

Share a Workspace Proposal with Others and ORA

Add Participants and Authorized Organization Representative

1. Adding the Authorized Organization Representative (AOR)

- Click on the **[Participants]** tab.
- Click on the **[Add from Workspace Organization]** button.

The screenshot shows the 'MANAGE WORKSPACE' interface. At the top, there are progress indicators: 'Created' (checked), 'Forms Passed' (checked), 'Complete and Notify AOR' (unchecked), 'Submit' (unchecked), and 'Agency Received' (unchecked). A yellow notification box says 'Participant successfully removed'. Below this, application details are shown: 'PA-EN-000 - PKG00039268 NIH FORMS-E UBER test FOA National Institutes of Health'. Application Filing Name: CMK-test [Edit Name]. Workspace ID: WS00003719. Workspace Status: In Progress. Opening Date: Nov 01, 2017. AOR Status: Workspace needs AOR. Last Submitted Date: ---. Closing Date: Nov 01, 2020. Workspace Owner: Christine Kang. SAM Expiration Date: Jan 01, 2020. DUNS: 7909342850000. The 'PARTICIPANTS' tab is selected. Below the tabs, there are buttons for 'Export Detailed Data', 'Add from Workspace Organization', and 'Add by Username'. A table below shows '1-1 of 1 Records' with columns: Username, Participant Name, Phone Number, Email, Form Access, Authorized to Submit, and Actions. The table contains one row for Christine Kang.

- Click on the dropdown for Role and select the Expanded AOR role. Please select your CA's team Authorized Official, which would be one of these three: Takeia Bradley, Evan Crierie or Katie McKeon. Then click **[Save]**.

The screenshot shows a search interface. At the top, it says 'Please enter criteria and click Search:'. There are input fields for 'First Name' and 'Last Name', a 'Role' dropdown menu set to 'Expanded AOR', and a 'Search' button. Below this, there is a section 'Select Applicants and Click Save (0 selected applicants):'. It shows '1-5 of 5 Records' in a table with columns: Username, First Name, Last Name, Phone Number, Email Address, and Actions. The table lists five applicants: ECRIERIE0001 (Evan Crierie), WMONT0001 (Katie McKeon), MANDERS0001 (Monique Anderson), SEGLOFF0001 (Sally Egloff), and TBRADLEY0001 (Takeia Bradley).

2. Adding UMD Participants

NOTE: All participants you wish to add must first have a Grants.gov account.

- Click on the **[Participants]** tab.
- Click on the **[Add from Workspace Organization]** button.

This screenshot is identical to the one above, showing the 'MANAGE WORKSPACE' interface with the 'PARTICIPANTS' tab selected and the 'Add from Workspace Organization' button highlighted.

- c. Search for the participant's name. Add the person by clicking the **Add** checkbox next to his/her name under the Actions column then click the **[Save]** button.

MANAGE WORKSPACE Created Fill Out Forms Complete and Notify AOR Submit Agency Received

Add Participants from Workspace Organization

Please enter criteria and click Search:

First Name: Last Name: Role:

Select Applicants and Click Save (1 selected applicants):

1-1 of 1 Records

Username	First Name	Last Name	Phone Number	Email	AOR Role	Manage Workspace Role	Actions
SEGLOFF0001	Sally	Egloff	301-405-8060	segloff@umd.edu	No	No	<input checked="" type="checkbox"/> Add

1-1 of 1 Records

- Participants will have the “All Forms including budget” access selected by default. Later, if you find the participant should have more limited access, please change the access by clicking on the **[Manage Access]** link under Actions and adjust the access accordingly. Once done click the **[Save]** button.

Manage Access

Please specify Form Access:

Username: wegloff
Name: Wilbur Egloff
Email: segloff@gmail.com

*Form Access: All Forms including Budget
 Non-Budget Forms

3. Adding Non-UMD Participants

Note: In order to add a non-UMD participant, you need to know the **participant's Grants.gov username**.

- a. Click on the **[Participants]** tab.
- b. Click on the **[Add by Username]** button.

FORMS **PARTICIPANTS** ACTIVITY DETAILS GRANTOR IMAGE PREVIEW GRANTOR VALIDATION

Workspace Participants:

1-2 of 2 Records

Username	Participant Name	Phone Number	Email	Form Access	Authorized to Submit	Actions
christinekang	Christine Kang	3014055736	ckang1@umd.edu	All	No	Remove Make Owner Manage Access

- c. Enter the person's Username in the field and click the Search button.

Add Participant by Username

Please enter Username and click Search, then specify Form Access:

*Username:

- d. Choose the access that this participant should have, then click the **[Save]** button.

Manage Access

Please specify Form Access:

Username: wegloff
Name: Wilbur Egloff
Email: segloff@gmail.com

*Form Access: All Forms including Budget
 Non-Budget Forms

Save Cancel

4. Removing a Participant

- a. Click on the **[Participants]** tab.
b. Click the **[Remove]** link under Actions.

FORMS PARTICIPANTS ACTIVITY DETAILS GRANTOR IMAGE PREVIEW GRANTOR VALIDATION

Workspace Participants: Export Detailed Data Add from Workspace Organization Add by Username ?

1-2 of 2 Records

Username	Participant Name	Phone Number	Email	Form Access	Authorized to Submit	Actions
christinekang	Christine Kang	3014055736	ckang1@umd.edu	All	No	Remove Make Owner Manage Access
jdown0001	John Down	3014056263	oraera@umd.edu	All	Yes	Remove Make Owner Manage Access

1-2 of 2 Records

5. More information may be found on the [grants.gov online user guide](#).

Submitting to the AOR

Once you have completed the application, you need to submit the workspace to the AOR.

1. When all the forms are in a **PASSED** status, click on the **[Check Application]** button for errors.

The screenshot shows a workspace management interface with tabs for FORMS, PARTICIPANTS, ACTIVITY, DETAILS, GRANTOR IMAGE, and PREVIEW GRANTOR VALIDATION. The 'Check Application' button is highlighted in orange. Below the buttons is a table of application package forms.

Include in Package	Form Name (Click to Preview)	Requirement	Form Status	Last Updated Date/Time	Locked By	Actions
<input checked="" type="checkbox"/>	Application for Federal Assistance (SF-424) [V2.1]	Mandatory	Passed [Locked]	Nov 09, 2017 11:35:48 AM EST	Christine Kang	Unlock Download Upload Reuse Webform
<input type="checkbox"/>	Objective Work Plan [V1.0]	Optional	---	---	---	Lock Download Upload Reuse

2. If there are no errors found, click on the **[Preview Grantor Validation]** tab.

The screenshot shows the workspace management interface with the 'PREVIEW GRANTOR VALIDATION' tab highlighted in orange.

3. Click on the **[Request Grantor Validation]** button. This will generate a validation to show any agency errors prior to the submission. This process may take some time depending on the number of forms that you have in your workspace.

The screenshot shows the 'PREVIEW GRANTOR VALIDATION' page with the 'Request Grantor Validation' button highlighted in orange. The page contains instructions and a disclaimer.

Click Request Grantor Validation button to find out what submission errors and warnings you would receive from the grant-making agency if you submitted your application package in its current state.

- Grants.gov allows one request per Workspace to be active at a time.
- The status shown does not automatically update. Use the Refresh Status button to get the current status.
- We appreciate your patience while your request is being processed.

DISCLAIMER: This optional feature uses an error checking service provided by the Grantor agency. It has no impact on your ability to submit your application package. Click the help icon for more details.

4. Once the result comes back, click the **[View]** link under Actions to see any Errors/Warnings and correct as needed.

The screenshot shows the 'Preview Validation Requests' table with the 'View' link highlighted in orange. The table has columns for Requestor, Status, Results, Requested Date/Time, Completed Date/Time, and Actions.

Requestor	Status	Results	Requested Date/Time	Completed Date/Time	Actions
Christine Kang	Request Completed	1 Errors/0 Warnings	Nov 30, 2017 03:36:56 PM EST	Nov 30, 2017 03:36:57 PM EST	View

5. Click on the **[Complete and Notify AOR]** button.

The screenshot shows the workspace management interface with the 'Complete and Notify AOR' button highlighted in orange.

Once you have clicked on the **[Completed and Notified AOR]** button, the process bar will change to green and a message will appear stating “Workspace successfully completed and AOR notified”.

The screenshot shows the 'MANAGE WORKSPACE' page with the 'Completed and Notified AOR' status highlighted in orange. The page shows a progress bar with steps: Created, Forms Passed, Completed and Notified AOR, Submit, and Agency Received. A message box at the bottom states 'Workspace successfully completed and AOR notified'.

Workspace Process Bar Reference

Workspace Progress Bar



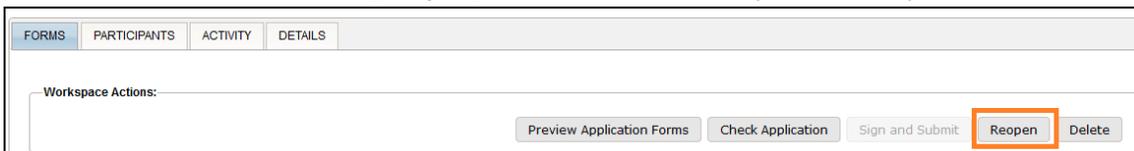
Green with Checkmark in Circle: Completed that step.

Blue with Empty Circle: Future step that is not yet completed. Previous steps must first be completed to perform this step.

Red with Ellipsis: Currently in progress but not yet completed.

Red with "X" in Circle: Application rejected.

6. If you need to modify any forms after the AOR has been notified, please notify your contract administrator then click on the **[Reopen]** button. This will allow you to modify the forms.



7. More information can be found on the [grants.gov online user guide](https://www.grants.gov).