**Grants.Gov Workspace (SPA talking points)**

* **User Roles:**
  + MW – Manage Workspace role
    - Create new workspace and operates as workspace owner
  + AOR – Authorized Representative (AOR) role
    - Able to submit applications
  + No Role – Grants.Gov user with no role
    - Can only complete and edit individual forms.
* **Workflow:**
  + User registers with grants.gov and AOR grants role
  + User with “Workspace Role” creates a workspace by downloading funding opportunity notice
  + Workspace owner adds “participants” as needed to assist with form completion
    - Forms can be locked
  + Forms are completed by either downloading one by one or by online completion.
    - Complete all forms and correct any errors.
    - Once all forms are completed and application is error free, a “Complete and Notify AOR” button appears. User clicks on this button and application and AOR is notified.
  + AOR either re-opens application for further editing or can sign and submit.
    - “Re-Open” button is activated.
    - “Sign and Submit” button is activated.
* **Reuse Forms:**
  + Completed forms can be uploaded into a new workspace in order to be used in a new application.
* **Resources:**
  + Grants.Gov Training Videos:

[**https://www.grants.gov/web/grants/applicants/applicant-training.html**](https://www.grants.gov/web/grants/applicants/applicant-training.html)

# Grants.Gov Workspace - Step-by-Step Approach:

### 1. Make sure all team members and external contributors have registered with Grants.gov

Without a Grants.gov account, team members or external contributors will not be able to access the workspace and fill out application webforms. For example, if you want seven different individuals to help complete webforms, then all seven should [register a Grants.gov account.](https://www.grants.gov/web/grants/register.html)

### 2. Design an internal application workflow and assign responsibilities to your team members and external contributors

Use our [interactive workflow](https://www.grants.gov/web/grants/applicants/workspace-overview/workspace-process.html) graphic and  [Workspace roles and access](https://www.grants.gov/web/grants/applicants/workspace-overview/workspace-roles.html)chart to help you design your application plan. For example, you will want at least one "participant" to have the Manage Workspace role, so that he or she can create the workspace. You will also want a participant who has the AOR role, so that the application can be submitted when it has been completed.

### 3. Log in and create your workspace from the Package tab on the View Grant Opportunity page

Any user with the Manage Workspace role may create the workspace. The user who creates the workspace will automatically become the Workspace Owner.

### 4. Add team members from your organization as "Participants" so they can access the application forms

The Workspace Owner (an access level automatically assigned to the user who creates the workspace) should add Participants to the worksapce. At least one Participant should have the AOR role so that the workspace can be submitted.

### 5. Add any additional Participants who are registered with Grants.gov, though not part of your organization

The Workspace Owner can add any external contributors to the workspace as long as they have registered with Grants.gov.

### 6. Limit budget form access to only the Participants who need it

The Workspace Owner may want to control access to sensitive budget forms. This is most conveniently done when adding individual participants to the workspace.

### 7. Add subforms to your workspace so that sub-applicants can easily find and complete them

Some workspace forms contain subforms that must be filled out separately from the "parent" form. Participants can access and enable a package's subforms by clicking the Manage Subforms link in the Form Name column on the Forms tab of the Manage Workspace page.

### 8. Reuse forms from previous workspaces

Applicants may choose to reuse forms (or even an entire workspace). When a form is reused, the information on the form's cover sheet will be updated to match the current workspace. Other form data will not be changed. Also note, after a form is reused, any data in the new workspace form will be overwritten.

### 9. Complete all required forms that remain

Applicants may choose to complete either the PDF version [or the webform version](https://www.grants.gov/help/html/help/ManageWorkspaces/FillOutWebform.htm) of each form. They may also switch between form types. Data is synced to the workspace upon uploading the PDF forms and upon saving the webforms. Grants.gov recommends that the person completing each form locks access to it, so that others cannot overwrite the work.

### 10. When all forms have been completed, the AOR can be notified and the application submitted

Workspace performs some error checks on form fields automatically. Other checks are run by clicking the Check For Errors button within the workspace. When the application is ready, the Workspace Owner has the option of clicking the [Complete and Notify AOR button](https://www.grants.gov/help/html/help/ManageWorkspaces/Complete_and_Notify_AOR.htm?rhsearch=check%20for%20errors%20button&rhsyns=%20). However, at any point after all forms are in the "Passed" status, the AOR may log in and click the Submit button.

### 11. Track your application and download the entire package for your offline record-keeping

After submitting, you can [track your application](https://www.grants.gov/help/html/help/ManageWorkspaces/Track_a_Workspace_Package.htm?rhsearch=track%20application&rhsyns=%20) using the tracking number you receive from Grants.gov. You may also want to download a copy of your completed application for your offline recordkeeping. We recommend tracking and downloading your application [via the Details tab of your workspace](https://www.test.grants.gov/help/html/help/ManageWorkspaces/Details_Tab_View_Details_Applicant.htm).

**Resources:**

<https://www.grants.gov/web/grants/applicants/workspace-overview/workspace-advanced.html>

[**https://www.grants.gov/web/grants/applicants/applicant-training.html**](https://www.grants.gov/web/grants/applicants/applicant-training.html)