Grants.gov Release 15.4
Applicant Release Notes
Version 3

Production Deployment: February 18-21, 2017
Training Deployment: February 21-22, 2017
Summary

• Applicant Enhancements
• User Acceptance Testing (UAT)
• User Impacts
• Learn more about Workspace
APPLICANT ENHANCEMENTS
Grants.gov Home Page Redesign

Apply for a Grant Online Now
Apply for grants by creating a workspace. This feature enables you and your colleagues to work on the grant application online together.

Grants Learning Center
Your community for learning about grants.

Am I Eligible for a Government Grant?

Exploring Eligibility

What Is a Grant?
Community guide to understanding how and why grants are awarded.

What Is...?

How to Edit Online Forms
Online help with editing and completing online forms in Workspace.

7 Tips for Transitioning to Grants.gov Workspace

Summary of Upcoming Changes with User Impacts

Scheduled Maintenance: February 18-21, 2017

15.4 Release Notes for Grants.gov Updates
Online Forms in Production

• 50 Online Forms will be available in Production, selected based on usage

• Incorporate Online Forms UAT feedback:
  – Enhanced “Save & Upload” button and functionality to a single “Save” feature
  – Changed “Cancel” button to “Close” and prompt user to save/discard changes
  – Added Autosave feature
  – Added support for read-only forms; only a “Close” button is available

• Workspace changes:
  – Renamed “Last Uploaded Date/Time” to “Last Updated Date/Time”
  – Removed Upload Count
  – Added support for hybrid approach: Edit and Upload/Download
  – Enhanced Activities tab entries to support online form activities
R15.4 Online Forms

- SF424 (R & R) [V2.0]
- Research & Related Budget [V1.3]
- Research and Related Senior/Key Person Profile (Expanded) [V2.0]
- Project/Performance Site Location(s) [V2.0]
- Research & Related Personal Data [V1.2]
- Application for Federal Assistance (SF-424) [V2.1]
- Application for Federal Domestic Assistance - Individual [V1.1]
- SF424 Mandatory Form [V1.2]
- Application for Federal Domestic Assistance - Short Organizational [V1.1]
- Budget Information for Non-Construction Programs (SF-424A) [V1.0]
- Research and Related Other Project Information [V1.3]
- Key Contacts [V1.0]
- Disclosure of Lobbying Activities (SF-LLL) [V1.1]
- Faith Based EEO Survey [V1.2]
- R & R Subaward Budget Attachment(s) Form 5 YR 30 ATT [V1.3] **
- Planned Enrollment Report [V1.0]
- PHS 398 Cumulative Inclusion Enrollment Report [V1.0]
- PHS 398 Cover Page Supplement [V2.0]
- PHS 398 Research Plan [V2.0]
- PHS 398 Modular Budget [V1.2]
- Project Narrative Attachment Form [V1.1]
- Assurances for Non-Construction Programs (SF-424B) [V1.1]
- Other Attachments Form [V1.1]
- Budget Narrative Attachment Form [V1.1]
- SBIR/STTR_Information [V1.1]
- Grants.gov Lobbying Form [V1.1]
- Attachments [V1.0]
- R & R Subaward Budget Attachment(s) Form [V1.3] **
- HHS Checklist (08-2007) [V2.1]
- ED GEPA427 Form [V1.1]
- ED Abstract Form [V1.1]
- Budget Narrative Attachment Form [V1.0]
- CD511 Form [V1.1]
- Research & Related Senior/Key Person Profile [V1.1]
- HUD Applicant-Recipient Disclosure Report [V1.1]
- NIFA Supplemental Information [V1.2]
- EPA Key Contacts Form [V1.1]
- Other Attachments Form [V1.0]
- Project Abstract Summary [V1.1]
- ED SF424 Supplement [V1.3]
- Disclosure of Lobbying Activities [V1.2]
- NEH Supplemental Information for Individuals [V2.0]
- Protection of Human Subjects [V1.1]
- Project Narrative Attachment Form [V1.0]
- Budget Information for Construction Programs (SF-424C) [V2.0]
- Research & Related Budget 10YR [V1.3]
- Assurances for Construction Programs (SF-424D) [V1.1]
- U.S. DEPARTMENT OF EDUCATION BUDGET INFORMATION NON-CONSTRUCTION PROGRAMS [V1.2]
- Project/Performance Site Location(s) [V1.4]
Hybrid approach: forms can be edited online or downloaded to complete offline.
Sample Online Forms

Left Navigation with sub-items

Error messages link to corresponding fields

Inline Validation Messages
APPLICANT: USER ACCESS MANAGEMENT
UNIQUE USERNAMES AND EMAIL ADDRESSES
User Access Management Objective

• Allow users to consolidate user accounts to move towards one account per Grants.gov Applicant with (1) unique User ID, (2) all required account fields populated, and (3) unique email address

• Each user will have one Grants.gov User ID/Password to:
  • Remember
  • Login
  • Reset Password
  – Lays the foundation for future enhancements

• Users only need to register once with Grants.gov and will be able to maintain one account

• Users may delay the merging of accounts, but Grants.gov highly recommends merging your accounts at your earliest convenience

• Note: EBiz user accounts cannot be merged with other Grants.gov accounts
(1) Login – Duplicate User ID

- Applicants change User ID if duplicate with EBiz POC
Users are prompted to enter missing account information during the login process.
(3) Login – Duplicate Email Address

Applicant merge their multiple accounts to consolidate into a single Grants.gov account (User ID/Password) with a unique email address.
Users confirm their email address prior to merging.
All accounts with duplicate email address are listed. Users select which accounts (only one per DUNS) to keep and merge or to delete.
Once account has unique email address, users can add profiles to their account.

Note: Users will not be able to add a profile to/from an EBiz user account.
Once users have multiple profiles, they can switch between their profiles.
Manage Account – Account Details

Consolidate Manage Account features
Current Profile Name displayed on Applicant Center page
Combine View EBiz POC Profile page with Manage Organization Profile page
## Manage Account

### Provide ability to manage profiles (Add, Edit, Delete, Hide/Unhide)

**MANAGE ACCOUNT**

**Account Details:**
- **Username:** Jane
- **Current Profile:** Maryland

### My Profiles:

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>DUNS</th>
<th>Type</th>
<th>Job Title</th>
<th>My Profile's Visibility Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duke</td>
<td>2947583750000</td>
<td>Organization Applicant</td>
<td>Dean of Science</td>
<td>Visible (Hide)</td>
<td>Edit</td>
</tr>
<tr>
<td>Jane Individual</td>
<td>000000000000INDY</td>
<td>Individual Applicant</td>
<td>Doctoral Candidate</td>
<td>Visible (Hide)</td>
<td>Edit</td>
</tr>
<tr>
<td>Maryland</td>
<td>4586739280000</td>
<td>Organization Applicant</td>
<td>Dean of Science</td>
<td>Current, Default</td>
<td>Edit</td>
</tr>
<tr>
<td>MIT</td>
<td>3869546750000</td>
<td>Organization Applicant</td>
<td>Dean of Science</td>
<td>Visible (Hide)</td>
<td>Edit</td>
</tr>
<tr>
<td>Northwestern</td>
<td>4958674390000</td>
<td>Organization Applicant</td>
<td>Dean of Science</td>
<td>Invisible (Unhide)</td>
<td>Edit</td>
</tr>
</tbody>
</table>
Provide ability to manage profiles (Add, Edit, Delete, Hide/Unhide)

Profile Name defaults to Username. Edit Profile allows users to rename profiles as desired.
EBiz User Management: Manage Applicants for Organization

Manage Applicants for Organizations updated to support user profiles

MANAGE APPLICANTS FOR ORGANIZATION

Please enter criteria and click Search:

Username:  
First Name:  
Last Name:  

Results:

<table>
<thead>
<tr>
<th>Username</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>Email Address</th>
<th>Phone Number</th>
<th>EBiz POC</th>
<th>Has Roles</th>
<th>Account Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joesmith</td>
<td>Joe</td>
<td>A</td>
<td>Smith</td>
<td><a href="mailto:joe.a.smith@organization.org">joe.a.smith@organization.org</a></td>
<td>703-555-1212</td>
<td>Yes</td>
<td>Yes</td>
<td>Active</td>
<td>Manage Roles</td>
</tr>
<tr>
<td>Janeanderson</td>
<td>Jane</td>
<td>B</td>
<td>Anderson</td>
<td><a href="mailto:jane.b.anderson@organization.org">jane.b.anderson@organization.org</a></td>
<td>703-555-1213</td>
<td>No</td>
<td>Yes</td>
<td>Active</td>
<td>Manage Roles</td>
</tr>
<tr>
<td>Alexjohnson</td>
<td>Alex</td>
<td>C</td>
<td>Johnson</td>
<td><a href="mailto:alex.c.johnson@organization.org">alex.c.johnson@organization.org</a></td>
<td>703-555-1214</td>
<td>Yes [Revoke]</td>
<td>Yes</td>
<td>Active</td>
<td>Manage Roles</td>
</tr>
<tr>
<td>Taniajones</td>
<td>Tania</td>
<td>D</td>
<td>Jones</td>
<td><a href="mailto:tania.d.jones@organization.org">tania.d.jones@organization.org</a></td>
<td>703-555-1215</td>
<td>No</td>
<td>No</td>
<td>Inactive</td>
<td>Manage Roles</td>
</tr>
<tr>
<td>Gregdoe</td>
<td>Greg</td>
<td>E</td>
<td>Doe</td>
<td><a href="mailto:greg.e.doe@organization.org">greg.e.doe@organization.org</a></td>
<td>703-555-1216</td>
<td>No</td>
<td>No</td>
<td>Inactive</td>
<td>Manage Roles</td>
</tr>
</tbody>
</table>
EBiz Certificate Management: Manage Certificates for Organization

Separate Certificate and User management. Certificate Management is provided for organizations that use S2S.

<table>
<thead>
<tr>
<th>Certificate ID</th>
<th>Registration Date</th>
<th>Partial Serial Number</th>
<th>Expiration Date</th>
<th>Email Address</th>
<th>Has Roles</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1234567891</td>
<td>06/02/2012</td>
<td>B9A3...5CBD</td>
<td>06/02/2015</td>
<td><a href="mailto:joe.a.smith@organization.org">joe.a.smith@organization.org</a></td>
<td>No</td>
<td>Manage Roles</td>
</tr>
<tr>
<td>1234667890</td>
<td>06/02/2012</td>
<td>B38D...5EAB</td>
<td>06/02/2018</td>
<td><a href="mailto:joe.a.smith@organization.org">joe.a.smith@organization.org</a></td>
<td>Yes</td>
<td>Manage Roles</td>
</tr>
</tbody>
</table>
R15.4 Applicant S2S Impact

• With merged accounts, User ID and DUNS is needed to uniquely identify a Profile so Applicant may need to make the below changes to their S2S interface

• Authenticate AOR web service
  – New optional element added: DUNS
  – DUNS must be specified to uniquely identify Profile and return correct AOR Status for multi-profile accounts
APPLICANT: OPPORTUNITY PACKAGE PREVIEW
View Package Forms

- Enhance View Grant Opportunity – Package Tab
  - Allow users to view Package forms for both Single-Project and Multi-Project Packages without registering/logging in to Grants.gov
  - Clicking on a form displays flat PDF in a new browser tab
Click the Preview link to select the forms within the opportunity package to preview.
View Grant Opportunity – Preview Action

Single-Project view - click on the form to preview the form

Multi-Project view - click on the form to preview the form
APPLICANT: MANAGE WORKSPACES PAGE - REDUCE THE DEFAULT "LAST ACTIVITY DATE" RANGE
Default Activity Ranges

- Reduce default range of “Last Activity Date” on:
  - Manage Workspaces

Last Activity Date range defaults to the last 3 months

Must click the Search button to return results
USER ACCEPTANCE TESTING
User Acceptance Testing (UAT)

- Participate in the Release 15.4 UAT
  - Phase 1 UAT: January 3, 2017 – January 13, 2017
  - Phase 2 UAT: January 30, 2017 – February 7, 2017

- To sign up or if you have any questions, please send an email to:
  - To: GrantsGov.UAT@BPSconsulting.com

- Please provide the following information when you sign up:
  - Participant contact information
  - Type of user (Applicant UI, Applicant S2S, Agency UI, Agency S2S)
  - Participation (confirmed or tentative)

- Guidelines will be provided before the testing begins. Users are encouraged to do ad-hoc testing as well and inform Grants.gov on what was tested.
SUMMARY OF USER IMPACTS
Upcoming Changes with User Impact

• For the latest information on upcoming changes with user impacts, please check out the Grants.gov Notices page.

LEARN MORE ABOUT WORKSPACE
Learn more about Workspace

- For more information about Grants.gov Workspace, please visit our various Workspace resources:
  - Grants.gov Workspace Training Video Series: [https://www.youtube.com/playlist?list=PLNSNGxQE7NWlibdPjPYGOsZaG-ol0pBsx3](https://www.youtube.com/playlist?list=PLNSNGxQE7NWlibdPjPYGOsZaG-ol0pBsx3)