Grants.gov Workspace Overview

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TRAINING SESSION OVERVIEW

- Grants.gov
- Benefits of Workspace
- Grants.gov Workspace Overview
- Live-Demonstration of Workspace
- Questions

***NCURA 59th Annual Meeting Grants.gov Workspace PowerPoint August 8, 2017***
Grants.gov is the electronic system used to find and submit grant applications to over 1,000 grant programs for all federal agencies.

It is the federal government’s central portal for grant announcements and submissions.
Finding Grant Opportunities
https://www.grants.gov/web/grants/home.html

Applying for Grant Opportunities
https://www.grants.gov/web/grants/applicants/apply-for-grants.html
# Searching for an Opportunity

<table>
<thead>
<tr>
<th>Search Method</th>
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<tr>
<td>Basic Search by keyword, funding opportunity number, or CFDA number</td>
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<tr>
<td>Browse by Funding Instrument Type</td>
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<td>Browse by Eligibility</td>
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<tr>
<td>Browse by Category</td>
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<td>Browse by Agency</td>
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SEARCHING TIPS

- If your search includes multiple words, use quotation marks to separate words. For example use “health” “Louisiana”.

- Asterisks can be used to replace one or more characters in a search. If you typed “National*”, the results would contain links to all grant opportunities with phrases that include National.

- Question marks can be used to replace any single character except the first one. If you typed “bl?ck”, the results would contain links to grant opportunities with phrases that contain “block” or “black.”
FINDING THE APPLICATION

- On the Grants.gov home screen select the “SEARCH GRANTS” tab
- Search and find appropriate opportunity
- Select the “APPLICATION PACKAGE” tab
- At the bottom of the screen, download the application and save the PDF on your computer
- If an application is not available, follow the instructions provided by the sponsor
While all federal agencies publish their funding opportunities on Grants.gov, these federal agencies set their own policies and application requirements. You will need to follow the guidance of the grant-making agency regarding application procedures and systems (i.e. NIH ASSIST, NSF FastLane, etc).

You do not need a Grants.gov account to search for funding opportunity. An account is only needed in order to apply for a funding opportunity through Workspace.
BENEFITS OF WORKSPACE

- Helps to streamline the collaboration process on a federal grant by allowing multiple users to concurrently complete the application forms
- Saves time by allowing users/applicants to reuse/copy previously submitted Workspace forms for future opportunities
- Validation is upfront and allows applicants to correct Grants.gov Workspace application errors/warnings prior to submission, which minimizes the rejection rates and virtually eliminating the last-minute errors
- Seamless integration between online webforms and offline PDF forms
- Collaborate with users external to your organization
- Any changes to the Opportunity Package are immediately reflected in Workspace
- Easy to learn thanks to context-sensitive help articles accessible on every page and window
The latest versions of Microsoft Internet Explorer (IE), Mozilla Firefox, Google Chrome, and Apple Safari are supported for use with Grants.gov. However, these web browsers undergo frequent changes and updates, so we recommend that you have the latest version when using Grants.gov.

The Workspace Owner and AOR (OSP) can unlock any locked form. There is a warning message before you unlock the form to contact the person who has the form locked.

https://www.grants.gov/web/grants/applicants/applicant-faqs.html#supportingdetails
GRANTS.GOV WORKSPACE OVERVIEW
OVERVIEW OF PROCESS

- Create a Workspace
- Add Participants to the Workspace
- Edit Forms Online or Download PDFs
- Save Online Forms or Upload Completed PDFs
- Check Application
- Complete Application & Notify AOR
- Submit the Completed Application
- Agency Resolved
- Archived
- Reopen the Workspace

*Picture credited from NCURA 59th Annual Meeting Workspace Overview Session*
How to Create a Grants.gov Account?
What is Workspace?
Why Use Workspace?
The Process
  - Creating a Workspace
  - Managing Participants & Roles
  - Completing Workspace Forms
  - Submitting Via Workspace
Organization Management
Grantor Actions
- Go to Grants.gov website
- Click Login on top right corner
- Click Register as a New User
HOW TO CREATE A GRANTS.GOV ACCOUNT?

REGISTER

Please enter your information below to create an Account.

- Required fields are denoted with an asterisk (*).
- The following special characters are allowed: question marks, periods, dashes, underscores, and @ symbol (Password is not subject to these restrictions).
- Your password must contain at least eight characters including: at least one uppercase letter (A-Z); at least one lowercase letter (a-z); at least one number (0-9); and at least one special character (e.g. ! @ # $ % ^ & *).

Contact Information:

- *First Name: 
  
- Middle Initial: 
  
- *Last Name: 
  
- *Email Address: 
  
- *Phone Number: 

Account Details:

- *Username: 
  
- *Password: 
  (Case Sensitive)

- *Confirm Password: 
  (Case Sensitive)

- *Secret Question: 
  
- *Secret Answer: 

Communications:

- Subscribe: 
  - GRANTS.GOV ALERTS
    Yes, I want to receive email messages containing time-sensitive information about Grants.gov changes that potentially impact users.
  
  - GRANTS.GOV NEWSLETTER
    Yes, I want to receive occasional emails highlighting system enhancements, training resources, and other topics relevant to the federal grant community.

Continue »  Cancel
HOW TO CREATE A GRANTS.GOV ACCOUNT?

- After completing the required fields, you will need to confirm your email by clicking on Send Temporary Code.
- Enter Temporary Code & Click on Continue

REGISTER

Congratulations! Your Grants.gov Account was successfully created.

If needed, you can add Applicant Profile(s) to your Account now. However, if you do not need a Profile or prefer to add your Profile(s) later, you can Continue to your Grants.gov logged in features.

How would you like to proceed?
- Continue - Skip adding a profile at this time
- Add Organization Applicant Profile - Affiliates you with an Organization and with additional access allows you to apply for Opportunities on behalf of the Organization
- Add Individual Applicant Profile - Allows you to apply for Opportunities on your own behalf
Click Add Organization Applicant Profile

Enter Duns number **075050765**

Enter Profile Name: **LSU (No special characters)**

Enter your Job Title **(No special characters)**
HOW TO CREATE A GRANTS.GOV ACCOUNT?

- OSP will need to give you access to Manage the Workspace.
- Once you have the Manage Workspace Role, you can create a Workspace.
- Passwords will need to be changed every 60 days.

Maximum length is 240 characters.
Workspace is a shared online environment where members of a grant team may simultaneously access and fill out forms within an application.
WHAT IS WORKSPACE?

The top section of each Workspace contains key information about the application status.

Each Workspace has 4 tabs: Forms, Participants, Activity and Details

Some have 2 more tabs based on grantor agency services (currently NIH-only): Grantor Image and Preview Grantor Validation
The **Forms** tab contains individual forms that part of the workspace application package.

**Key Actions:**
- Fill out webforms
- Lock/Unlock forms
- Download/Upload PDF forms
- Reuse forms
The **Participants** tab lists the members, or “Participants,” of a Workspace who work as a team to complete the required forms for a federal grant.
The **Activity** tab lists the action that Participants have taken within the Workspace.
The Details tab lists submission history, including links to download every submitted (and re-submitted) application.
The following actions will be covered for applying on Grants.gov using Workspace:

- Creating a Workspace
- Managing Participants & Roles
- Completing Online & Offline Workspace Forms
- Submitting via Workspace
After logging in, create a Workspace by visiting the View Grant Opportunity page and clicking the Package tab.

If the application package is compatible with Workspace, you will be able to create a new Workspace.
Resources:

Video: How to Create a Workspace
https://www.youtube.com/watch?v=oLvzOeILXec&feature=youtu.be

Online User Guide: Create a Workspace
https://www.grants.gov/help/html/help/ManageWorkspaces/Create_a_Workspace.htm
Adding Participants to your proposal:

- Click the **Add from Workspace Organization** button to search for a user within your organization.
- Click the **Add by Username** button to add a user from outside your organization.
- Participants must be registered Grants.gov users.
Removing Participants from your proposal:
 Click the **Remove** link on the Participant record in the Workspace

Reassigning Ownership of your proposal:
 Click the **Make Owner** link in the Actions column
MANAGING PARTICIPANTS & ROLES

Resources:
Video: Understanding User Roles and Access in Workspace
https://www.youtube.com/watch?v=zWSjX__Lfmc

Video: How to Add Participants to a Workspace
https://www.youtube.com/watch?v=FdYRTORps0U

Video: How Do I Add Participants Who Are Outside my Organization?
https://www.youtube.com/watch?v=JfZcLr4Ynj4

Online User Guide: Manage Participants in a Workspace
https://www.grants.gov/help/html/help/ManageWorkspaces/Participants_Tab_Manage_Participants_Applicants.htm
Completing Workspace Forms

Key Actions:

- Fill out webforms (if available)
- Download and Upload PDF forms
- Lock/Unlock forms
Completing Webforms

Webform Basics:
- Complete online forms in web browser
- Navigate by clicking sections
- Tab through form fields
- Required fields have red asterisk
Completing Webforms

Filling Out Fields:

- Open text entry
- Drop-down menu
- Dates/Calendar
Completing Webforms

Filling Out Fields:
- **Radio buttons (multiple choice)**

8. **TYPE OF APPLICATION:**

   - Type of Application:
     - New
     - Resubmission
     - Renewal
     - Continuation
     - Revision

   - Is this application being submitted to other agencies?:
     - Yes
     - No

Attach files within online form

20. **PRE-APPLICATION:**

   - Attachment:
     - ExampleDocument

     [ADD ATTACHMENT] [DELETE ATTACHMENT] [VIEW ATTACHMENT]

21. **COVER LETTER ATTACHMENT:**

   - Attachment

     [ADD ATTACHMENT] [DELETE ATTACHMENT] [VIEW ATTACHMENT]
 COMPLETING WEBFORMS

More Features:

- Hover mouse over form fields for help
- Error Messages explain how to fill out forms fields
Completing WebForms

More Features:

- Autosave occurs every 5 minutes
- Complete SF-424 first to pre-populate form fields and save time
COMPLETING WEBFORMS

- **Save**: Stores your form data & attachments to Workspace
- **Check for Errors**: Form validation & field-level errors
- **Close**: Exits the online form

### 3. DATE RECEIVED BY STATE:

- **Date Received by State**: 
- **State Application Identifier**: 

### SUCCESS

Success: Form successfully saved.

### Errors

Check for Errors revealed the following errors:

1. **DESCRIPTIVE TITLE OF APPLICANT'S PROJECT**: Descriptive Title of Applicant's Project is required. Enter a brief Descriptive Title of the Project.
2. **PROPOSED PROJECT END DATE**: End Date is required. Enter the Proposed End Date of the Project.
3. **CONGRESSIONAL DISTRICT OF APPLICANT**: Congressional District of Applicant is required. Enter the Congressional District in the format: 2 character State abbreviation - 3 character District number. Examples: CA-005 for California's 5th District, CA-012 for California's 12th District. If outside the US, enter 00-000. To locate your Congressional District, visit the Grants.gov website.

### 1. TYPE OF SUBMISSION:

Select Type of Submission:

- Pre-application
- Application
PDF Form Basics:
- Option to download PDF forms to complete in Adobe software
- Upload PDF forms to Workspace
- Upon uploading, data shared between online and PDF versions of forms
PDF Form Basics:

- Tab through form fields
- Required fields have red border and yellow shading
- Hover mouse over form fields for help
- Error messages explain how to fill out form fields
Workspace Features:

- Reuse past forms
- Cross-form validations
- Data retained for three (3) years
**LOCK/UNLOCK TIPS**

- If owner locks/unlocks form, participants & AOR can unlock/lock form, but a message pops up warning to first check with the person who locked it.
- If AOR locks/unlocks form, only owner/AOR can lock/unlock form.
- If participant locks/unlocks form, owner & AOR can unlock/lock form.
Completing Workspace Forms

Resources:

Video: How to Complete Forms in a Workspace
https://www.youtube.com/watch?v=hMKELZQ63Do&feature=youtu.be

Video: Reuse a Saved Workspace Form
https://www.youtube.com/watch?v=BHL8RElRyQc&feature=youtu.be

Online User Guide: Forms Tab-Managing Forms
https://www.grants.gov/help/html/help/ManageWorkspaces/Forms_Tab_Manging_Forms_Applicant.htm
Process:

- Workspace Owner notifies users with AOR role
- User with AOR role submits
- Workspace Owner or user with AOR role may choose to Reopen Workspace

1) Click Check Application
2) Click OK if no errors are found
Submitting Via Workspace

Resources:
Video: How to Submit an Application in Workspace
https://www.youtube.com/watch?v=szSyO5AEQ4c&feature=youtu.be

Video: Reopen a Workspace for Additional Edits
https://www.youtube.com/watch?v=S-iwMfM9igE&feature=youtu.be

Online User Guide: Check Application in Workspace
https://www.grants.gov/help/html/help/ManageWorkspaces/Check_Application_in_Workspace.htm

Online User Guide: Submit a Workspace Package
https://www.grants.gov/help/html/help/ManageWorkspaces/Submit_a_Workspace_Package.htm
Grants.gov
https://apply07.grants.gov/apply/login.faces?cleanSession=1&userType=applicant&loggedout=true

Completing Forms in a Workspace on Grants.gov
https://www.youtube.com/watch?v=hMKELZQ63Do

FAQs by Applications
https://www.grants.gov/web/grants/applicants/applicant-faqs.html#supportingdetails
For more information about Grants.gov Workspace, please visit the links below:

- **Grants.gov Workspace Overview**

- **Grants.gov Workspace Training Video Series**
  https://www.youtube.com/playlist?list=PLNSNGxQE7NWlibdjPYGOsZaG-ol0pBsx3

- **Grants.gov Community Blog articles on Workspace**
  https://blog.grants.gov/tag/grants-gov-workspace/

- **Grants.gov Online User Guide**

Grants.gov Applicant Support
- 1-800-518-4726
- support@grant.gov

Grants.gov Workspace Roles and Access Levels
- **Training video:** https://www.youtube.com/watch?v=zWSjX__Lfmc
- **Blog:** “Defining Grants.gov Workspace Roles and Access Levels”
  https://blog.grants.gov/2017/03/13/defining-grants-gov-workspace-roles-and-access-levels/
QUESTIONS
OSP Contact Information

Location: 202 Himes Hall
Website: www.lsu.edu/osp
Phone: 578-2760
Fax: 578-2751
Email: osp@lsu.edu

Sign up for ASP Listserv: