

Quick Sheet: Grant Notes

Audience: Grant Recipients

PURPOSE

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

STEPS

To view or add a Grant Note:

- 1. Log in to GrantSolutions.
- 2. The "My Grants List" screen appears. Locate the desired grant in which to add the note and click the **Grant Notes** link.

My Grants List		
The COE Training Center		Show Expired Grants
Grant Number:	90FO0012-01-00	View NGA
Grant Program:	FO - Fatherhood Reentry	<u>Grant Notes</u>
Program Office:	The Office of Family Assistance	Manage Amendments
Project Title:	Responsible Fatherhood Opportunities for Reentry and Mobility - 2015	
Award Issue Date: 2	11/12/2015	

QUICK SHEET: Grant Notes

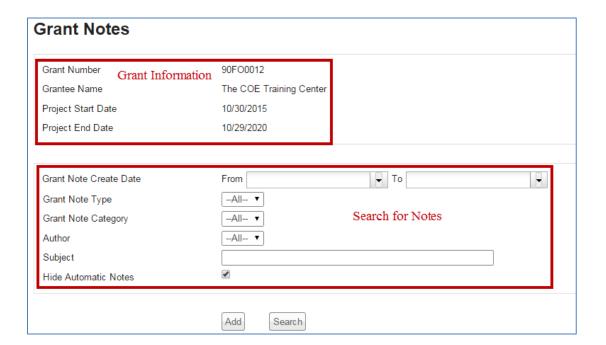


3. The "Grant Notes" screen appears in a new window.

The top portion of the screen contains the Grant information. The middle section contains search fields that may be used to locate specific Grant Notes. The search fields are populated from the previously added notes.

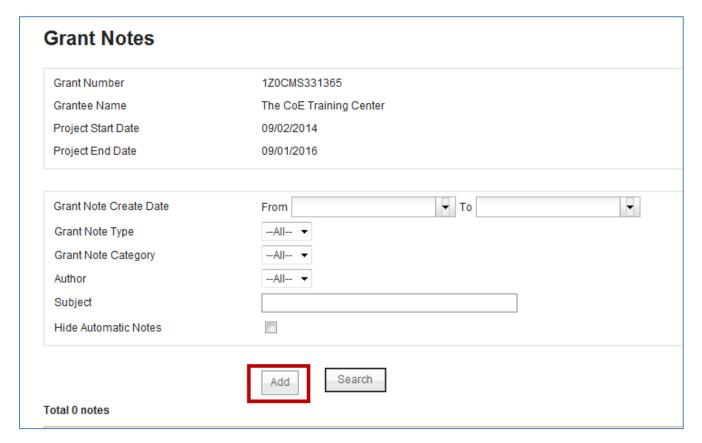
The search fields are:

- Grant Note Create Date: From and To dates
- Grant Note Type: Correspondence
- Grant Note Category: Pre-defined categories (populates with previously used categories)
- Author: Name of user that created the Grant Note
- Subject: Grant Note subject



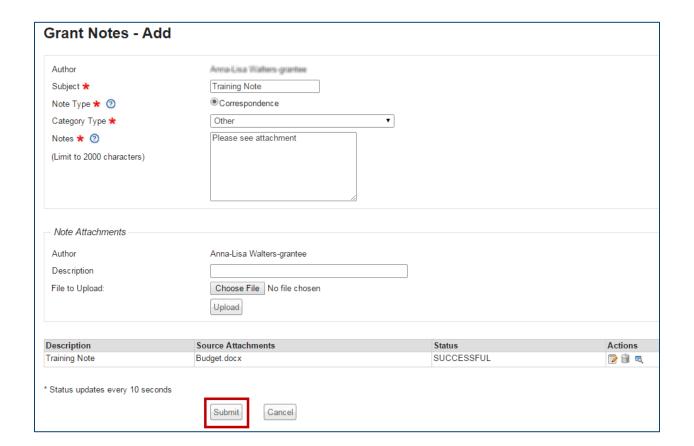


4. To add a new note, scroll down towards the bottom of the window and click the **Add** button.





- 5. The "Grant Note-Add" screen displays. Enter information in the required fields (indicated by a red asterisks).
 - Subject: Enter the subject of the note. Conform to any naming conventions
 - Note Type: Correspondence is the only option and is automatically selected
 - Category Type: Select from the pre-set list of categories
 - Notes: Enter the note text (limit of 2000 characters)
 - Note Attachments (Optional): Attach one or more files by entering a file description and uploading desired attachments
- 6. When done, click the Submit button.





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

When the automatically generated email notification is sent to the assigned Principal Investigator/Program Director and Grantee Authorizing Official, the Grant Note is not contained in the body of the email. The user must log into the GrantSolutions GMM to view the Grant Note.

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



8. Click the Cancel button to close the window and return to the "My Grants List" screen.

