GRANTS.GOV℠

FIND. APPLY. SUCCEED.℠

Grantor
User Guide

Version 2.0
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Introduction

Grants.gov has been designed to make it easier for organizations to find and apply for more than $400 billion in federal grants. With electronic access to more than 1,000 grant programs offered by all federal grant-making agencies, Grants.gov leverages the power of the Web to streamline your grant acquisition process.

This user guide has been developed to help you navigate the Grants.gov environment more easily. In it, you'll find an overview of every step of the process.

From getting started and registration to viewing and tracking completed applications, this user guide offers clarification where and when you need it.

Finding Information about Grants.gov

Grants.gov provides information for federal grant-making agencies in the **For Grantors** section of the website. To access specific information about Grants.gov, simply click **For Grantors** in the left side navigation on any Grants.gov page. This will take you to the **For Grantors** page.

Once on the For Grantors page, you may post grant opportunities, publish and retrieve grant applications and access resources specifically for grant-making agencies. Inform co-workers and constituents about Grants.gov, and receive help to make using Grants.gov easier.

Posting Grant Opportunities

To **post grant opportunities**, simply click on **For Grantors** in the left side navigation on any Grants.gov page. For established agency users, click the login link at the top of the page, or in the Quick Links right navigation menu.
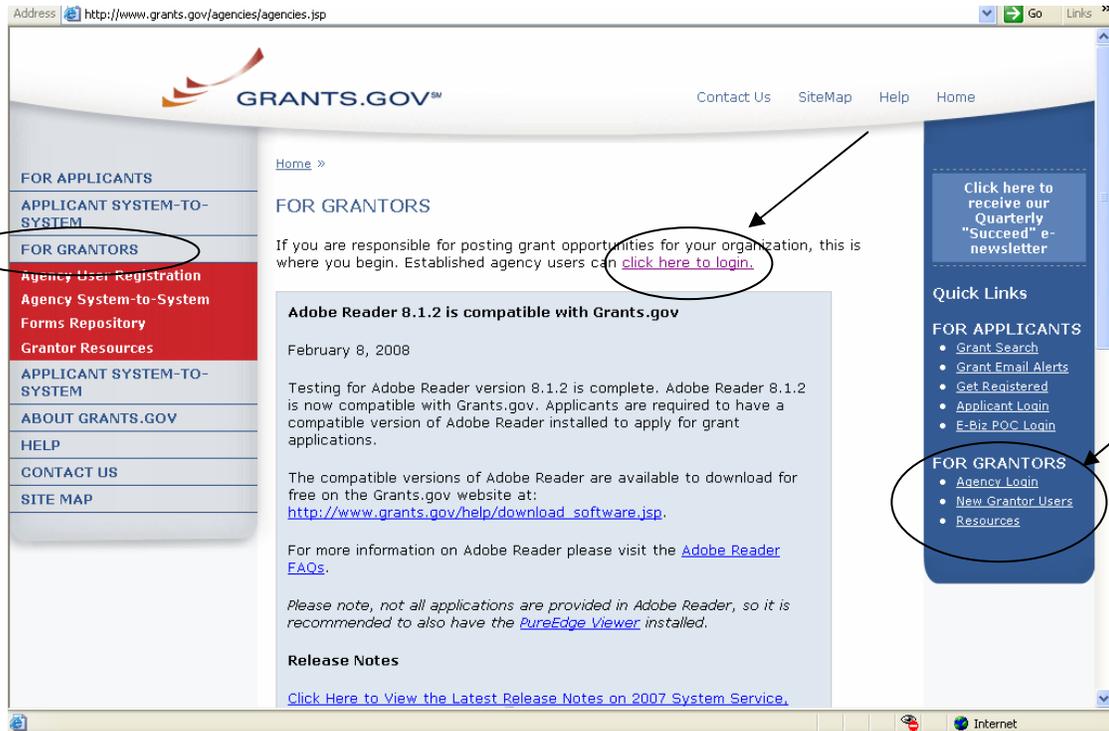
The E-Authentication login page will appear, you will need to login with your username and password to continue.

Grantor Resources

To view resources specifically for grantors, click on For Grantors in the left side navigation on any Grants.gov page. Then, select **Grantor Resources,** the Grantor Resources page will appear. On this page you will have access to FAQs, training material, animated tutorials, key contacts and other important information.
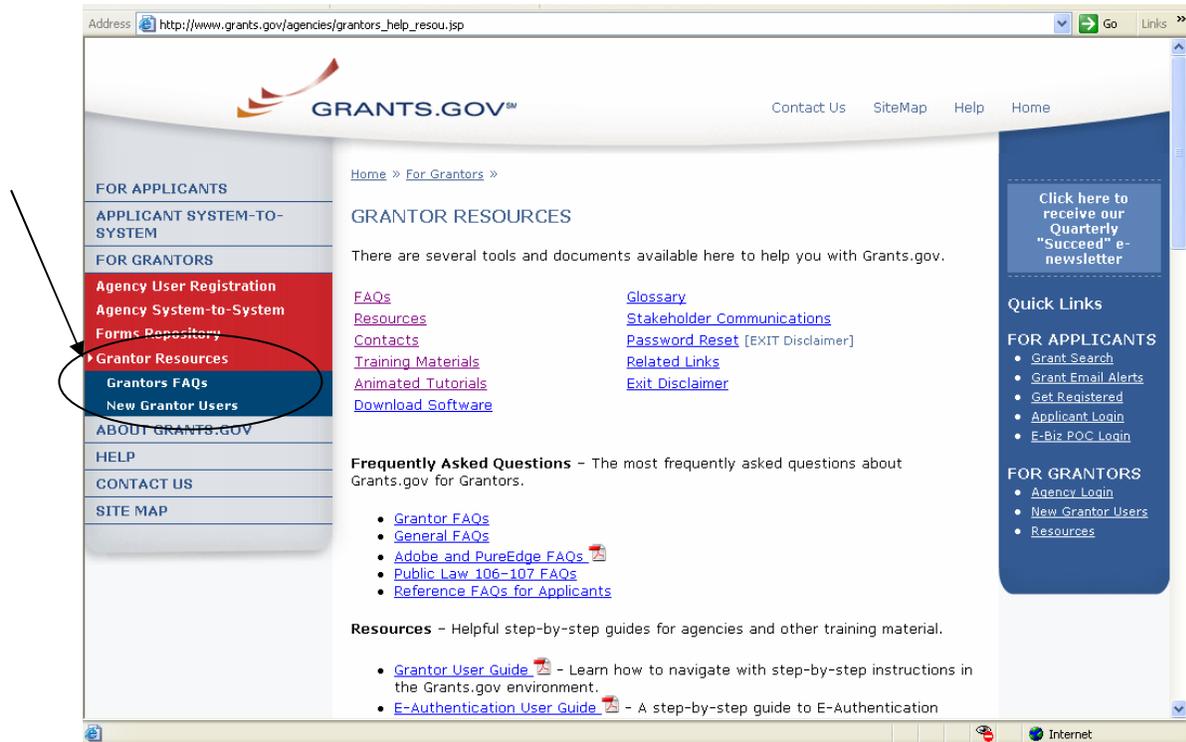
Manage Opportunities

To post a synopsis and/or a grant application, you must first create a grant opportunity.

The first step you must accomplish is logging into the system. On the homepage of Grants.gov click on **Agency Login** on the right side of the screen in the Quick Links menu. You will need to have an agency profile set-up and be authorized by your main agency point of contact in order to be able to create grant opportunities.

After you have logged into Grants.gov, you will see a listing of the different roles that have been authorized to you, including Manage Opportunities.

You will be able to create a new opportunity, modify or delete an existing opportunity within the **Manage Opportunities** section. When creating a new opportunity, you will establish the groundwork information that will be used for the creation of your grant opportunity synopses and grant application packages.

Creating New Grant Opportunities

To post either a synopsis and/or a grant application, you must first create a grant opportunity.

The first step you must accomplish is logging into the system; on the homepage of Grants.gov click on **Agency Login** in the Quick Links menu in the blue box. After you have logged into Grants.gov and selected **Manage Opportunities** from the left-hand side, you will be given a listing of all opportunities currently posted for your agency.

To create a new opportunity, select the **Create Opportunity** button.

The Grant Opportunity Property screen will provide the basic properties that you will need to enter for the new Grant Opportunity. These elements include the following: (* Mandatory fields)

Opportunity Number*: The Opportunity Number is a number that you choose to identify your grant opportunity within the Grants.gov system. You must enter a number into this section – the system will not self-generate a number for you.

Opportunity Title*: This is the title of your grant opportunity. Your Opportunity Title should accurately reflect the nature of your funding opportunity.

Opportunity Category*: You need to select a category for this particular opportunity. The choices are Discretionary, Continuation, Mandatory or Earmark. If the opportunity falls in between one or more of these choices, please select the option that is closest to the description of the opportunity.

CFDA Number: You can enter numerous CFDA Numbers if your opportunity falls under different CFDA programs. This is an optional field. Also, if it is a new program number, you may need to wait for 24 hours after you have entered in this information at the CFDA Catalog before you will be able to post this new CFDA program.

After you have entered this information, you must add either a synopsis or application package in order to have the grant opportunity properties saved.

*For Mandatory Grants do not post a synopsis, instead only post the application package. Then email the applicant the Opportunity Number of the grant so they can apply.

Modifying Grant Opportunities

Manage Opportunities
After creating a grant opportunity, it will be listed as one of the available opportunities that you can modify and delete within your agency's **Manage Opportunities** listing.

Modify Opportunity
To modify a grant opportunity, select the opportunity you wish to modify by clicking on the white circle next to the opportunity and then selecting the **Modify Opportunity** button.

The next screen will allow you to modify the properties of the Grant Opportunity, the Synopsis, the Application Package(s) and Full Announcement Attachments. Just click on the **Modify** button that is under the section you wish to modify.
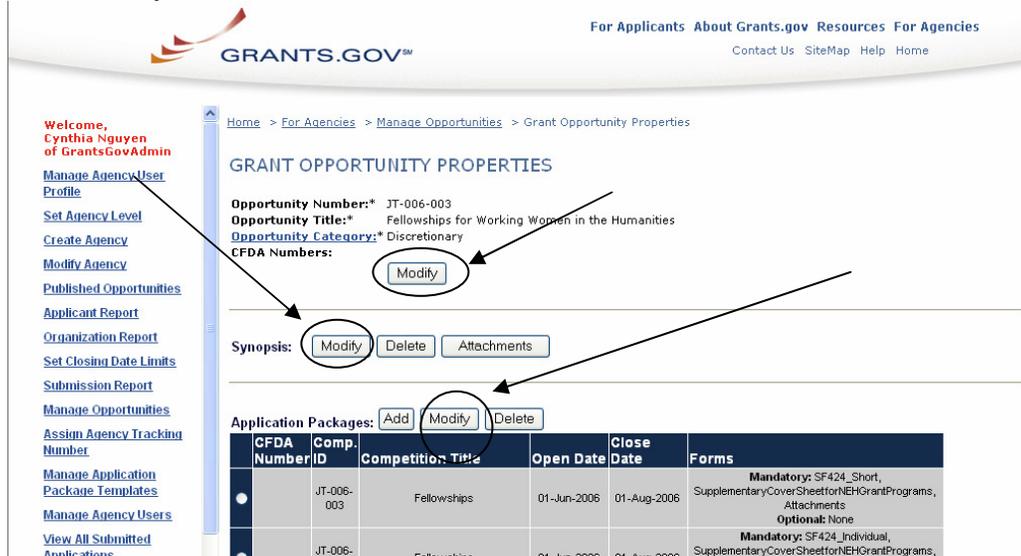
Also, you will be able to add, for the first time, a synopsis, application package(s) and Full Announcement Attachments if you had not added this previously. The screen below shows you an example of a Grant Opportunity without a Synopsis or Application Package. To add a Synopsis or Application Packages simply click the **Add** button next to the section you would like to add to.

You can also delete the synopsis, application package(s) and Full Announcement Attachments. To add or delete attachments for a synopsis click on the Attachments button. You can only add or delete.
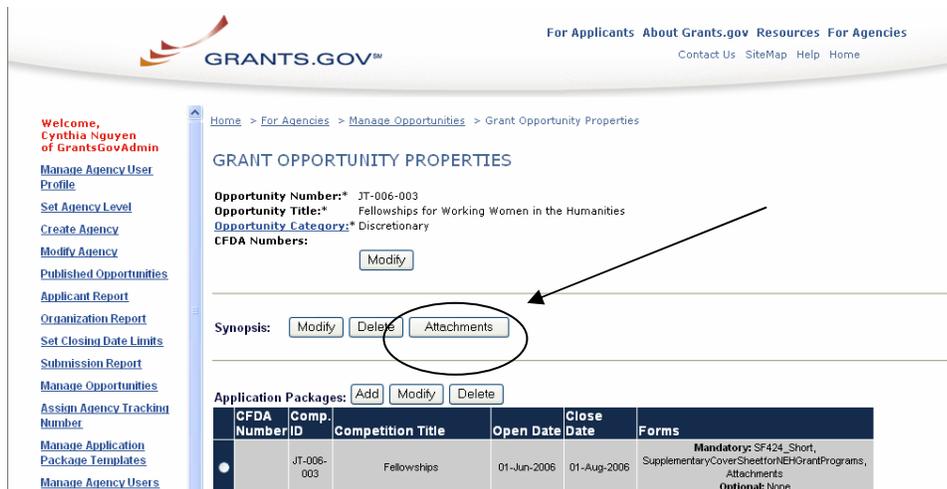
Please note that if you MODIFY or DELETE any of the existing information, it could impact an applicant's ability to submit an application that was previously downloaded before the modification. Also, an email will be sent to those applicants regarding these modifications. If you plan to change any of the following, please contact your Grants.gov Agency Program Advisor before you make the modification:

- Grants.gov Opportunity Number, CFDA Number or Forms within the Application Package

Deleting Grant Opportunities

Manage Opportunities
After creating a grant opportunity, it will be listed as one of the available opportunities that you can modify and delete within your agency's **Manage Opportunities** listing.

Delete Opportunities
To delete a grant opportunity, select the opportunity you wish to delete by clicking on the box next to the opportunity and selecting the **Delete Opportunity** button.

You will receive a confirmation screen when you request to delete an opportunity. This will delete the ENTIRE opportunity and everything that is attached will be deleted. If you just need to delete a portion of an opportunity, refer to the Modifying an Opportunity section.

If you do want to delete the entire opportunity, select **Delete** and the opportunity will be deleted. An applicant will no longer be able to find the opportunity on the website nor will they be able to submit an application for this opportunity.

Publishing New Synopses

In order to post a synopsis, you must first create a new grant opportunity. To create a new opportunity click on the **Manage Opportunities** link. On the Manage Opportunities page, click the **Create Opportunity** button at the top of the page. Once you have entered the required information of a new Grant Opportunity, click on **Add** next to **Synopsis**.

You will be directed to the following page.

When you are on the **Opportunity Synopsis Properties** page you will need to fill out the following forms under **Funding Properties**:

Instrument Type*: Select the particular type of funding that represents the grant opportunity. You can highlight more than one option by using either the SHIFT or CTRL key.

Activity Category*: These are the high-level categories found in the Catalog of federal Domestic Assistance. You can highlight as many categories as you see fit. If you select **Other**, you will need to add additional information within the Category Explanation regarding your opportunity.

Category Explanation: This box becomes mandatory if you have selected **Other** in the **Activity Category** section. If you have not, then this box becomes optional and you may input additional information if needed.

When you continue to scroll down the page you will need to fill out the following:

Posting Date*: This is the date that the opportunity will be posted to the Grants.gov website. If you set the date in the future, the opportunity will not get posted until that date. If you set it for today's date, then the opportunity will be automatically posted today after you publish the opportunity. If you set the post date for the future, any changes and modifications you perform on the synopsis will not be made public. It is only AFTER the synopsis has been posted to the website that all future modifications will be made public.

Close Date: This is an optional field, but if you do not enter in a Close Date, you will need to enter information into the **Close Date Explanation** box.

Close Date Explanation: This is a mandatory field if you do not enter anything into the above **Close Date** box. Also, you can use this as an optional box if you need to include any other information pertaining to the Close Date.

Agency Contact*: This information is prepopulated by the system and is the user information for whoever is currently logged into the system.

Email Address*: This is also prepopulated by the system and can be overwritten.

Email Description*: Enter text which will be presented as a hyperlink to the email address provided. For example, if you entered "Help Desk", then when the synopsis is published and someone clicks on "Help Desk" it will open up an email with the email address already prepopulated in the "To" field.

As you continue to scroll down the page you will need to fill out the following in the **Opportunity Eligibility Information** Section:

Eligible Applicants*: Select the eligible groups for this synopsis. Again, you can select more than one group by using the SHIFT or CTRL option.

Eligibility Explanation: If you select "Other" as your eligible group, you will need to enter text into this field. Also, if you need to include additional information on the eligibility, you can use this text field to provide that further explanation.

As you continue to scroll down the page you will need to fill out the following in the **Award Information** Section:

Cost-Sharing or Matching Requirement*: This defaults to No; please select Yes if the applicant will need to match some of the provided federal funds.

Expected Number of Awards: This is an optional field. If you know this information, please enter a numerical amount into the box. It will only accept numbers.

Estimated Total Program Funding: This is an optional field. If you know this information, please enter the total program funding. It will only accept numbers – do not enter a dollar sign, it will be automatically inserted.

Award Ceiling*: Either enter the dollar amount in numbers or write the word "none" into the field. The dollar amount will be automatically formatted, therefore, you will not need to enter a dollar sign or format the number with commas.

Award Floor*: Either enter the dollar amount in numbers or write the word "none" into the field. The dollar amount will be automatically formatted, therefore, you will not need to enter a dollar sign or format the number with commas.

As you continue to scroll down the page you will need to fill out the following in the **Funding Opportunity Description** Section:

Funding Opportunity Description*: Enter a short description (two to three paragraphs) about the funding opportunity. Do not use any special characters or HTML encoding. If you copy and paste text into this box, please review to ensure that the paragraphs have been formatted correctly and any special characters have been removed.

As you continue to scroll down the page you will need to fill out the following in the **Full Announcement Link** & **Archiving Policy** sections:

Announcement URL: This is an optional field. Enter the full URL where the full announcement for this opportunity is located. If you do not enter the URL, then you will need to upload the Full Announcement. Refer to the **Attaching Full Announcement/Other Documents** section (Pg 36) for more information. You must enter the full URL, including the "http://" (example: http://www.grants.gov)

URL Description: If you enter an Announcement URL, you will need to enter text into this field. The text will appear hyperlinked on Grants.gov and the applicant can click on the text to be linked to wherever you have the Full Announcement hosted.

Archiving Policy: The Archive Policy is defaulted to be archived 30 days after the close date. There are three options to select from:
- Automatic, 30 days after the close date
- Automatic, on the date that you specify
- Manual Archive – you will need to return back to Grants.gov and manually archive by modifying the synopsis and selecting the option to automatically archive on a specified date – you will need to enter in the date for the archive to occur.

Publish: After you have entered in all the information necessary for your synopsis, select **Publish**. You will be given a confirmation screen that will include all of the information you have previously entered. Review this information and select **Publish** again at the bottom of the screen.

If you need to correct any information, select **Edit** to return to the previous screen to allow you to edit. If you select **Cancel**, you will return to the **Manage Grant Properties** screen and none of your work will be saved.

If you select **Publish**, you will receive a confirmation screen regarding the successful publishing of the opportunity.

If the post date you have entered is today's date, then the synopsis will appear on the site within 30 minutes.

If the post date is in the future, then you will also receive a confirmation screen regarding a successful publishing of the opportunity, but it will not be present on the screen until the actual post date you entered. You will be able to edit and modify this synopsis until the post date without any of those edits being visible to the applicant.

Please be aware that Grants.gov will be updating the content on this confirmation screen to more accurately explain that synopsis with a future post date will not automatically appear on the site until that future date.

Modifying Synopses with a Future Post Date

This section is in reference to modifying synopses that have been published, but have a post date that is in the future. These synopses can be modified without the applicants being notified and without the record of these modifications being made public.

In order to modify a synopsis, you must select the grant opportunity from the **Manage Opportunities** section and click on **Modify Opportunity**. Once you enter the **Grant Opportunity Properties** screen, click on **Modify** next to **Synopsis**.

In the next screen, you will be provided the original synopsis. Make the necessary modifications and select **Publish** at the bottom of the screen.

You will be taken to the **Confirm Opportunity Synopsis Properties** screen.

At the bottom of the screen, you will be asked to enter the details pertaining to what you have modified in the **Synopsis Modification Comments** box.

Enter what you have modified. If the post date is in the future, these comments will not be made public, but will serve as a record of what you have previously modified. After this synopsis is posted, any future modification comments will be made public so that the applicant knows what has been modified with the post date that the synopsis was originally posted on the site.

Once you have reviewed the modifications and completed the comments box, select **Publish**. If you need to make additional changes, select **Edit** and perform those revisions. If you select **Cancel** you will be taken back to the **Grant Opportunity Properties** screen.

You will receive a **Synopsis Publish Success** screen. Please be aware that though the text states that the opportunity will be available within 30 minutes, since your post date is not until the future, the synopsis will not be published until that post date. All modifications made before the post date will not be seen by the public.

Click **Continue** and you will be directed to the Grant Opportunity Properties Screen.

Modifying Posted Synopses

This section is in reference to modifying synopses that have been published and posted to the website. These synopses can still be modified, but any modification will require the agency to document what has been modified and this documentation will be made available for the public.

In order to modify a synopsis, you must select the grant opportunity from the **Manage Opportunities** section and click on **Modify Opportunity**. Once you have enter the **Grant Opportunity Properties** screen, click on **Modify** next to **Synopsis**.
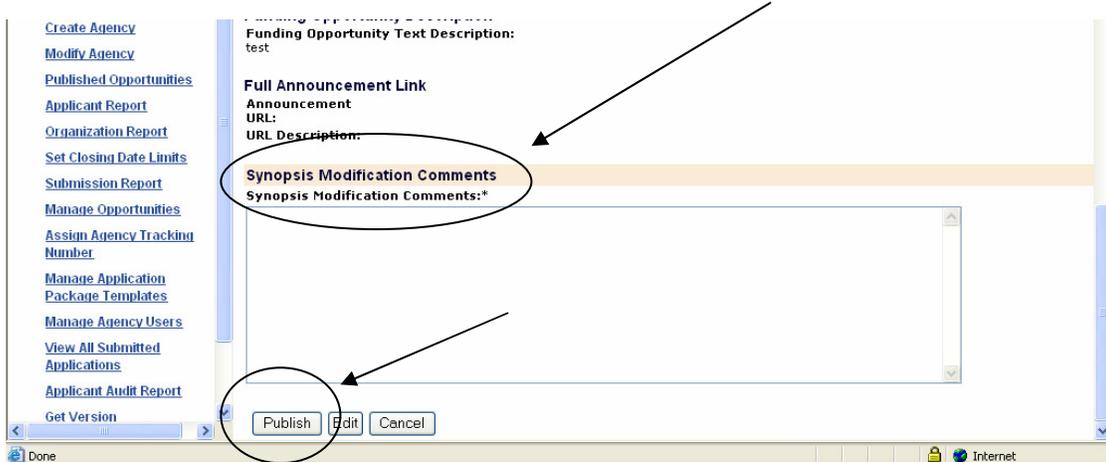

In the next screen, you will be provided the original synopsis. Make the necessary modifications and select **Publish** at the bottom of the screen.

You will be taken to the **Confirm Opportunity Synopsis Properties** screen.

At the bottom of the screen, you will be asked to enter the details pertaining to what you have modified in the **Synopsis Modification Comments** box. Enter what you have modified. This information will be included within the synopsis and will allow the public to know what has been modified.
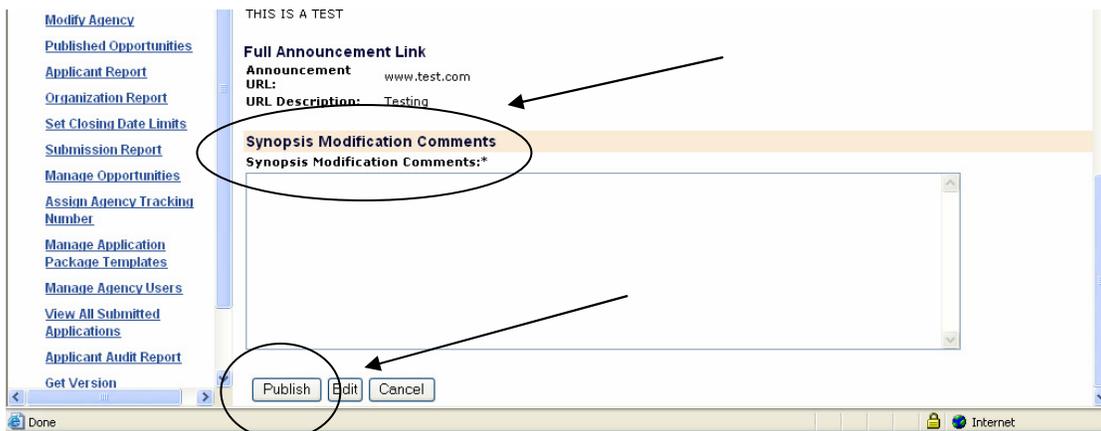
Once you have reviewed the modifications and completed the comments box, select **Publish**. If you need to make additional changes, select **Edit** and perform those revisions. If you select **Cancel** you will be taken back to the **Grant Opportunity Properties** screen.

You will receive a Synopsis Publish Success screen. Please be aware that it could take up to 30 minutes for the modified synopsis to be made public.

Click **Continue** and you will be directed to the Grant Opportunity Properties screen.

Deleting Synopses

You will only be able to delete a synopsis if there is already an application package posted as part of the grant opportunity properties. If there is not, then you will need to refer to the **Delete Grant Opportunity** section in order to discard the synopsis and recreate the opportunity.

If you want to delete a synopsis and the opportunity does have an application package, select the grant opportunity from the Manage Opportunities section and click on **Modify Opportunity** button. Once you enter the Grant Opportunity Properties screen, click on **Delete** next to **Synopsis**.
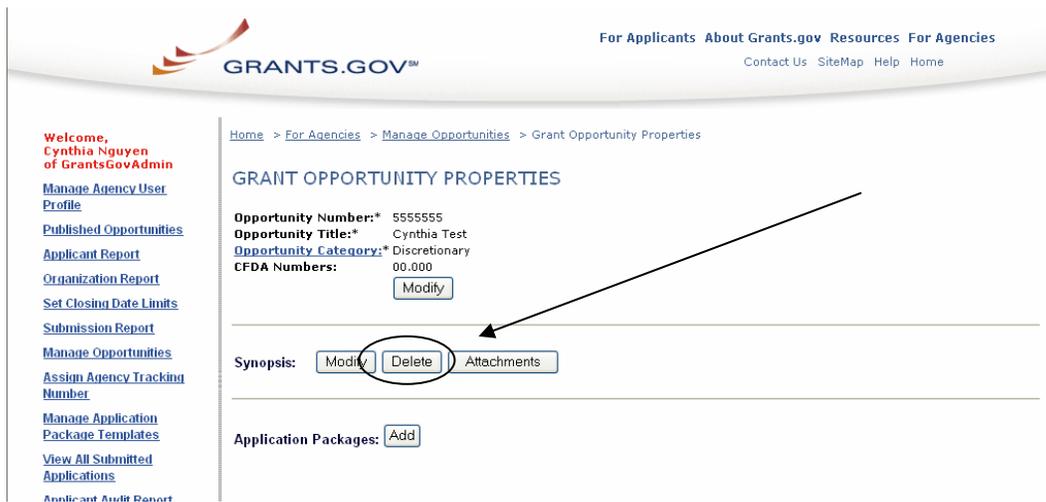

You will be taken to the Confirm Synopsis Deletion screen. Confirm that you want to delete the synopsis for the opportunity by clicking on **Continue** and the grant opportunity synopsis will be deleted. It could take up to 30 minutes for this deletion to occur on the website. If you do not want to delete the synopsis for the opportunity you selected simply click the on the **Cancel** button and you will be returned to the Grant Opportunities Properties screen.

Attaching Full Announcements/Other Documents

This is an optional functionality on Grants.gov. Please be aware that you must either provide a direct Internet link to a discretionary/competitive grant opportunity's Full Announcement or attach the Full Announcement as a document. The following directions provide information on how to attach the Full Announcement as a document.

In order to attach a Full Announcement or other supporting documents, you must have first created a **Grant Opportunity** and a **Synopsis** for that **Grant Opportunity**. Once you have completed those items, then you can select the grant opportunity from the **Manage Opportunities** section and click on **Modify Opportunity**. Once you enter the **Grant Opportunity Properties** screen, click on **Attachments** next to **Synopsis**.

Select the **Add** button on the next screen.

On the next screen, select the number of files you wish to upload and click the **Continue** button.

At the next screen, first select the type of document you wish to attach at **Document Upload Type**. There are three options:

1. Full Announcement
2. Revised Full Announcement
3. Other Supporting Documents

Next, select the **Browse** button; your file directory will open. Find the file you wish to attach and double click on the icon. The name of the file will appear in the **File Name** box. Enter a brief descriptive title for the attachment in the **Brief Description** box. Repeat this process for each file that you are attaching.

Next, select the **Upload Files** button. Or, select **Cancel** to return back to the **Grant Opportunity Properties** screen.

You will receive a confirmation screen. Review the information and if it is correct, select **Upload Files**. If not, select **Cancel**, and this will return you to the **Grant Opportunity Properties** screen.

After confirming the upload, you will get a **Synopsis Attachment Upload Success** screen. Click **Continue** and you will be directed to the Grant Opportunity Properties Screen.

Please be aware that the attachments will be available on the website within 30 minutes of publishing. If you have a post date that is in the future for the synopsis, the attachments will appear at the same time as the future date.

Grants.gov will be updating the content on this confirmation screen to more accurately explain that synopsis attachments with a future post date will not automatically appear on the site until that future date.

Deleting Full Announcements/Other Documents

In order to delete a full announcement or other supporting documents, select the grant opportunity from the **Manage Opportunities** section and click on **Modify Opportunity**. Once you enter the **Grant Opportunity Properties** screen, click on **Attachments** next to **Synopsis**.

At the next screen, the listing of attachments will be provided. Select the attachments you wish to delete and select **Delete**.

You will not be able to modify these attachments. If you have attached the wrong document, you will need to delete the attachment and then add the correct one by following the directions in **Attaching Full Announcements/Other Documents**.

On the next screen, you will receive a confirmation screen. Select either **Continue** or **Cancel**. Selecting **Cancel** will return you to the Grant Opportunity Properties screen. If you select **Continue**, you will get the Delete Synopsis Attachments Success screen.

The attachments will be deleted from the website within 30 minutes of reaching this screen. Click **Continue** and you will be directed to the Grant Opportunity Properties Screen.

Publishing Applications

This section of the site enables you to create, modify and delete application packages published on Grants.gov. In publishing an application package, you will need to already have created a new grant opportunity and then 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.

This screen displays the current grant opportunities for the agency/agencies that you represent. Each opportunity either has a synopsis, a grant application package or both.

To create a new application package for a new opportunity, click the **Create Opportunity** button above the listed opportunities.

To create a new application package for an existing opportunity select the opportunity and click the **Modify Opportunity** button above the listed opportunities. At the next screen you will be able to create a new package.

To modify an existing application package, select the opportunity that you want to modify by clicking in the checkbox in the package's row and then click the **Modify Opportunity** button. At the next screen you will be able to select and modify the application package.

To delete an existing application package, select the opportunity you wish to modify by clicking in the checkbox in the package's row and then click the

Modify Opportunity button. At the next screen, you will be able to delete the application package. **Note:** You will only be able to delete an application package from the Modify screen if–and only if–more than one application package exists. Otherwise, you will need to delete the entire grant opportunity in order to remove the application package from the system.

If there is only one application package that needs to be deleted, then select the grant opportunity that needs to be deleted by clicking in the checkbox in the package's row and then click the **Delete Opportunity** button.

Note: Once an application package is deleted, either through the modification or the deletion, Grants.gov will no longer accept or process any applications which use the deleted package. A notice will be sent to the applicants who registered to receive information pertaining to that opportunity to let them know that the package has been deleted as well.

Creating Applications

Creating a New Application Package to Existing Opportunity:
To create a new package to an existing opportunity, on the Manage Opportunities screen select the opportunity you would like to create a new package for by clicking on the circle next to the opportunity.

Then click the **Modify Opportunity** button above the listed application packages. This will take you to the Grant Opportunity Properties screen.

Click on the Add button next to Application Packages.

Creating a New Application Package:
To create new application packages to be posted at Grants.gov, click the **Manage Opportunities** link on the left of your screen.

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

This screen below displays the current opportunities for the agency/agencies that you represent.

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

This will take you to the **Grant Opportunities Properties** screen where you can begin to enter information about the new opportunity.

After you entered in the initial grant opportunity's properties, you will select **Add** next to Application Packages. From here you will receive the New Package Creation screen. An asterisk marks mandatory fields.

Select your agency's CFDA number in the drop down menu **CFDA Number** field. This must be a valid CFDA number.

Entering a **Competition ID** is necessary if there are multiple packages for an opportunity.

Enter a title for the application package in the **Competition Title** field.

Select **Yes** or **No** for the **Electronic Required*** field. This will notify the applicant whether they will be required to submit electronically or by mail.

Enter the **Expected Number of Applications** field. This is the number of applicants you are expecting to apply.

Enter **Expected Application Size** field. This is the size of the file you expect the grant application to be.

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 will have a **Grace Period** field. This period reflects the number of days after the closing date that Grants.gov will continue to accept applications for a grant opportunity. It also represents the day (Closing Date + Grace Period) that applicants will no longer be able to download the application package. This value is entered by an agency when creating a grant opportunity and is not visible to grant applicants.

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 by attaching a file from your computer by clicking the **Browse** button next to the **Application Instructions*** field. You CANNOT enter a URL to a website in this 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.

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.

Select the Applicant Type by clicking the arrow next to the **Applicant Type** drop down box. This will appear to the applicants who are eligible to apply for the opportunity you are publishing.

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 **Grant Opportunity Properties** 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 **Package 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 **Edit** button to return to the previous screen so that you can make any necessary revisions, or click the

Cancel button to return to the **Grant Opportunity Properties** 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 a **Package Publication Success** screen which will confirm that the new application package is now available for public download.

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

Modifying Application Package

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

This will take you to the **Manage Opportunities** screen. This screen displays the current opportunities for the agency/agencies that you represent.

Select the application package that you want to modify by clicking in the circle 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 **Grant Opportunities Properties** screen.

Select the appropriate application package by checking the box next to the package and click **Modify**.

On the next 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 **Manage Opportunities** 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 **Package 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 **Edit** button to return to the previous screen so that you can make any necessary revisions, or click the **Cancel** button to return to the **Manage Opportunities** 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 a **Package Publication Success** screen which will confirm that the modified application package is now available for the public to download.

Click the **Continue** button to return to the **Manage Opportunities** screen.

Deleting Application Packages

To delete an application package that is published at Grants.gov, click the **Manage Opportunities** link in the **For Grantors** section, on the left of your screen.

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

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

Select the application package that you want to modify by clicking in the circle radio button 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 **Grant Opportunity Properties** screen.

Select the appropriate application package by checking the box next to the package and clicking **Delete**.

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 **Confirm Package Deletion** 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 **Delete Package Success** screen. Click the **Continue** button to return to the **Manage Opportunities** screen.

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

Managing Package Templates

This section of the site 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.

To get to the Manage Application Package Templates page, go to **Agency Login** from Grants.gov. Once you have logged in click on **Manage Application Package Templates** in the left menu.

Creating Application Package Templates

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.

This will take you to the **Manage Application Package Templates** screen. This screen displays the available application package templates.
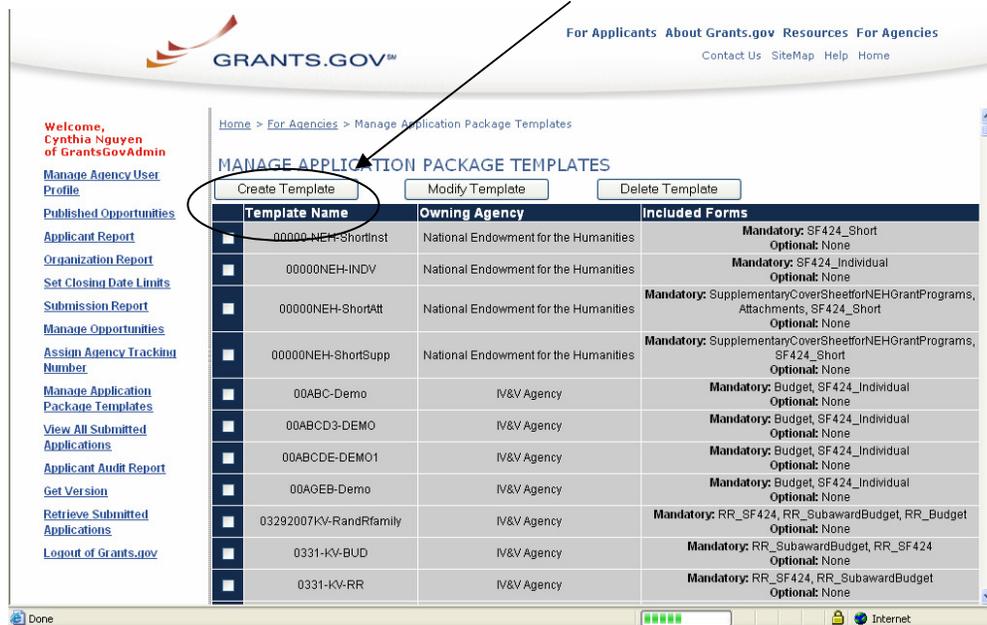
Creating application package templates has no effect on application packages already published on Grants.gov.

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

This will take you to the first step to creating a template. You will need to select which form family you will use. To select a form family click on the drop down menu, choose the form and then hit the **Continue** button.

On the Create New Application Package Template screen, start to enter the information for the template. You will only see the forms that have been developed to be used with your selected forms family.

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. **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 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. 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 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 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.

Modifying Application Package Templates

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

Note: 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. 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 at the top of the page.

This will take you to the **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.

Also, you will only be able to modify templates that belong to your agency. You may give it a different name and save the template to your organization as the screen shot example above displays.

Deleting Application Package Templates

To delete an existing application package template, click the **Manage Application Package Templates** link on the left of your screen. **Note:** 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. 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 at the top of the page. This will take you to the **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.

Retrieving Submitted Applications

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.
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.

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.

Click the **Save** button. This will open the **Save As** window.
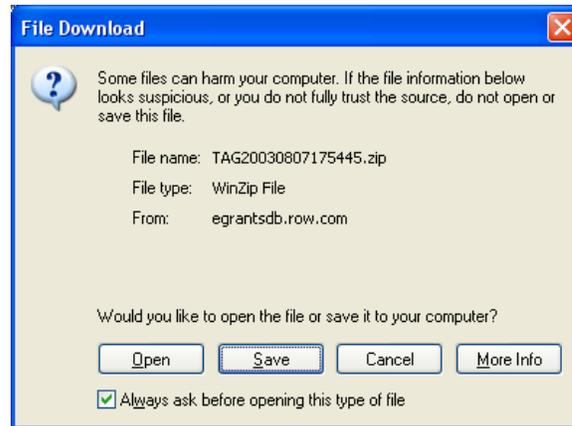
Note: If you click the **Open** button, the zip file will appear empty. You must save the application before opening it.
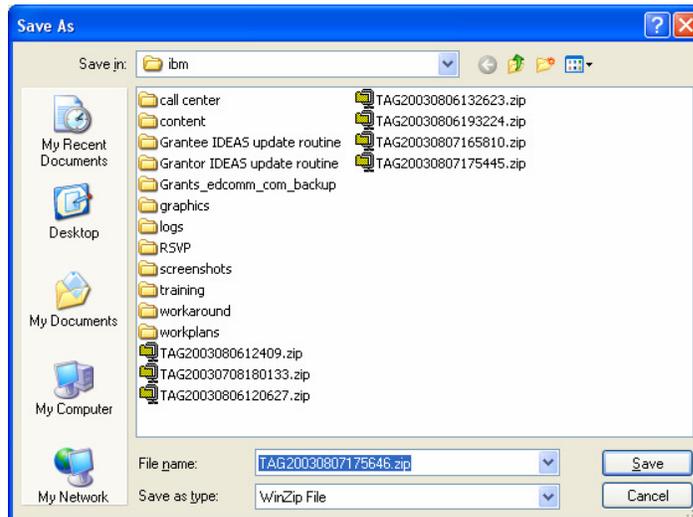
Select the location where you want to save the application and click the **Save** button.

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

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.

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

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

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.

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.
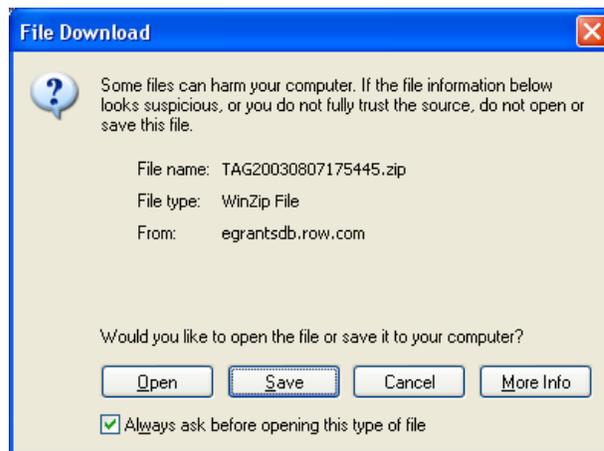
Click the **Save** button. This will open the **Save As** window.
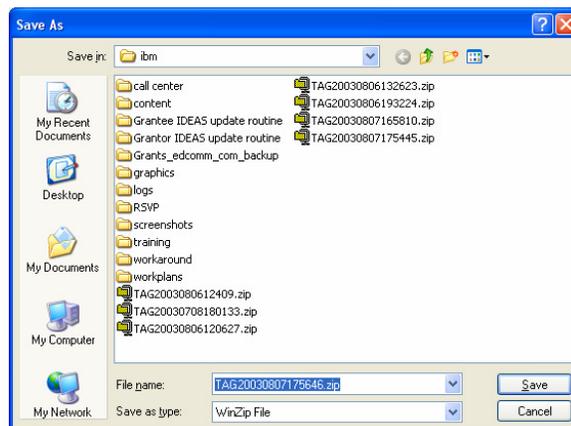
Select the location where you want to save the application and click the **Save** button.

Assigning Agency Tracking Numbers

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. 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 All Submitted Applications** link on the left of the screen.

Managing Agency Users

This section of the site enables you to create, modify and delete agency users as well as reassign agency user roles.

To create a new user click on the **Manage Agency Users** link on the left menu.

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

To reassign user roles, select the user that you want to modify by clicking in the checkbox in the user's row and then click the **Reassign Roles** button.

To modify an existing user's profile, select the user that you want to modify by clicking in the checkbox in the user's row and then click the **Modify User** button.

To delete an existing user, select the user that you want to delete by clicking in the checkbox in the user's row and then click the **Delete User** button.

Reassigning 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.

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.

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 right **>>**. 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 left **<<**. 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, check the box on the screen stating that you have verified the users and their authority to be assigned the roles you have assigned. Then 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 **Manage Packages** role allows a user to publish application packages.

The **Agency Grant Retriever** role allows a user to retrieve applications that are 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.

The **Manage Synopses** role allows a user to set-up grant synopses within your agency's grant opportunities.

The **Agency Report Viewer** allows a user to view applicant and organization reports regarding their registration statuses.

Modifying Agency User Profiles

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.

This screen displays the users currently registered with the agency or agencies that you represent.
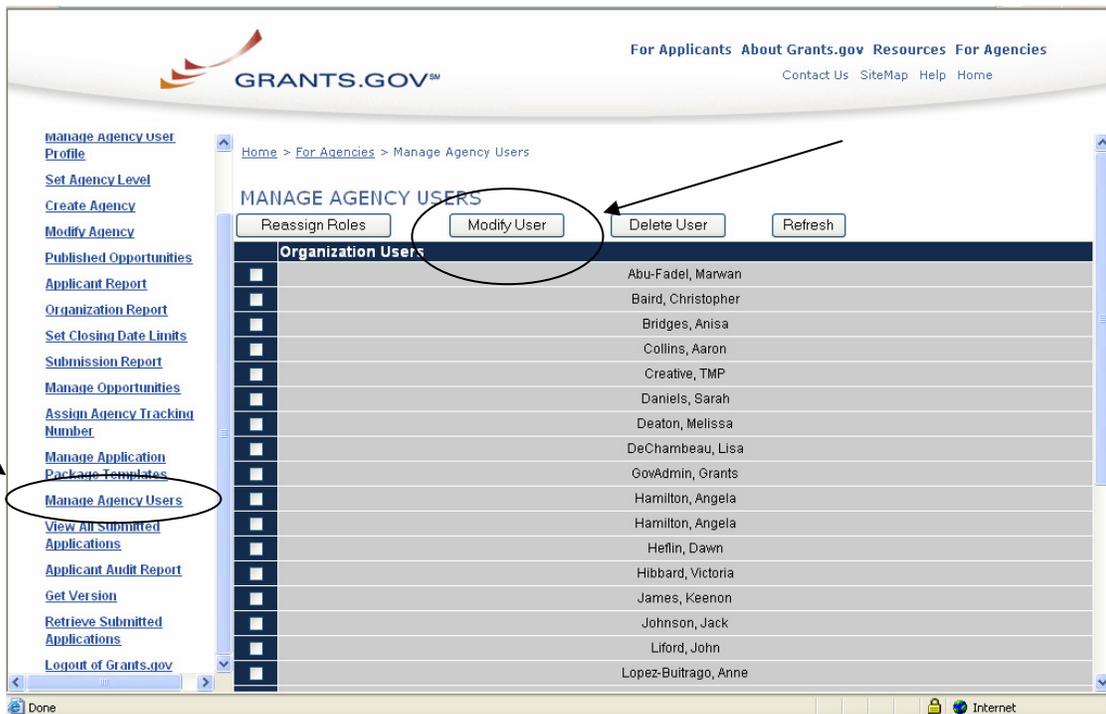
Select the user profile that you want to modify by clicking in the checkbox in the first column of that user's row.

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

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

This will take you to the **Modify 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.

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

Deleting Agency User Profiles

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. This screen lists the users currently registered for your agency.
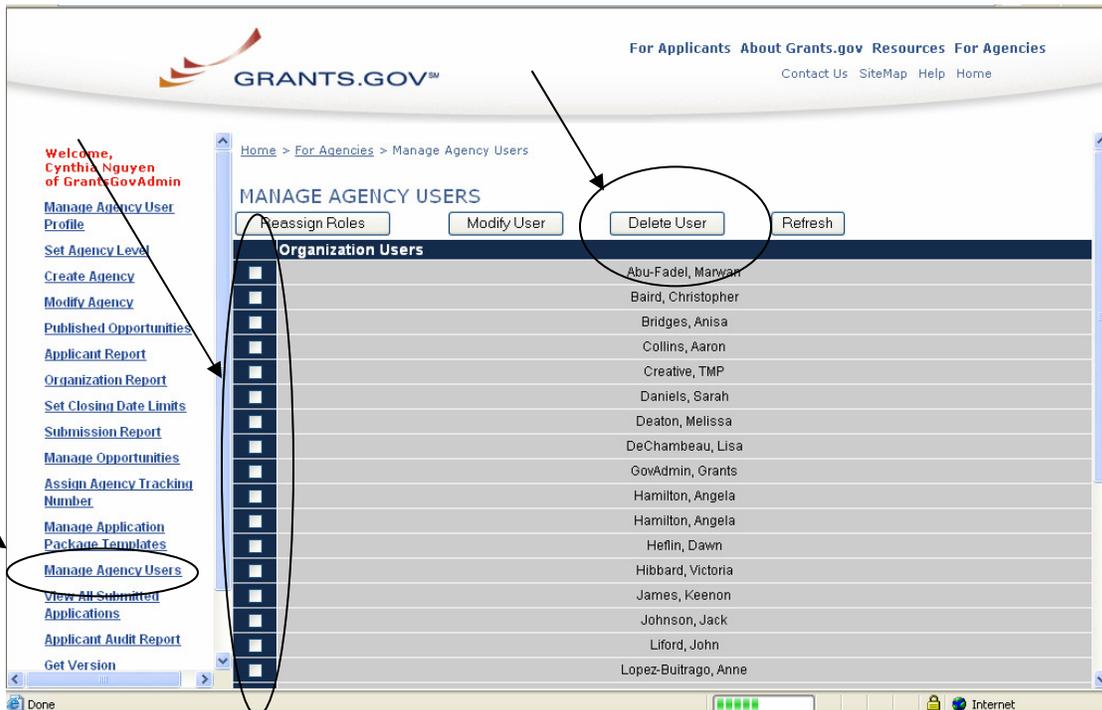
Select the user profile that you want to delete by clicking in the check box in the first column of that user's row. Click the **Delete User** button above the listed users.

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

If a user has the Manage Agencies role, they cannot be deleted until that role is removed. If you try to delete a user with the Manage Agencies role you will get a message that you need to "reassign roles" before deleting the user, and you will get a **Return** button on the Delete User Confirmation screen rather than a Cancel or Delete button.

Managing Agencies

This section shows you how to create and modify agency/sub-agency profiles, and set agency levels.

Note: If an agency or sub-agency needs to delete an agency or sub-agency you will need to contact Grants.gov PMO to do so.

To modify your agency profile, click the **Modify Agency** link in the left menu.

To create an agency, click the **Create Agency** link in the left menu.

To set your agency level, click the **Set Agency Level** link in the left menu.

To modify an existing sub-agency, select the sub-agency that you want to modify by clicking on the sub-agency's name and then click the **Set Agency Level** button above the list. Once you have set the agency level you can modify the agency profile by clicking on the **Modify Agency** link in the left menu.

To modify the users of an existing agency, select the agency for which you want to modify at the **Set Agency Level** screen. Then once you have set the agency level, click on **Manage Agency Users** on the left menu. This will take you to the **Manage Agency Users** screen where you can reassign user roles and modify user profiles as well as delete users. For more detailed information about these procedures, refer to the "Reassigning Roles", "Modifying User Profiles" and "Delete Users Profiles" topics.

AGENCY TIERS

Tier 1
Tier 2
Tier 3
Tier 4
Tier 5
Tier 6
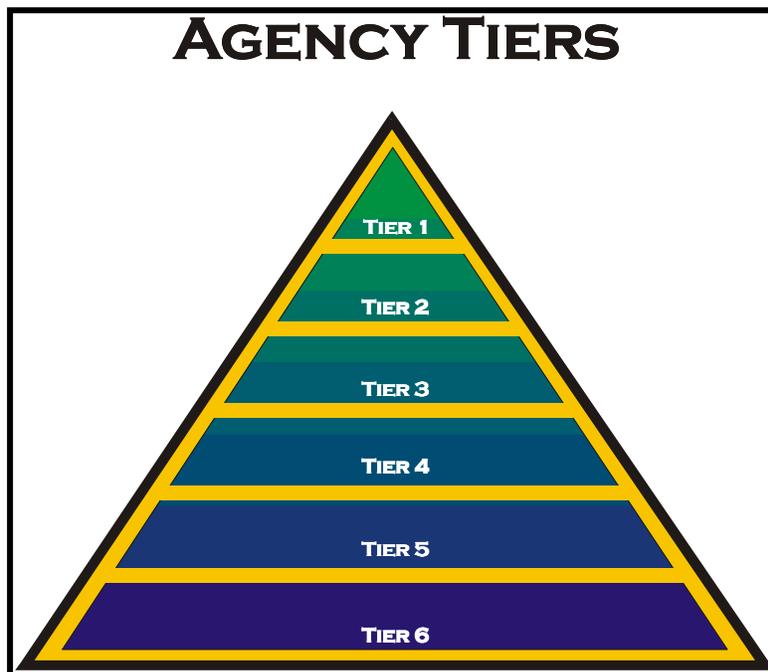
The Grants.gov tiers are linear in that the Tier 1 agency is referred to as the "parent agency". Tiers 2-6 are "sub-agencies" within the "parent agency".

SAMPLE AGENCY STRUCTURE

TIER 1

1

TIER 2

2   **2**   **2**   **2**

TIER 3

3   **3**

TIER 4
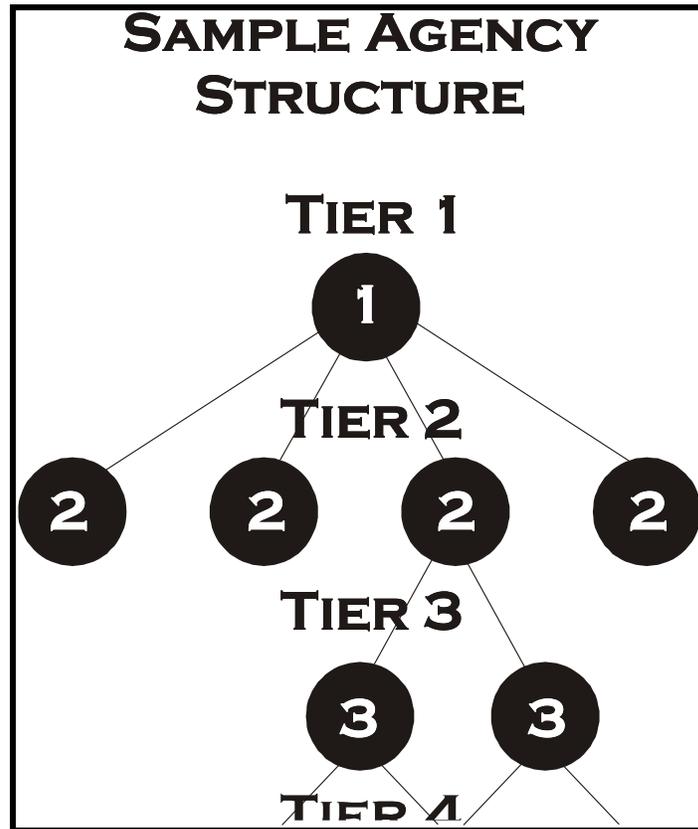
The above graphic is a sample of how the agency and sub-agency structure might look. You may have numerous sub-agencies registered with the parent agency.

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 and so on, 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 (you can copy but you cannot edit the templates from this screen)

- The application 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 change the **Set Agency Level** to the tier below the parent agency. And then to view the users you will need to click on **Manage Agency Users** link in the left menu.

- 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 application 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

Creating Agencies

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

This will take you to the **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 which you are creating in the **Agency Code** field. When the new agency is completed, it will have the prefix of the Parent Agency and the newly created sub-agency. Example: HHS-NIH or DOD-AFOSR-DURIP

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.

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 email notification to the agency's role manager by clicking the arrow next to the **Email Notification to Role Manager** drop down box.

If you do not want to save the new agency, click the **Cancel** button.

OR

If you want to save the new agency, click the **Submit** button.

Modifying Agencies/Sub-Agencies

To modify an agency or sub-agency click the **Set Agency Level** link on the left of your screen.

This will take you to the **Set Agency Level** screen. This screen displays the registered agencies that you represent. Select the agency or sub-agency profile that you want to modify by clicking in the name of the agency or sub-agency in the list.

Once you have selected the agency or sub-agency click **Set Agency Level** button at the top of the screen. Then on the left menu click the **Modify Agency** link. This will take you to the **Agency Profile** screen. Make any necessary revisions.

If you do not want to save the changes you made to the agency or sub-agency profile, click the **Cancel** button at the bottom of the screen.

OR

If you want to save the changes you made to the agency or sub-agency profile, click the **Submit** button at the bottom of the screen to save the changes.

Set Agency Levels

To set a new agency level, click the **Set Agency Level** link on the left of your screen.

This will take you to the **Set Agency Level** screen. This screen displays the registered agencies that you represent.

Select the agency level by clicking on the name of the agency you wish to be set to and then select the **Set Agency Level** button at the top of the list.

You will now be in the level that you selected. Reference your name with the agency you selected in the left-hand top side of the screen. It should now say your name with the level you are currently in underneath your name.

Viewing Applications

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

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

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