Grants.gov Workspace: What You Need to Know

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For years, the process for applying for a federal award at Grants.gov has been the same. An organization goes to the Grants.gov website, identifies an award opportunity that could offer needed federal funding, then downloads the application package and begins the application submission process. If this sounds like the normal routine at your organization, be prepared to make some changes!

> **WARNING!** As of December 31, 2017, Grants.gov will do away with the traditional application package download process and require all users to apply via Grants.gov Workspace.

Grants.gov anticipates that the changeover will bring a range of benefits to organizations applying for grants by:

- Streamlining collaboration on grant proposals;
- Saving time by reusing pre-filled-in forms for new applications;
- Allowing applicants to detect and correct errors earlier, resulting in fewer rejected submissions; and
- Simplifying the application process.

Currently, Grants.gov is allowing organizations to either download the traditional application package or use Workspace, but the former option will no longer be available as of January 1, 2018. Therefore, applicants should now familiarize themselves with how Grants.gov Workspace operates and ensure that team roles are clearly delegated and understood well in advance of deadlines to avoid any problems or confusion about how to submit a complete application. This whitepaper will give you a basic understanding of what Workspace is and how to get started using it.

So, what is Grants.gov Workspace?

Launched in October 2015, Workspace is a shared, online environment that allows multiple individuals from the same applicant organization to work on one single application. Applicant organizations that use Workspace are able to divide an application package into separate PDFs, allowing more than one user to access and update the forms at the same time.

> **Tip** Applicants have the option of reusing saved Workspace forms to submit with future applications.

When applicant organizations are ready to submit the proposal, the completed forms in Workspace are automatically "stitched together" into a final application package. This helps to address difficulties experienced when working as a team using the traditional application package, where individuals previously had to email the most up-to-date versions of files and forms back and forth while making sure they were using the same exact version of Adobe software.

Workspace's functionality is designed to assist applicant organizations that typically have more than one individual working on a single federal grant application. Not only does it make the application process easier, it is also critical for ensuring compliance with the Office of Management and Budget's (OMB's) uniform guidance. With the uniform guidance's increased emphasis on performance over compliance, applicant organizations must ensure that their financial and program staff communicate effectively in order to submit a proposal that is complete, accurate and responsive to the awarding agency's requirements to perform pre-award risk and integrity reviews (§200.205). Applicants must involve all staff to help assemble the required details in proposals, where pertinent, about their business and financial practices and any potential issues related to prior performance, risk and integrity – making the effective use of Workspace paramount to your organization's success.

Workspace Set-up and Roles

In order to use Workspace, applicant organizations must first have a user account registered with Grants.gov, which requires two administrative steps:

1. Register on the System for Award Management (SAM.gov)
2. Acquire a unique entity identifier (currently the DUNS number provided by Dun & Bradstreet)

Details on Grants.gov registration for organizations are available at http://www.grants.gov/web/grants/applicants/organization-registration.html.

E-Business Point of Contact (E-Biz POC)

Individuals working on the grant application will need to be assigned Workspace roles by the applicant organization's **E-Business Point of Contact** (E-Biz POC). This person is an administrative user with access to SAM, who will assign other users roles, each with a different levels of access in the Workspace system. It is important for applicants to understand these roles, which may overlap, and to designate them in advance to avoid confusion among staff about who is responsible for each of the steps required to submit a complete application.

Authorized Organization Representative

The applicant organization's E-Biz POC must designate an **Authorized Organization Representative** (AOR) and determine which users have the "Manage Workspace" role on the account page. The AOR is permitted to submit applications on behalf of the organization. Users assigned the "Manage Workspace" role will be able to initiate the application process by selecting a funding opportunity from the Grants.gov database and create a shared workspace to complete the application. After creating a workspace, the user with the "Manage Workspace" role is automatically assigned the "Workspace Owner" role, or may assign this role to another individual with a "Manage Workspace" access level.

> A single applicant may have multiple workspaces and a single user can manage more than one workspace.

Workspace Participants

Users with the "Workspace Owner" role can give individuals access to the application forms in the workspace by adding them as **Workspace Participants**. After these participants have downloaded and completed application forms, they can upload the filled-in forms back to the workspace.

When all application forms have been uploaded back to the workspace, the "Workspace Owner" must verify that the application is complete and notify the AOR (if different from the Workspace Owner), who then may submit the application to Grants.gov.

Workspace 101: Ten Steps to Submitting an Application

1. Create a "workspace" for each funding opportunity you want to submit an application for.

2. Add participants and determine their level of access to information within a workspace.

3. Assign a "Workspace Owner" who will manage the application and add "Workspace Participants."

4. Fill out, edit and complete grant application forms online or download and print individual PDFs.

5. Upload the completed PDF forms to Workspace via the "Upload" link on the "Manage My Workspace" page.

6. Check the application for errors – then check again.

7. Complete the application and notify the "Authorized Organizational Representative" that it is ready for submission.

8. Reopen the workspace if any final edits are necessary – even if it is in the "Ready for Submission" or "Submitted" status.

9. Submit the completed application through Workspace by clicking the "Sign and Submit" button on the "Manage My Workspace" page.

10. Use the Grants.gov tracking number to track the status of the application.

Workspace Compatibility and Other Technical Issues

Most application pages posted by awarding agencies to Grants.gov are now compatible with Workspace functionality.

In order to determine whether a package is compatible, applicants can click on the "Package" tab on the Grant Opportunity page and look for the "Workspace Compatible" column. If the column is marked "Yes," the corresponding application package is compatible with Workspace. If the column is marked "No," one or more of the forms included in the package are not compatible with Workspace and applicants must fill out and submit the application using traditional, single-user procedures.

All application packages must be compatible with Workspace by the end of the year.

Tech Tip

Grants.gov cautions applicants about computer viruses that may be present in files applicants must download from the Workspace system to complete their applications.

Grants.gov, like other online systems, is vulnerable to "zero-day attacks," in which an attack on a computer system exploits a previously unknown vulnerability that the system administrator has not had time to address and fix. Grants.gov encourages applicants to take the following preventative measures when downloading and uploading files with Grants.gov Workspace:

WARNING!

- Ensure up-to-date virus protection software is installed and running on the system or network they use to perform actions within Workspace

- Perform a scan for viruses locally before uploading files or submission packages to Workspace

- Report any suspicious files or activity immediately to the Grants.gov Support Center at 1-800-518-4726 or support@grants.gov

Applicants also should ensure that their own software is compatible with the version of Adobe used by Grants.gov Workspace before attempting to download forms for an application.

Information about the correct version of the software required by Grants.gov is available at https://www.grants.gov/web/grants/applicants/adobe-software-compatibility.html.

For More Information

Applicants are encouraged to prepare for the changeover by educating themselves on the Grants.gov Workspace submission process and checking the Grants.gov notices page at http://www.grants.gov/web/grants/outreach/grants-gov-notices.html for more updates.

For an overview of Workspace, visit http://www.grants.gov/web/grants/applicants/workspace-overview.html.

For an introductory video on Workspace functionality, visit https://www.youtube.com/watch?annotation_id=annotation_1907966863&feature=iv&src_vid=ARTg88po6Lw&v=GK5tJiKGOjE.

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