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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

- Basic Search by keyword, funding opportunity number, or CFDA number
- Browse by Funding Instrument Type
- Browse by Eligibility
- Browse by Category
- Browse by Agency
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 “te?t”, the results would contain links to grant opportunities with phrases that contain “test” or “text” or “tent.”
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 top right of the screen, click apply and then Login to Apply Now (you must have the Manage Workspace Role first)
- 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
HELPFUL TIPS

- 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
The process to reset a forgotten password will change to require you to enter a temporary password that will be sent to the email address associated with your Grants.gov account.

Applicant accounts with a duplicate email address will be required to merge their accounts to login to Grants.gov.
GRANTS.GOV WORKSPACE OVERVIEW
OVERVIEW OF PROCESS

Create a Workspace

Add Participants to the Workspace

Edit Forms Online or Download PDFs

Check Application

Complete Application & Notify AOR

Reopen the Workspace

Created

Forms Passed

Completed and Notified AOR

Submitted

Agency Reopened

Archived

MANAGE WORKSPACE ROLE

WORKSPACE OWNER

ALL PARTICIPANTS

WORKSPACE OWNER

AOR

WORKSPACE OWNER

Save Online Forms or Upload Completed PDFs

Submit the Completed Application

*Picture credited from NCURA 59th Annual Meeting Workspace Overview Session
OVERVIEW

- 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
HOW TO CREATE A GRANTS.GOV ACCOUNT?

- Go to Grants.gov website
- Click Login on top right corner
- Click Register as a New User
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

Continue
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.
WHAT IS WORKSPACE?

The online space where you work on your grant application.

Workspace is a shared online environment where members of a grant team may simultaneously access and fill out forms within an application.
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 clicking the **Apply** button.

If you are not logged in to Grants.gov, the **Apply** button will first direct you to log in to Grants.gov, then you can quickly create a workspace to begin your grant application.
HOW TO CREATE A WORKSPACE

- Complete the Application Filing Name

Apply now using Workspace

If you know the Funding Opportunity Number or the Opportunity Package ID for which you would like to create a Workspace, please enter it below. Otherwise, go to Search Grants to search open Opportunities.

Please enter Opportunity information:

- Funding Opportunity Number: 19-527
- Opportunity Package ID: PKG00246225

Please enter required information for new Workspace:

- Application Filing Name:

Create Workspace  Cancel
Resources:

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

**R16.2 Release**

**Online User Guide: Create a Workspace**
https://www.grants.gov/help/html/help/ManageWorkspaces/Create_a_Workspace.htm
MANAGING PARTICIPANTS & ROLES

- 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.
MANAGING PARTICIPANTS & ROLES

- 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
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
Key Actions:
- Fill out webforms (if available)
- Download and Upload PDF forms
- Lock/Unlock forms
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
Filling Out Fields:
- Radio buttons (multiple choice)
- Attach files within online form
More Features:

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

- Workspace Features:
  - Reuse past forms
  - Cross-form validations
  - Data retained for three (3) years
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=BHL8REIRyQc&feature=youtu.be

**Online User Guide: Forms Tab-Managing Forms**
https://www.grants.gov/help/html/help/ManageWorkspaces/Forms_Tab_Managing_Forms_Applicant.htm
SUBMITTING VIA WORKSPACE

- **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

MANAGE 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=PLNSNGxQE7NWlbdjPYS0sZaG-o10pBsx3

- **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: