

### Appendix – Naming Conventions

Grant Note	Subject	Note Type	Category Type
What you are trying to upload?	<b>NAME</b> = brief description or name of 3 <sup>rd</sup> Party from contract, MOU, or resume <b>MM YYYY</b> = Month and Year <b>STATUS</b> = Approved, Proposed, or Signed <b>APP #</b> = Application Number assigned to amendment in GrantSolutions	Internal = Private Correspondence = Public	
120 Day Workplan	120 Day Workplan Proposed	Correspondence	Programmatic Report
424A	424A MM YYYY Proposed	Correspondence	Budget Information Request
Budget Revision	Budget Revision MM YYYY Proposed	Correspondence	Budget Information Request
Contract	Contract NAME MM YYYY Proposed	Correspondence	Programmatic Information Request
Cooperative Agreement	Cooperative Agreement MM YYYY	Correspondence	Programmatic Information Request
Corrective Action Plan	Corrective Action Plan MM YYYY	Correspondence	Policy Request
Correspondence	Correspondence NAME MM YYYY	Correspondence	Other
Curriculum	Curriculum NAME MM YYYY	Correspondence	Programmatic Information Request
Final Federal Financial Report/ 425	Final Financial Report MM YYYY	Correspondence	Budget Information Request
Federal Financial Report/ 425	Financial Report MM YYYY	Correspondence	Budget Information Request
Grant Application	Grant Application	Correspondence	Programmatic Information Request
Marketing Materials	Marketing NAME MM YYYY Proposed	Correspondence	Grantee Marketing Materials
Memorandum of Understanding	MOU NAME MM YYYY Proposed	Correspondence	Programmatic Information Request
Performance Progress Report (PPR)	Performance Progress Report MM YYYY Proposed	Correspondence	Programmatic Report
Policies	Policies NAME MM YYYY	Correspondence	Policy Request
Key Staff Resume and Documentation	Key Staff NAME MM YYYY Proposed	Correspondence	Programmatic Information Request
Revised Documents Requested for Budget Revision Amendment	Revised Docs-Budget Revision APP# MM YYYY	Correspondence	Budget Information Request
Revised Documents Requested for Non-Competing Continuation Application	Revised Docs-Continuation App APP# MM YYYY	Correspondence	Programmatic Information Request
Site Visit Report	Site Visit Report NAME MM YYYY	Correspondence	Site Visit Report
Technical Assistance Documents	Technical Assistance NAME MM YYYY	Correspondence	Programmatic Information Request
Work Plan Revision	Work Plan Revision MM YYYY Proposed	Correspondence	Programmatic Information Request
Incentive Policy	Incentive Policy MM YYYY Proposed	Correspondence	Programmatic Information Request
Gas Cards	Gas Card Policy MM YYYY Proposed	Correspondence	Programmatic Information Request
Medical Care Supportive Services	Service Policy MM YYYY Proposed	Correspondence	Programmatic Information Request
Room and Board Supportive Services	Service Policy MM YYYY Proposed	Correspondence	Programmatic Information Request
On the Job Training Plan	Contract OJT MM YYYY Draft	Correspondence	Programmatic Information Request
New Healthcare Occupational Trainings	Add Occ NAME MM YYYY Proposed	Correspondence	Programmatic Information Request

Grant Note	Subject	Note Type	Category Type
Other Documents	NAME MM YYYY	Correspondence	Other

**Be careful not to use acronyms, abbreviations, alternate names, alternate spellings, or misspellings.  
Use acronyms and abbreviations only in the NAME of the subject when absolutely necessary due to character limitations.**

Grant Note	Explanation
<b>What you are trying to upload?</b>	
120 Day Workplan	120 Day Workplan that the organization submitted January 2011
424A	Standard Form 424A
Budget Revision	Any update to the grantee budget that does not meet the “significant re-budgeting” threshold (cumulative transfers among budget cost categories totaling 25% of project costs or \$250,000, whichever is lower) requiring a full budget modification through a GrantSolutions Amendment. A budget revision below 25% of project costs or \$250,000 should include an updated budget narrative or line item budget reflecting the changes.
Contract	Any contract or service agreement between a grantee and a third party to acquire commercial goods or services using federal funds. Upload the executed contract, procurement policies, and any requested additional documentation (such as sole source agreements or justifications) in the grant note.
Cooperative Agreement	A financial assistance support mechanism used when there will be substantial Federal programmatic involvement. The Cooperative Agreement document is signed by the Authorizing Official.
Corrective Action Plan	A plan created by the grantee in response to a Non-Compliance Letter issued by the Administration for Children and Families (ACF).
Correspondence	Any documents, such as e-mails or letters, that document grantee and/or ACF action or approval related to programmatic/ administrative aspects of the grant.
Curriculum	Any curriculum documents relating to occupational or soft skills training (ie. syllabi, course catalogues, curriculum overviews, etc.)
Final Federal Status Report/ 425	Standard Form 425 used to report the status of liquidated funds for the budget year. Due annually.
Federal Financial Report/ 425	Standard Form 425 used to report the status of funds and to monitor the financial progress of awards on a semi-annual basis. Due every six months.
Grant Application	The original grant application sent in response to the Funding Opportunity Announcement
Marketing Materials	Any document that the grantee creates to send to the public or that has a public audience. This includes documents such as recruitment materials, brochures, advertisements, press releases, banners, etc.
Memorandum of Understanding	Any Memorandum of Understanding between a grantee and a third party outlining roles and responsibilities of the parties.
Performance Progress Report (PPR)	Semi-annual report submitted by the recipient. Due every six months.
Policies	Any organizational policy that the grantee functions under or creates to run the program. This includes documents such as procurement policies, personnel policies, supportive service policies, incentive policies, training account policies, etc.
Key Staff Resume and Documentation	Any resume for key personnel of the grantee or contractor carrying out programmatic work. Upload the resume, job description, and a description of the hiring process in the grant note.
Revised Documents Requested for Budget Revision Amendment	Any revised documents (424, 424A, Budget Narrative, Indirect Cost Rate Agreement, etc.) that have been requested by ACF as a result of a Budget Modification/Revision that was submitted to ACF for approval.
Revised Documents Requested for Non-Competing Continuation Application	Any revised documents (424, 424A, Budget Narrative, Indirect Cost Rate Agreement, etc.) that have been requested by ACF as a result of a Continuation Application that was submitted.
Site Visit Report	A report completed by ACF after conducting a site visit to a grantee location.
Technical Assistance Documents	Documents created during the provision of technical assistance such as reports (Blueprints), program maps, career ladders, etc.

Grant Note	Explanation
Work Plan Revision	This would be any document that reflects a change to the current work plan that would not meet the “change in scope” threshold required for an amendment.
Incentive Policy	Before the organization implements an incentive/ gift card policy, the grantee will upload the policy containing the following items for prior approval from their program specialist.
Gas Cards	Before the organization implements the use of gas cards as an incentive or supportive service, the grantee will upload the policy and other documentation to receive approval from their program specialist.
Medical Care Supportive Services	Before the organization implements the use of such supportive service, the grantee will upload the policy and other documentation to receive approval from their program specialist.
Room and Board Supportive Services	Before the organization implements the use of such supportive service, the grantee will upload the policy and other documentation to receive approval from their program specialist.
On the Job Training Plan	Before the organization implements the use of OJT, the grantee will upload the contract to receive approval from their program specialist.
New Healthcare Occupational Trainings	Before the organization can train for a new healthcare occupation, the grantee will upload a justification to receive approval from their program specialist.
Other Documents	If the document to be uploaded does not fit in any of the above categories (after checking carefully), please contact your program specialist before uploading the grant note in order to receive the new naming convention for the document.