Adding a Grant Note – *GrantSolutions*

Last update: January 12th, 2014

The purpose of this video is to show ACL discretionary grantees how to create and add a Grant Note in GrantSolutions.

Beginning October 1st, 2013, ACL discretionary grantees are required to submit all ACL program performance reports and financial reports in GrantSolutions as Grant Notes.

To add a Grant Note, you will go to www.grantsolutions.gov and click on "Login to GrantSolutions" (0:29 of video)

To log in, you will enter your username and password. If you forget your username and/or password, you can click on "Reset Password/Unlock Account" button under the login fields. If you need further assistance logging in, please contact the GrantSolutions helpdesk at the email or phone number listed (0:30 to 0:54 of video)

Grant Notes are specific to a particular grant. Some grantees may have multiple grants from ACL, possibly for the same program, so – when you are adding a Grant Note – please ensure that you are selecting the appropriate grant.

To add a Grant Note, you will find the grant that you would like to add a note to, and then click the "Grant Note" link.

If you do not see the grant you are trying to add a Grant Note to in your list of grants, please contact your ACL grants management specialist for that grant. You may not be assigned the appropriate role for the grant and, therefore, may be unable to see it in your list.

Once you select "Grant Notes", a new page will open. At the top, you will see some fields that will allow you to search within existing notes for the grant – using date, note category, subject, etc. Any existing Grant Notes for this grant will be listed (1:25 to 1:40 of video).

To add a new Grant Note, you will click "Add". Once you select "Add", you should see your name at the top as the author. You will then put a subject that describes what you are submitting. For this example, we will show how to submit a program performance report (PPR for short). For the subject field, for example, we will type "PPR 9-30-12 to 3-31-13", which is the date range the report covers (1:43 to 2:15 of video).

For note type, you would select "Correspondence". This means that the AOR, project director/principle investigator, and program and fiscal support staff at your organization, along with anyone at ACL, will be able to view this Grant Note (2:16 to 2:24 of video).

Next, you will pick a "Note Category". From the drop down menu you will select "Programmatic Report" as the category (or selecting "Progress Report" would also be acceptable for a PPR) (2:25 to 2:33 of video).

In the text box, you will provide a brief description of what you are submitting. For this example, we will type "Programmatic report for period of 9-30-12 to 3-31-13" as the description (2:26 to 2:55 of video).

Next, you will upload your report. Multiple files, of different file types (ex: PDF, Word Document, Excel Spreadsheet, .msg, jpg, etc.), can be attached to a single Grant Note. For this example, our report is one document, a PDF, which we will be uploading (2:56 to 3:07 of video).

For each file you want to upload, you will first type in a name for the file and select "Browse". You will then select the file you would like to attach from your computer, click "Open", and then click "Upload". You will want to pay attention to the status of the upload. You will want to wait until it says "Successful" prior to clicking "Submit". If you do not click "Submit", the Grant Note **will not be saved** (2:57 to 3:57 of video).

Once you have submitted the Grant Note, you should see it in the list of notes. On the right hand side of the screen, under "Actions", you will see three icons. The first allows you to edit the Grant Note; the second to delete the Grant Note; and the third to view the Grant Note. You should always view a Grant Note after submission to ensure that the file(s) you uploaded are there and you are able to open them (3:58 to 4:21 of video).