

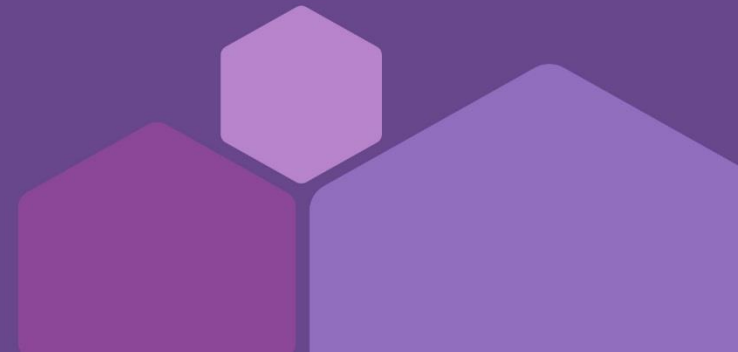
ASSIST / Workspace

ADR Office of Grants & Contracts Training Session
September 19, 2017



SIU MEDICINE
FORWARD. FOR YOU.

NIH ASSIST



NIH ASSIST

- How to search and select your application
- How to edit your application
- How to save your completed work in your application
- How to print your application



SEARCH FOR ASSIST APPLICATION

Welcome to the Application Submission System & Interface for Submission Tracking (ASSIST)



INITIATE APPLICATION

Funding Opportunity Announcement #
(Example: PA-XX-XXX or LITC-ABCD-XX-000)

Go

The National Institutes of Health posts Funding Opportunity Announcements (FOAs) in the [NIH Guide for Grants & Contracts](#) and in [Grants.gov's Search Grants](#). Each resource has robust search functionality to identify opportunities of interest. ASSIST can only be used to prepare and submit applications when explicitly stated in the FOA.



SEARCH FOR APPLICATION

Search Applications

SEARCH FOR ASSIST APPLICATION

Search for Applications

Application Identifier:

Application Project Title:

Agency:

PD/PI First Name:



PD/PI Middle Name:


PD/PI Last Name:


Lead Applicant Organization:

Submission Status: (select all that apply)
 Work in Progress
 All Components Final
 Ready for Submission
 Submitted
 Submission Errors
 Abandoned

Hide Abandoned Applications?

Submission Date: from  to 

Project Start Date: 

Project End Date: 

Variety of methods to search, such as PI last name, application status, or just select the “Search” button, depending on the number of applications your assigned to in the system.

SELECT ASSIST APPLICATION

Search for Application Results

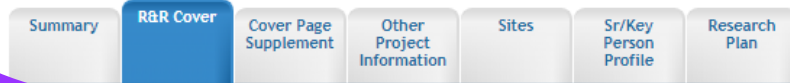
1 - 2 of 2 records, Page 1 of 1

Application Identifier	Application Project Title	Agency	PD/PI Name	Lead Applicant Organization	Submission Status	Submission Date	Project Start Date	Project End Date	Action
191950	SAMPLE SBIR Application	NIH	Broccardo, Gabriella	SOUTHERN ILLINOIS UNIVERSITY SCH OF MED	Work in Progress				Contact
202488	SAMPLE APPLICATION: ASSIST TRAINING 9/19/17	NIH	Broccardo, Gabriella	SOUTHERN ILLINOIS UNIVERSITY SCH OF MED	Work in Progress				Select

“Select” the application you’re working on.

WORKING IN ASSIST

Choose the section, and select “Edit”
This locks the form from others trying to edit.



Application for Federal Assistance
SF 424 (R&R) v2.0 ?

OMB Number: 4040-0001
Expiration Date: 10/31/2019

Expand All * Required field(s)

Edit

1. TYPE OF SUBMISSION

* Type of Submission Pre-Application Application Changed/Corrected Application

2. DATE SUBMITTED

Date Submitted
Applicant Identifier

3. DATE RECEIVED BY STATE

Date Received by State
State Application Identifier

4. A. FEDERAL IDENTIFIER / 4. B. AGENCY ROUTING IDENTIFIER / 4. C. PREVIOUS TRACKING IDENTIFIER

Federal Identifier
Agency Routing Identifier
Previous Grants.gov Tracking ID

5. * APPLICANT INFORMATION

* Organizational DUNS	0384150060000
* Legal Name	SOUTHERN ILLINOIS UNIVERSITY SCH OF MED
Department	
Division	
* Street 1	PO BOX 19616, 801 N RUTLEDGE ST FL 2
Street 2	
* City	SPRINGFIELD
County/Parish	
State	Illinois

SAVING IN ASSIST

After you “Edit,” scroll down to the bottom of the screen and choose:



- **Save and Keep Lock**: Saves work and others cannot edit the form.
- **Save and Release Lock**: ALWAYS choose this selection, if you are not actively working on different parts of the grant. No one else will be able to access the form, even after you log out of the system.
- **Cancel and Release Lock**: Does not save any changes and brings you back to the “Edit” screen.

PRINTING ASSIST APPLICATION

U.S. Department of Health & Human Services



Application Submission System & Interface for Submission Tracking (ASSIST)
Sponsored by the National Institutes of Health



Actions ?

MANAGE ACCESS

PREVIEW APPLICATION

VIEW STATUS HISTORY

UPDATE SUBMISSION STATUS

COPY APPLICATION

DELETE APPLICATION

Home > Search for Applications > Application Search Results > Application Information

Hide Navigation

Application Information ?

Tip:

- Some actions (e.g., Preview Application) are only available from this screen. The Return to Application action can be used to return to this screen.

Summary

R&R Cover

Cover Page Supplement

Other Project Information

Sites

Sr/Key Person Profile

Research Plan



Application Information

Application Identifier:	202488
Application Project Title:	SAMPLE APPLICATION: ASSIST TRAINING 9/19/17
PD/PI Name:	Broccardo, Gabriella
Organization:	Board of Trustees of Southern Illinois University
Project Period:	
Status:	Work in Progress Submit Application
Status Date:	2017-09-15 08:44:50.000 AM EDT

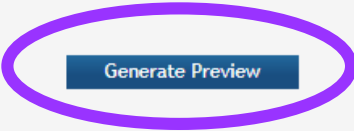
PRINTING ASSIST APPLICATION

Preview Application

Tips:

- Fellowship applicants: Make sure all required attachments marked with "*" are uploaded to the Fellowship Supplement form prior to previewing the application.
- ASSIST allows one application preview request to be active at a time.
- The Status shown does not automatically update - use the Refresh Status button to get current status.
- Previewing a large application image can take several minutes. You may want to view the last one available.

User	Status Date	Status	Action
Broccardo, Gabriella Racine	Fri Sep 15 15:21:23 EDT 2017	Preview Available	View



PRINTING ASSIST APPLICATION

Preview Application

Tips:

- Fellowship applicants: Make sure all required attachments marked with "*" are uploaded to the Fellowship Supplement form prior to previewing the application.
- ASSIST allows one application preview request to be active at a time.
- The Status shown does not automatically update - use the Refresh Status button to get current status.
- Previewing a large application image can take several minutes. You may want to view the last one available.

User	Status Date	Status	Action
Broccardo, Gabriella Racine	Fri Sep 15 15:21:23 EDT 2017	Preview Available	View
Broccardo, Gabriella Racine	Mon Sep 18 16:17:28 EDT 2017	Waiting to Process	

[Refresh Status](#)

Be patient, it may take a few minutes to generate the preview of the application depending on how many users are in the system.

After a few moments, choose "Refresh Status"

PRINTING ASSIST APPLICATION

Preview Application ?

Tips:

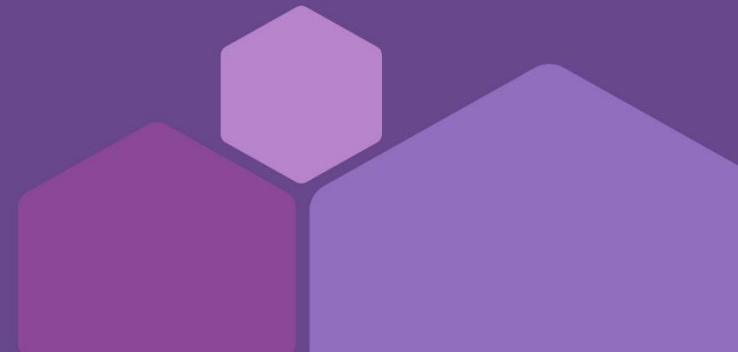
- Fellowship applicants: Make sure all required attachments marked with **^{*} are uploaded to the Fellowship Supplement form prior to previewing the application.
- ASSIST allows one application preview request to be active at a time.
- The Status shown does not automatically update - use the Refresh Status button to get current status.
- Previewing a large application image can take several minutes. You may want to view the last one available.

User	Status Date	Status	Action
Broccardo, Gabriella Racine	Mon Sep 18 16:17:40 EDT 2017	Preview Available	View

[Generate Preview](#)

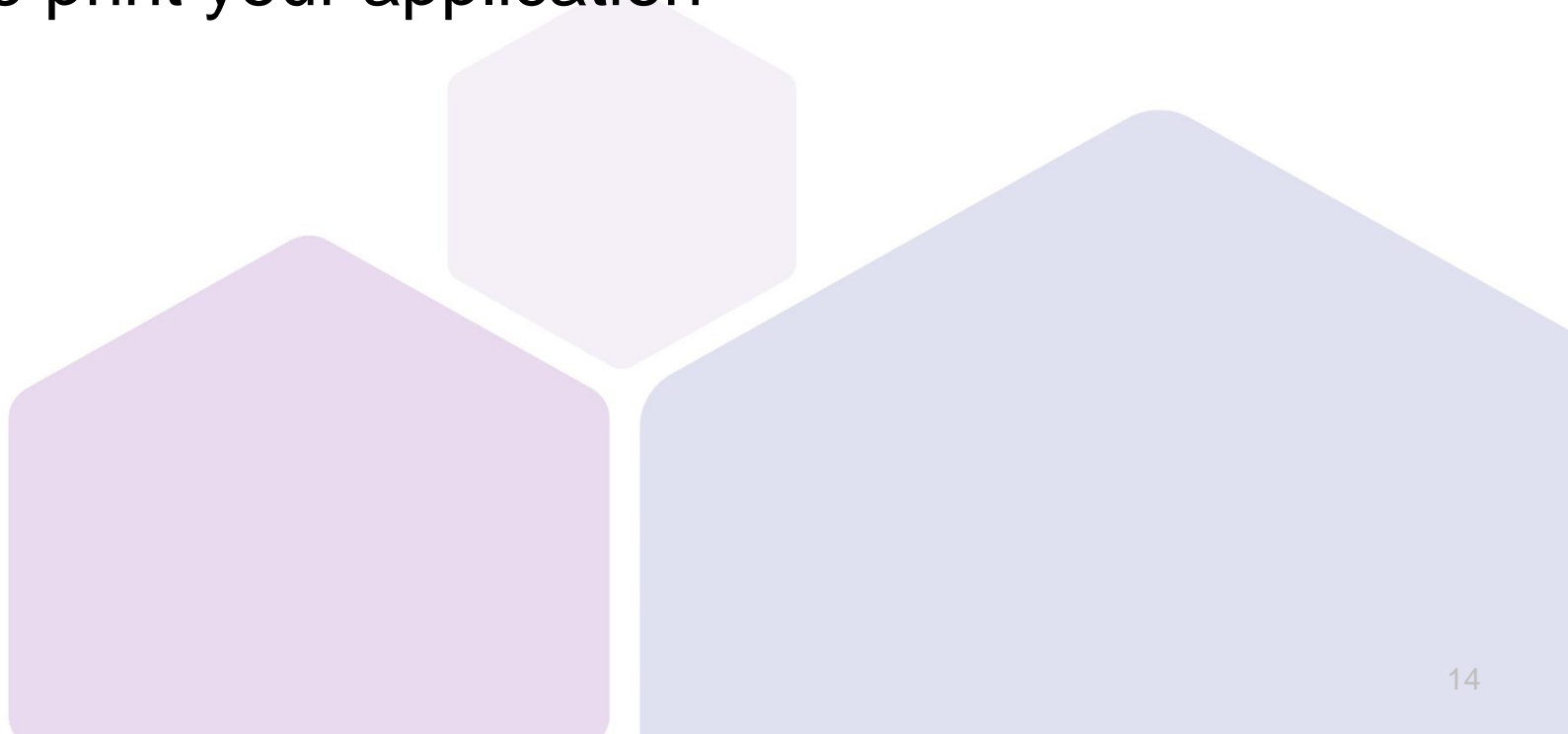
When the Preview is Available, choose the “View” button to open a PDF version of your grant application, which you can save to your computer or print. The PDF will include the application and all attachments.

**www.grants.gov
Workspace**



GRANTS.GOV WORKSPACE

- How to search and select your application (Manage Workspace)
- How to edit your application
- How to save your completed work in your application
- How to print your application



MANAGE WORKSPACES

The screenshot displays the Grants.gov Applicant Center interface. At the top, there is a navigation bar with links for HELP, MANAGE SUBSCRIPTIONS, MANAGE ACCOUNT, and LOGOUT. A search bar is present with a dropdown menu set to 'Grant Opportunities' and a 'GO' button. Below the navigation bar, a secondary menu includes HOME, LEARN GRANTS, SEARCH GRANTS, APPLICANTS (highlighted), GRANTORS, SYSTEM-TO-SYSTEM, FORMS, OUTREACH, and SUPPORT. The main content area is titled 'APPLICANT CENTER' and features a left-hand sidebar with a 'WELCOME' message for Gabriella R. Broccardo and a list of navigation links. The 'Manage Workspaces' link is circled in purple. The main content area contains four informational cards: 1) 'LEGACY PDF APPLICATION PACKAGE RETIRING' with a red warning icon and a 'Learn about Next Steps Here' button; 2) 'APPLY USING WORKSPACE' with a blue icon and a 'Learn about Grants.gov Workspace Functionality' button; 3) 'GRANTS.GOV COMMUNITY BLOG' with a red RSS icon and a 'Visit the Grants.gov Community Blog' button; 4) 'WEBFORMS IN WORKSPACE' with a blue icon and a 'Video Tutorial on Webforms' button.

GRANTS.GOV *Applicant Center*

APPLICANT CENTER

WELCOME:
Gabriella R. Broccardo

GRANT APPLICATIONS

- » Apply for Grants
- » Track Application Status
- » **Manage Workspaces**

APPLICANT MANAGEMENT

- » Manage Applicants
- » Manage Organization Profile

APPLICANT RESOURCES

- » Workspace Overview
- » Applicant Eligibility
- » Applicant Training
- » Applicant FAQs
- » Adobe Software Compatibility
- » Submitting UTF-8 Special Characters
- » Encountering Error Messages

LEGACY PDF APPLICATION PACKAGE RETIRING

The legacy PDF application package will be retired on December 31, 2017, which will end the 2+ year lead time to transition to applying with Workspace.

[Learn about Next Steps Here »](#)

APPLY USING WORKSPACE

Workspace is the standard way to apply for grants on Grants.gov. You and members of your grants team may simultaneously access and fill out different webforms or PDF forms. Applicants can also reuse workspace forms for future opportunities.

[Learn about Grants.gov Workspace Functionality »](#)

GRANTS.GOV COMMUNITY BLOG

Stay up to date with the latest updates and resources on the Grants.gov system on the Community Blog. Get previews of release updates, grant process and writing basics, eligibility insights, and #FundingFriday.

[Visit the Grants.gov Community Blog »](#)

WEBFORMS IN WORKSPACE

Online webforms are available to make the application process more accessible for you. Fill out and complete grant application forms in your web browser using Workspace. Resources are available in the online user guide and Grants.gov YouTube channel.

[Video Tutorial on Webforms »](#)

SELECT WORKSPACE

HELP | MANAGE SUBSCRIPTIONS | MANAGE ACCOUNT | LOGOUT

GRANTS.GOV™
FIND. APPLY. SUCCEED.®

SEARCH: Grant Opportunities ▾ Enter Keyword... **GO**

HOME | LEARN GRANTS ▾ | SEARCH GRANTS | **APPLICANTS ▾** | GRANTORS ▾ | SYSTEM-TO-SYSTEM ▾ | FORMS ▾ | OUTREACH ▾ | SUPPORT

GRANTS.GOV > Applicants > Manage Workspaces

MANAGE WORKSPACES ?

Please enter criteria and click Search:

Funding Opportunity Number: Workspace ID:

Funding Opportunity Title: Workspace DUNS:

CFDA Number:

Competition ID: Last Activity Date: From:

Opportunity Package ID:

Workspace Status:

- New
- In Progress
- Ready for Submission
- Submitted
- Archived

Search

Results:

0-0 of 0 Records

Workspace ID	Workspace DUNS	Workspace Status	Funding Opportunity Number	Funding Opportunity Title	Workspace Owner	Last Activity Date	Actions
0-0 of 0 Records							

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GRANTS.GOV Applicant Support
1-800-518-4726
support@grants.gov

SELECT WORKSPACE

Results: Enter MPIN for Organization Access Export Detailed Data

1-3 of 3 Records 1

Workspace ID	Workspace DUNS	Workspace Status	Funding Opportunity Number	Funding Opportunity Title	Workspace Owner	Last Activity Date	Actions
WS00067875	0384150060000	New	PA-16-160	NIH Research Project Grant (Parent R01)	Gabriella R Broccardo	09/15/2017	Manage Workspace

1-3 of 3 Records 1

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GRANTS.GOV Applicant Support
1-800-518-4726
support@grants.gov

EDIT WORKSPACE

GRANTS.GOV > Applicants > Manage Workspace

MANAGE WORKSPACE

Created
 Fill Out Forms
 Complete and Notify AOR
 Submit
 Agency Received



PA-16-160 - PKG0022267
 NIH Research Project Grant (Parent R01)
 Department of Health and Human Services
 National Institutes of Health

Application Filing Name: SAMPLE APPLICATION: Workspace Training 9/19/17 [Edit Name]

Workspace ID: WS00067875

Workspace Status: New

Opening Date: Apr 17, 2016

AOR Status: Active

Last Submitted Date: ---

Closing Date: May 07, 2019

Workspace Owner: Gabriella R Broccardo

SAM Expiration Date: Nov 29, 2017

DUNS: 0384150060000

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

Workspace Actions:

Application Package Forms - Users are encouraged to follow [antivirus best practices](#) when Downloading Instructions and Forms:

[Download Instructions »](#)

Include in Package	Form Name (Click to Preview)	Requirement	Form Status	Last Updated Date/Time	Locked By	Actions
<input checked="" type="checkbox"/>	SF424 (R & R) [V2.0]	Mandatory	---	---	---	Lock Download Upload Reuse Webform
<input checked="" type="checkbox"/>	PHS 398 Cover Page Supplement [V3.0]	Mandatory	---	---	---	Lock Download Upload Reuse Webform
<input checked="" type="checkbox"/>	Research And Related Other Project Information [V1.3]	Mandatory	---	---	---	Lock Download Upload Reuse Webform
<input checked="" type="checkbox"/>	Project/Performance Site Location(s) [V2.0]	Mandatory	---	---	---	Lock Download Upload Reuse Webform
<input checked="" type="checkbox"/>	Research and Related Senior/Key Person Profile (Expanded) [V2.0]	Mandatory	---	---	---	Lock Download Upload Reuse Webform
<input checked="" type="checkbox"/>	PHS 398 Research Plan [V3.0]	Mandatory	---	---	---	Lock Download Upload Reuse Webform
<input type="checkbox"/>	Research & Related Budget [V1.3]	Optional	---	---	---	Lock Download Upload Reuse Webform
<input type="checkbox"/>	R & R Subaward Budget Attachment(s) Form 5 YR 30 ATT [V1.3] <i>MANAGE SUBFORMS: 0</i>	Optional	---	---	---	Lock Download Upload Reuse Webform
<input type="checkbox"/>	PHS 398 Modular Budget [V1.2]	Optional	---	---	---	Lock Download Upload Reuse Webform
<input type="checkbox"/>	PHS Inclusion Enrollment Report [V1.0]	Optional	---	---	---	Lock Download Upload Reuse Webform
<input type="checkbox"/>	PHS Assignment Request Form [V1.0]	Optional	---	---	---	Lock Download Upload Reuse Webform

EDIT WORKSPACES

5. APPLICANT INFORMATION:

Organizational DUNS:

0384150060000

Legal Name:

Board of Trustees of Southern Illinois University *

Department:

Division:

Street1:

Street2:

City:

County / Parish:

State:

Choose State... *

Country:

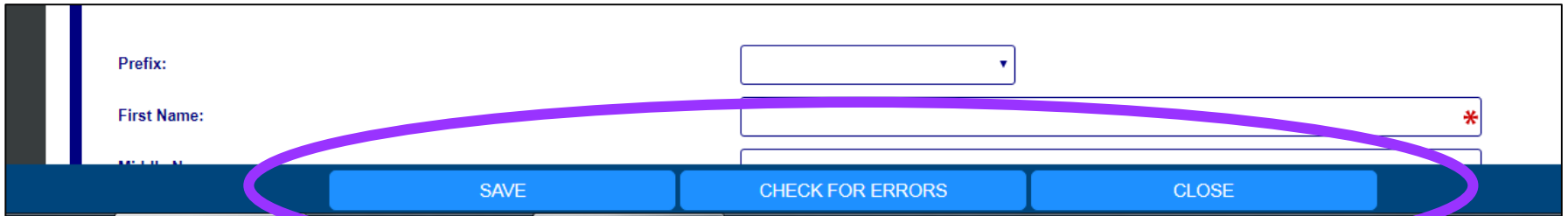
USA: UNITED STATES *

ZIP / Postal Code:

Complete text boxes.

* = mandatory

SAVE WORKSPACE



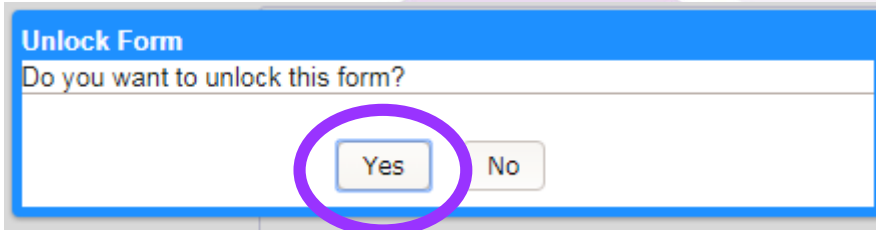
Prefix:

First Name: *

Middle Name:

- **SAVE**: Saves work and continue in same form.
- **CHECK FOR ERRORS**: Ensures all mandatory fields are completed. However, does not check for accuracy based on Program Announcement mandatory fields.
- **CLOSE**: Exit out of form.

***DO NOT LOCK, unless actively working on form.



Unlock Form

Do you want to unlock this form?

PRINT WORKSPACE APPLICATION

MANAGE WORKSPACE

Created
 Fill Out Forms
 Complete and Notify AOR
 Submit
 Agency Received



PA-16-160 - PKG00222267
 NIH Research Project Grant (Parent R01)
 Department of Health and Human Services
 National Institutes of Health

Application Filing Name: SAMPLE APPLICATION: Workspace Training 9/19/17 [Edit Name]
 Workspace ID: WS00067875 Workspace Status: In Progress
 AOR Status: Active Last Submitted Date: ---
 Workspace Owner: Gabriella R Broccardo SAM Expiration Date: Nov 29, 2017

Opening Date: Apr 17, 2016
 Closing Date: May 07, 2019
 DUNS: 0384150060000

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

Workspace Actions:

Application Package Forms - Users are encouraged to follow [antivirus best practices](#) when Downloading Instructions and Forms:

Include in Package	Form Name (Click to Preview)	Requirement	Form Status	Last Updated Date/Time	Locked By	Actions
<input checked="" type="checkbox"/>	SF424 (R & R) [V2.0]	Mandatory	In Progress	Sep 15, 2017 03:28:33 PM EDT	---	Lock Download Upload Reuse Webform
<input checked="" type="checkbox"/>	PHS 398 Cover Page Supplement [V3.0]	Mandatory	---	---	---	Lock Download Upload Reuse Webform
<input checked="" type="checkbox"/>	Research And Related Other Project Information [V1.3]	Mandatory	In Progress	---	---	Lock Download Upload Reuse Webform
<input checked="" type="checkbox"/>	Project/Performance Site Location(s) [V2.0]	Mandatory	---	---	---	Lock Download Upload Reuse Webform
<input checked="" type="checkbox"/>	Research and Related Senior/Key Person Profile (Expanded) [V2.0]	Mandatory	---	---	---	Lock Download Upload Reuse Webform
<input checked="" type="checkbox"/>	PHS 398 Research Plan [V3.0]	Mandatory	Passed	Sep 15, 2017 03:23:29 PM EDT	---	Lock Download Upload Reuse Webform
<input type="checkbox"/>	Research & Related Budget [V1.3]	Optional	---	---	---	Lock Download Upload Reuse Webform
<input type="checkbox"/>	R & R Subaward Budget Attachment(s) Form 5 YR 30 ATT [V1.3] <i>MANAGE SUBFORMS: 0</i>	Optional	---	---	---	Lock Download Upload Reuse Webform
<input type="checkbox"/>	PHS 398 Modular Budget [V1.2]	Optional	---	---	---	Lock Download Upload Reuse Webform
<input type="checkbox"/>	PHS Inclusion Enrollment Report [V1.0]	Optional	---	---	---	Lock Download Upload Reuse Webform
<input type="checkbox"/>	PHS Assignment Request Form [V1.0]	Optional	---	---	---	Lock Download Upload Reuse Webform

The “Preview Application Forms” button only generates a PDF of the Application. It does not include attachments.

PRINT WORKSPACE APPLICATION

Credential, e.g., Agency Login:

Project Role: *

Degree Type:

Degree Year:

Attach Biographical Sketch: *

Attach Current & Pending Support:

To print attachments, go to the respective section and choose the “View Attachment” button to open, save, or print a PDF of the attachment.

Questions?

**Contact:
grants@siumed.edu**



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