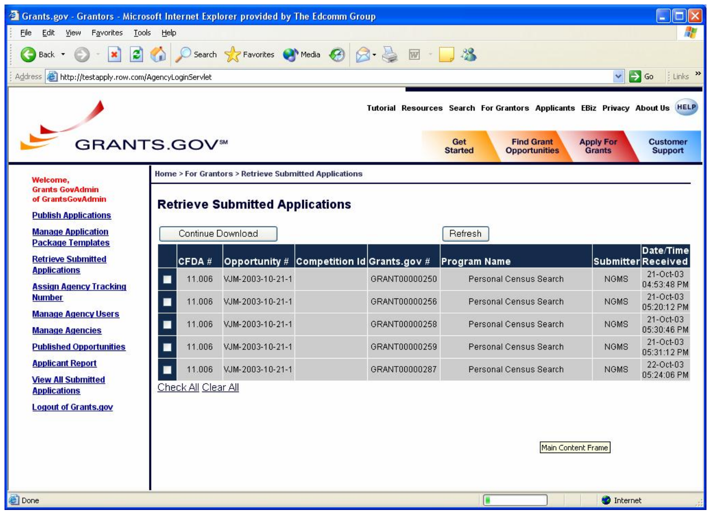
My Notes

Practice 28: Retrieve a Submitted Application

To retrieve and download the applications submitted to your agency, simply click the **Retrieve Submitted Applications** link on the left of your screen.

This will take you to the **Retrieve Submitted Applications** screen.

Retrieve Submitted Applications screen

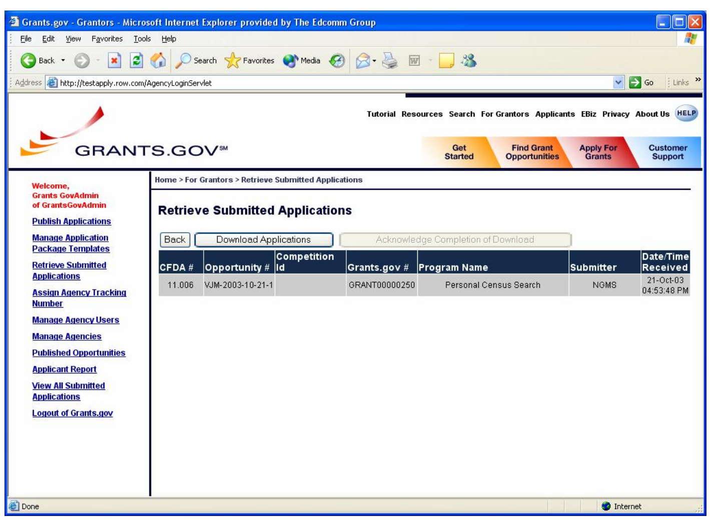


Select the applications that you want to download by clicking the checkbox in the corresponding application's row.

Click the **Continue Download** button to download the applications.

This will begin the retrieval process.

Retrieve Submitted Applications screen



To return to the previous screen without downloading the applications, click the **Back** button.

OR

To download the listed applications, click the **Download Applications** button.

This will open the **File Download** screen and you will be prompted to save the application to your computer.

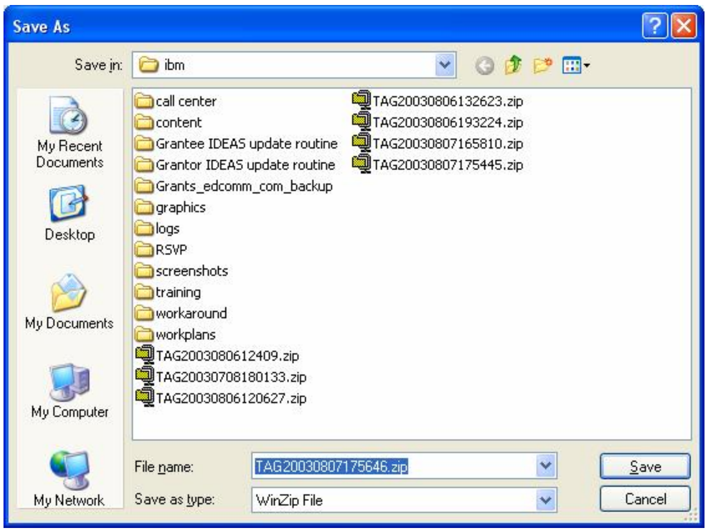
File Download screen

Click the **Save** button.

Note – if you click the **Open** button, the zip file will appear empty. You must save the application before opening it.

This will open the **Save As** window.

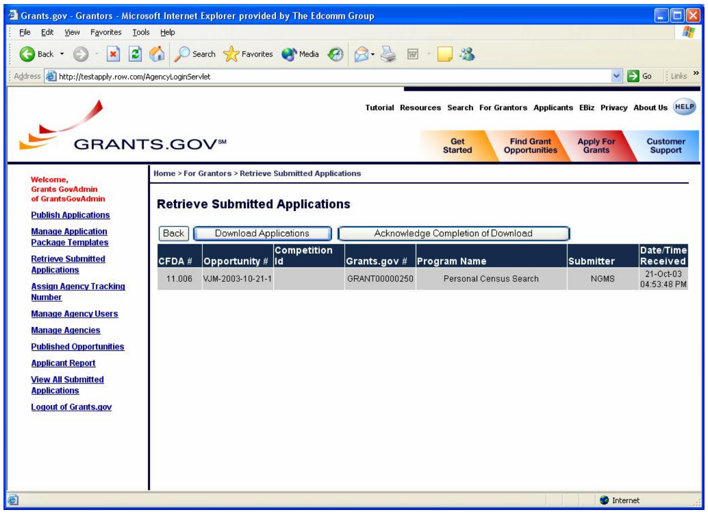
Save As window



Select the location where you want to save the application and click the **Save** button.

This will return you to the Retrieve Submitted Applications screen where the **Acknowledge Completion of Download** button will be active.

Retrieve Submitted Applications screen



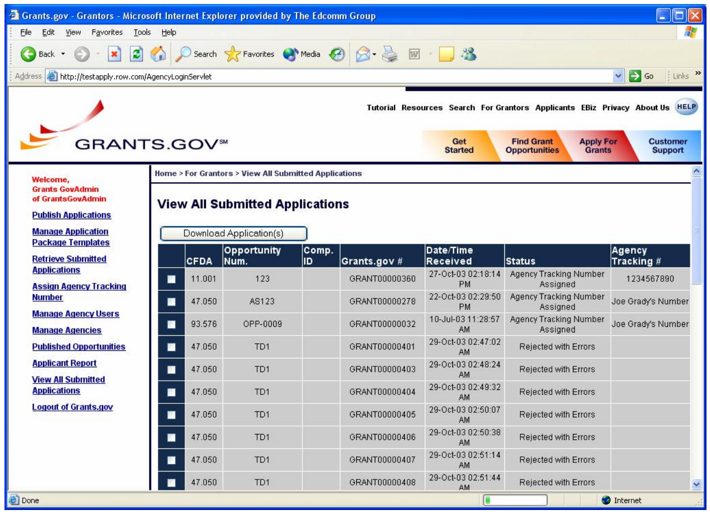
Verify that the application downloaded properly to your computer and then click the **Acknowledge Completion of Download** button. This will complete the download process and return you to the **Retrieve Submitted Applications** screen where the application will no longer appear.

Re-retrieving Applications

If you need to "re-retrieve" an application, simply click the **View Applications** link on the left of the screen.

This will take you to the **View Applications** screen where all applications submitted to your agency will be listed.

View Applications screen

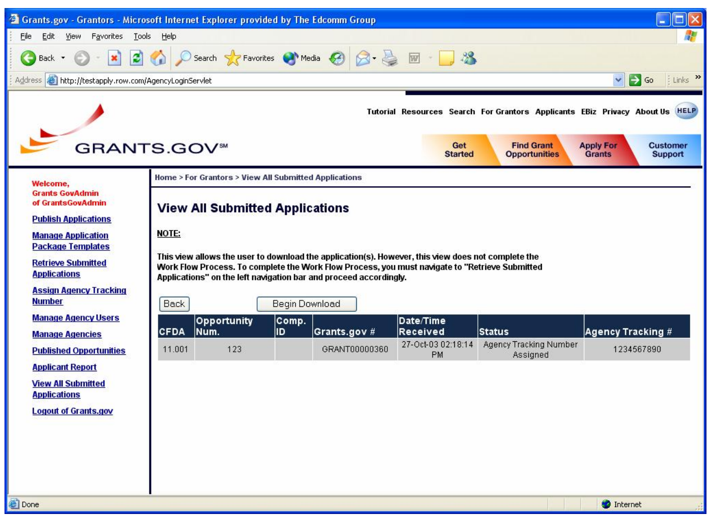


Select the applications that you want to download by clicking the checkbox in the corresponding application's row.

Click the **Download Applications** button to download the applications.

This will begin the retrieval process.

View All Submitted Applications screen



To return to the previous screen without downloading the applications, click the **Back** button.

OR

To download the listed applications, click the **Begin Download** button.

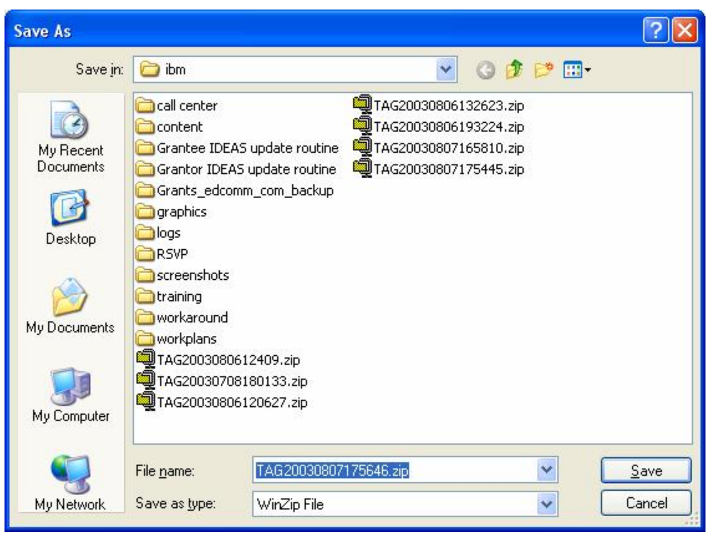
This will open the **File Download** screen and you will be prompted to save the application to your computer.

File Download screen

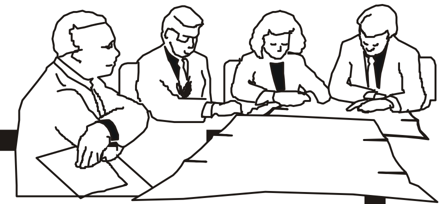
Click the **Save** button.

This will open the **Save As** window.

Save As window



Select the location where you want to save the application and click the **Save** button.



Key Points

- **Remember where you save the package.**
- **You can re-retrieve an application package.**
- **Utilize customer support resources.**

My Notes

Practice 29: Assign a Tracking Number

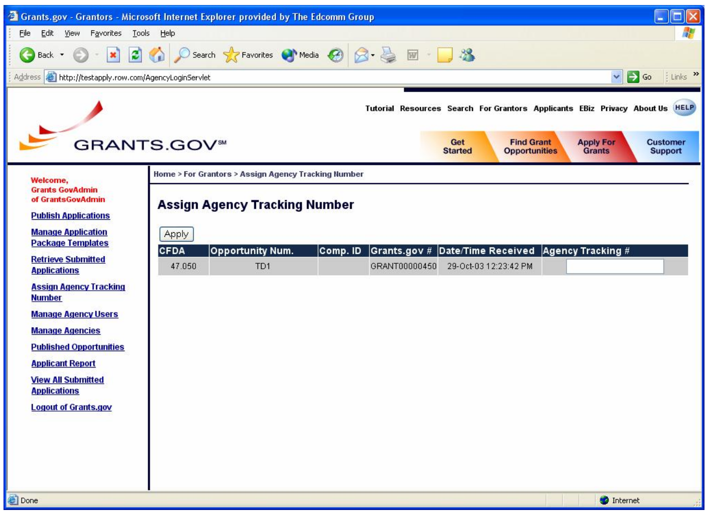
Assigning agency tracking numbers allows you to assign a unique number to a submitted application that your agency can use internally for application identification.

Before you can assign a tracking number, you will need to retrieve the submitted applications. This procedure can be found in the "Retrieving Submitted Applications" topic.

To view the submitted applications which need a tracking number assigned, click Assign Agency Tracking Number on the left of the screen.

This will open the **Assign Agency Tracking Number** screen.

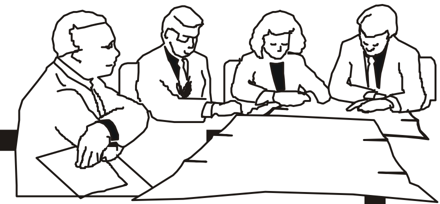
Assign Agency Tracking Number screen



This screen displays a list of the submitted applications which have not been assigned an agency tracking number.

To assign a tracking number to an application, simply enter a number in the **Agency Tracking #** field of that application's row.

Click the **Apply** button. The application will no longer appear on the list. You can view the change by clicking the **View Applications** link on the left of the screen.



Key Points

- **You can assign any agency tracking number.**
- **Click "Apply" to set an agency tracking number.**
- **Utilize customer support resources.**

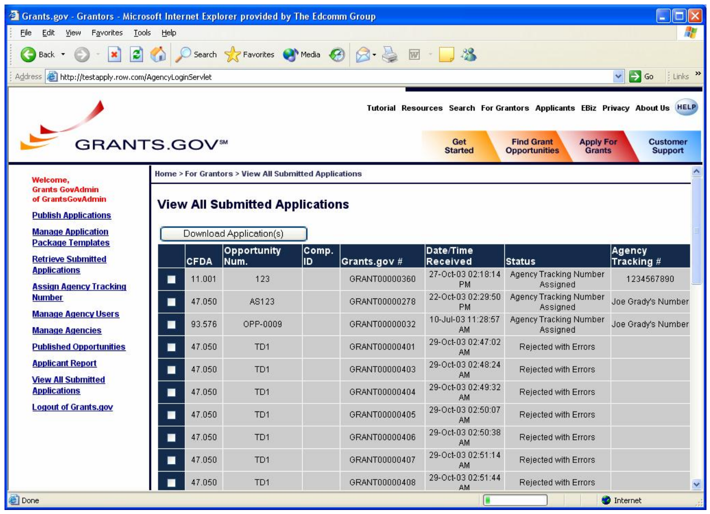
My Notes

Practice 30: View Submitted Applications

To view the applications submitted to the agency or agencies that you represent, click the **View All Applications** link on the left of your screen.

This will take you to the **View All Applications** screen.

View All Applications screen



You can also re-retrieve submitted applications from this screen. For more information, refer to the "Retrieving Submitted Applications" topic.

The **CFDA** column displays the CFDA Number for the grant opportunities to which applicants have submitted an application to your agency.

The **Opportunity Number** column displays the Funding Opportunity Number for the grant opportunities to which applicants have submitted an application to your agency.

The **Competition ID** column displays the Funding Opportunity Competition ID Number for the grant opportunities to which applicants have submitted an application to your agency.

The **Grants.gov #** column displays the Grants.gov Tracking Number assigned to each submitted application.

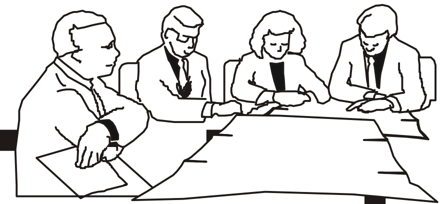
The **Date/Time Received** column displays the dates and times that each application was submitted.

The **Status** column displays the status of the all applications submitted to your agency.

- A status of **Received** indicates that Grants.gov has received the application, but the application is awaiting validation.
- A status of **Validated** indicates that Grants.gov validated the application and it is available for the agency to download.
- A status of **Received by Agency** indicates you have confirmed receipt of the application package.
- A status of **Agency Tracking Number Assigned** indicates that you have assigned an internal tracking number to the submitted applications.
- A status of **Rejected with Errors** indicates that Grants.gov was unable to process your application because of an error(s) and cannot accept the application until you correct the errors and successfully resubmit the application. You will receive email notification with information on how to address the error(s).

The **Status Date** column displays the date that the status was updated.

The **Agency Tracking #** field displays the tracking number that you have assigned for its internal tracking purposes to the submitted applications.



Key Points

- **You can re-retrieve applications from View Applications.**
- **All applications are listed on View Applications.**
- **Utilize customer support resources.**

My Notes

Wrap-Up

Module 1
Feedback and Discussion

Topic 1: Feedback and Discussion

Do you feel prepared to use Grants.gov?

What questions to you have?

1)

2)

3)

Module 2 Evaluation

Topic 1: Evaluation

In order to help us best address your needs in future training sessions, we ask that you answer the following questions.

1. Did this training session improve your understanding of Grants.gov? If yes, in what aspects?

2. What, if anything, would you change about this session?

3. What did you enjoy/not enjoy about this session?

4. Who else do you think would benefit from a session like this?

5. Additional comments about the session:

6. Additional comments about Grants.gov:

(Optional)

Name: ____________________________ Agency: ____________________________

Glossary

Grants.gov Glossary

This glossary can also be found by clicking the "Customer Support" tab and then the "Glossary" link.

Agency Specific Data Sets	Data that an agency collects in addition to data on any of the SF-424 series forms.
Application Package	A group of specific forms and documents for a specific funding opportunity which are used to apply for a grant.
Application Package Template	One or more forms and documents which can be reused for multiple opportunity-specific application packages.
Authorized Organization Representative (AOR)	A person with assigned privileges who is authorized to submit grant applications through Grants.gov on behalf of an organization.
Cage Code	A five character code which identifies companies doing, or wishing to do, business with the Federal Government assigned through the CCR.
Catalog of Federal Domestic Assistance (CFDA)	An online database of all Federal programs available to state and local governments, federally-recognized Indian tribal governments, territories and possessions of the United States, domestic public, quasi-public, and private profit and nonprofit organizations and institutions, specialized groups, and individuals.
Central Contractor Registry (CCR)	The primary database of vendors for the Department of Defense (DoD), NASA, Department of Transportation (DoT), and Department of Treasury which collects, validates, stores and disseminates data in support of agency missions.
Competition ID	A grantor selected ID that allows further distinction of the funding opportunity number which allows applications with the same funding opportunity number to be assigned unique identifiers.
Context-Sensitive Help	Online help which provides detailed information and instruction on a specific topic.
Credential Provider	The organization that validates the electronic identity of an individual through electronic credentials, PINS, passwords and PKI certificates for Grants.gov.
Data Universal Numbering System (DUNS)	A unique nine-character identification number provided by the commercial company Dun & Bradstreet (D&B).
E-Authentication	A gateway which provides access to numerous Credential Providers.

E-Business Point of Contact	An individual who is designated as the Point of Contact in the CCR registration. This person is responsible for assigning the "Agency Applicant" role to all AORs.
Fedgrants.gov	The current website at which you can search for grant opportunities.
Frequent Questions	A list of commonly asked questions and their answers.
Grants.gov	A “storefront” web portal for use in electronic collection of data (forms and reports) for Federal grant-making agencies through the Grants.gov site. (www.grants.gov).
Grants.gov Tracking Number	A number set used by Grants.gov which is used to identify each application it receives.
Inter-Agency Electronic Grants Committee (IAEGC)	An organization which encourages and assists federal agencies in developing electronic grants systems and standardizing electronic commerce methodologies throughout the federal government. The IAEGC is chartered to Grants.Gov Program Management Office.
Marketing Partner ID (MPIN)	A personal code that allows you to access other government applications such as the Past Performance Automated System, DoDBusOpps and TeDS. The MPIN may act as your password in these other systems. You make up the code and register it in CCR. The MPIN must have 9 digits containing at least one alpha character (must be in capital letters) and one number (no spaces or special characters permitted).
North American Industry Classification System (NAICS) Code	A code with a maximum of six digits used to classify business establishments. This code will be replacing the Standard Industrial Classification (SIC) code.
Operational Research Consultants (ORC)	The organization that Grants.gov has selected to validate the electronic identity of an individual through electronic credentials, PINS, passwords and PKI certificates.
Password	A secret code made up of user-selected numbers and letters used along with a username to log into Grants.gov.
Point of Contact (POC)	An individual who is designated as the person responsible for authorization and maintenance of information on behalf of a CCR registrant, coordinating communication among organizations.
PureEdge Viewer	A small, free program will allow you to access, complete and submit all application packages electronically and securely through Grants.gov.
Quick Reference	A job aid that will provide the information you likely will use most often.
Role Manager	The person listed as the Point of Contact for a specific grantor agency or sub-agency. This person will receive any email notifications about application submissions, depending on the option selected in the agency's profile.

SIC Code — Being replaced by the NAIC code, a code that was used to classify business establishments.

Standard Form 424 (SF-424) series forms — Standard government-wide grant application forms including:

SF-424 (Application for Federal Assistance cover page);

SF-424A (Budget Information – Non-construction Programs);

SF-424B (Assurances – Non-construction Programs;

SF-424C (Budget Information – Construction Programs); and

SF-424D (Assurances – Construction Programs).

Plus named attachments including Project Narrative and Budget Narrative.

System Requirements — Computer functionality and programming which is required in order for a specific program to operate.

Trading Partner Identification Number (TPIN) — The restricted access number assigned by CCR to the main CCR Point of Contact who manages information for the CCR registrant.

Tutorial — A computer-based training lesson, designed to teach you everything you need to know about using Grants.gov.

User Guide — A well indexed, comprehensive guide to reference information about Grants.gov.

User Name — The ID which allows access into specific sections of Grants.gov.