### Appendix – Naming Conventions

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

**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.**

<table>
<thead>
<tr>
<th>Grant Note</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>120 Day Workplan</td>
<td>120 Day Workplan that the organization submitted January 2011</td>
</tr>
<tr>
<td>424A</td>
<td>Standard Form 424A</td>
</tr>
<tr>
<td>Budget Revision</td>
<td>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.</td>
</tr>
<tr>
<td>Contract</td>
<td>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.</td>
</tr>
<tr>
<td>Cooperative Agreement</td>
<td>A financial assistance support mechanism used when there will be substantial Federal programmatic involvement. The Cooperative Agreement document is signed by the Authorizing Official.</td>
</tr>
<tr>
<td>Corrective Action Plan</td>
<td>A plan created by the grantee in response to a Non-Compliance Letter issued by the Administration for Children and Families (ACF).</td>
</tr>
<tr>
<td>Correspondence</td>
<td>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.</td>
</tr>
<tr>
<td>Curriculum</td>
<td>Any curriculum documents relating to occupational or soft skills training (ie. syllabi, course catalogues, curriculum overviews, etc.)</td>
</tr>
<tr>
<td>Final Federal Status Report/ 425</td>
<td>Standard Form 425 used to report the status of liquidated funds for the budget year. Due annually.</td>
</tr>
<tr>
<td>Federal Financial Report/ 425</td>
<td>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.</td>
</tr>
<tr>
<td>Grant Application</td>
<td>The original grant application sent in response to the Funding Opportunity Announcement</td>
</tr>
<tr>
<td>Marketing Materials</td>
<td>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.</td>
</tr>
<tr>
<td>Memorandum of Understanding</td>
<td>Any Memorandum of Understanding between a grantee and a third party outlining roles and responsibilities of the parties.</td>
</tr>
<tr>
<td>Performance Progress Report (PPR)</td>
<td>Semi-annual report submitted by the recipient. Due every six months.</td>
</tr>
<tr>
<td>Policies</td>
<td>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.</td>
</tr>
<tr>
<td>Key Staff Resume and Documentation</td>
<td>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.</td>
</tr>
<tr>
<td>Revised Documents Requested for Budget Revision Amendment</td>
<td>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.</td>
</tr>
<tr>
<td>Revised Documents Requested for Non-Competing Continuation Application</td>
<td>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.</td>
</tr>
<tr>
<td>Site Visit Report</td>
<td>A report completed by ACF after conducting a site visit to a grantee location.</td>
</tr>
<tr>
<td>Technical Assistance Documents</td>
<td>Documents created during the provision of technical assistance such as reports (Blueprints), program maps, career ladders, etc.</td>
</tr>
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<td>Grant Note</td>
<td>Explanation</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Work Plan Revision</td>
<td>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.</td>
</tr>
<tr>
<td>Incentive Policy</td>
<td>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.</td>
</tr>
<tr>
<td>Gas Cards</td>
<td>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.</td>
</tr>
<tr>
<td>Medical Care Supportive Services</td>
<td>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.</td>
</tr>
<tr>
<td>Room and Board Supportive Services</td>
<td>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.</td>
</tr>
<tr>
<td>On the Job Training Plan</td>
<td>Before the organization implements the use of OJT, the grantee will upload the contract to receive approval from their program specialist.</td>
</tr>
<tr>
<td>New Healthcare Occupational Trainings</td>
<td>Before the organization can train for a new healthcare occupation, the grantee will upload a justification to receive approval from their program specialist.</td>
</tr>
<tr>
<td>Other Documents</td>
<td>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.</td>
</tr>
</tbody>
</table>