

First-Time Federal Grant Applicant Checklist

The First-Time Federal Grant Applicant Checklist

Everything you have to do before you can apply for your first federal grant — in the order you have to do it.

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Why this exists

Most first-time federal grant applications are rejected before a single human reviews the project. The application gets bounced for missing a registration step, an expired form, a wrong file format, or a deadline that was actually 24 hours earlier than the applicant thought.

This checklist is the boring infrastructure work nobody tells you about — the stuff that has to be done **weeks before** you start writing the actual project narrative. If you skip any of it, your application doesn't reach a reviewer.

It is *not* a guide to writing a winning grant. It is the airport security checkpoint you have to clear before you're even allowed to board the plane.

Important: This is general information about federal grant application mechanics. It is not legal, financial, or grant-writing advice. Always verify the specific requirements of your Notice of Funding Opportunity (NOFO) on grants.gov before acting.

Phase 0 — Confirm you are eligible (15 minutes, do this first)

Before you spend any time on registrations, confirm your organization is the kind of entity that can receive federal funds.

- Identify your entity type.** Federal grants go to specific categories: state/local government, federally recognized tribes, public/private institutions of higher education, public housing organizations, nonprofits with 501(c)(3) status, for-profit small businesses (limited programs), and individuals (very limited programs).

- Check the “Eligible Applicants” section of the NOFO** for the specific opportunity you’re targeting. If your entity type is not listed, you cannot apply, full stop. There are no exceptions.
- Check whether you need to be incorporated** in a particular state or registered under a particular federal program before you apply.
- Confirm there is no exclusion against your organization** by searching SAM.gov for your entity name. Organizations on the federal exclusion list are barred from receiving federal funds.

If any of these check out, proceed. If not, stop and find a different opportunity — there is no workaround.

Phase 1 — SAM.gov registration (allow 2-4 weeks)

This is the single most underestimated step. SAM.gov registration is mandatory before you can apply for any federal grant, and it routinely takes longer than people expect because it involves IRS validation and CAGE code assignment.

- Get your organization’s legal name, physical address, and TIN/EIN ready.** They must match what the IRS has on file exactly. A trailing comma in your address can cause a rejection.
- Create a Login.gov account** at login.gov for the person who will manage SAM.gov. Use a permanent email address you’ll have access to in 5 years, not a personal Gmail.
- Go to sam.gov/content/entity-registration** and start a new entity registration.
- Request your Unique Entity Identifier (UEI).** This is the federal government’s identifier for your organization. As of April 4, 2022, the UEI replaced the old DUNS number. SAM.gov assigns it during registration.
- Complete the core data section.** Bank account info for ACH payments, business types, and a NAICS code that matches your primary activity.
- Complete the assertions section.** Goods and services your organization provides, EDI capability, disaster relief activities.
- Complete the representations and certifications.** This is the longest section. You’re certifying your compliance with dozens of federal rules — debarment, lobbying, drug-free workplace, etc. Read each one before checking.
- Designate an Entity Administrator.** This is the person SAM.gov will contact for any future updates. Make sure it’s someone who will still be at the organization in 12 months.

- Submit and wait for IRS validation.** This takes 3-10 business days. You'll receive an email confirmation when the registration is "Active."

Common SAM.gov registration failures: - Address doesn't exactly match IRS records (use your IRS Letter 147C to verify) - Bank account info entered with hyphens or spaces - Authorized representative information doesn't match Articles of Incorporation - Entity name uses an abbreviation the IRS doesn't recognize

Renewal: SAM.gov registration expires every 12 months. Set a calendar reminder for 60 days before expiration. An expired registration on the day of submission means an automatic rejection.

Phase 2 — Grants.gov account setup (1 day)

SAM.gov gets you the right to receive federal money. Grants.gov is where you actually submit the application.

- Create a Login.gov account** for each person who will work on the application (you can use the same Login.gov account that owns SAM.gov, but most teams want one per writer).

- Sign in to grants.gov** and link your Login.gov account.

- Add your organization** to your Grants.gov profile using your UEI from Phase 1.

- Request the right roles.** Grants.gov has three application roles:

- **Workspace Manager** — can create and manage application workspaces
- **Authorized Organization Representative (AOR)** — the only role that can hit "Submit"
- **Standard Applicant** — can fill in forms but not submit

- Have the E-Business Point of Contact (EBiz POC) approve your AOR request.** This is a person designated in your SAM.gov registration. They get an email and have to log in to approve. This step regularly takes 1-3 days because the EBiz POC is often someone in finance who doesn't check their email frequently.

- Test that you can create a Workspace.** If you can't, you're missing a role. Fix it now, not 48 hours before the deadline.
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Phase 3 — Read the NOFO like a contract (2-4 hours)

The Notice of Funding Opportunity (also called a FOA, NOFO, or Funding Announcement depending on the agency) is the legal document that defines exactly what you can and cannot do. Most rejections trace back to applicants ignoring something the NOFO said in plain English.

- Download the full NOFO PDF** from the Grants.gov opportunity page. Don't rely on the summary on the website.
- Highlight every “must,” “shall,” and “required.”** These are non-negotiable requirements. Missing any one of them is grounds for rejection without review.
- Note the exact submission deadline, including the time zone.** Federal deadlines are usually 11:59 PM Eastern Time on the closing date. Some are 5:00 PM. A few are noon. Get it wrong and you cannot apply.
- Check the page limits for every section.** The project narrative, abstract, biosketches, and budget justification all have separate page limits. Reviewers are instructed to stop reading at the page limit.
- Check the formatting requirements:** font (usually 11 or 12 point), font face (usually Arial, Times New Roman, or Helvetica), margins (usually 1 inch), line spacing, and file format (almost always PDF).
- Identify every required attachment.** A typical NOFO requires 8-15 separate documents. Make a list.
- Identify the “Eligibility Information” section** and verify your organization meets every requirement.
- Check for cost sharing or matching requirements.** If the NOFO requires a 25% non-federal match, you need to demonstrate where that money is coming from before you apply.
- Check for letters of support requirements.** Some NOFOs require letters from specific entities (state agencies, partner organizations) and these can take weeks to obtain.
- Note who to contact with questions.** Most NOFOs list a program officer who will answer technical questions before the deadline. Use them.

Phase 4 — Pre-application prep (2-6 weeks before deadline)

- Build your application team.** Identify the project director, the budget person, the compliance person, and any subaward recipients. Each person needs to know their deliverables and their deadlines.

- Draft a project budget that adds up.** Federal budgets break down into direct costs (personnel, fringe, travel, equipment, supplies, contractual, other) and indirect costs.
 - Decide your indirect cost rate.** You have three options:
 - **Negotiated Indirect Cost Rate Agreement (NICRA)** — only if your organization already has one with a federal agency
 - **De minimis 10% rate** — most organizations without a NICRA can use this, applied to modified total direct costs
 - **No indirect costs** — some programs forbid them; check the NOFO
 - Collect biosketches** from every key person on the project. NIH and NSF have specific formats; other agencies are more flexible. These take longer to gather than you think.
 - Collect letters of support** from partner organizations. Send the request 4 weeks before the deadline, not one week.
 - Outline the project narrative** before writing it. The NOFO usually specifies the section headings (Significance, Approach, Innovation, etc.). Use exactly those headings.
 - Identify your evaluation plan.** Reviewers want to see how you will measure whether the project worked.
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Phase 5 — Build the application in Workspace (1-3 weeks)

Grants.gov Workspace is the tool you use to assemble and submit the application. It is *not* fast or intuitive. Build the workspace early so the technology problems happen before the deadline, not on it.

- Create a new Workspace** from the opportunity page on Grants.gov.
- Add team members and assign forms** to each person.
- Download the SF-424 family of forms.** Application packages always include SF-424 (the main form), and depending on the program, SF-424A (budget for non-construction), SF-424B (assurances), and SF-LLL (lobbying disclosure).
- Fill in the forms in Adobe Acrobat Reader** — not in your browser, not in Preview on Mac, not in another PDF tool. Workspace forms only render correctly in Acrobat Reader. This is the single most common technical problem on the day of submission.
- Upload each completed form back to Workspace.**
- Upload all required attachments.** PDFs only, unless the NOFO specifies otherwise. File names should not contain special characters or spaces.

- Run the Workspace check.** Grants.gov runs an automated validation that catches missing forms, wrong formats, and other obvious problems.
 - Have the AOR submit at least 48 hours before the deadline.** Submission processing can take hours. Submitting at 11:55 PM on the deadline is how applications get rejected for being late even though the applicant clicked “submit” before midnight.
 - Confirm the “Validated” status.** A successful submission goes through Received → Validated → Agency Tracking. If you only see “Received,” the application is in limbo and you have a problem.
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The 7 most common rejection reasons (and how to avoid them)

These are the reasons applications get rejected before any reviewer sees the project:

1. **Late submission.** The applicant clicked “submit” before the deadline but the application didn’t finish processing until after. **Fix:** Submit 48 hours early, no exceptions.
 2. **SAM.gov registration expired or inactive.** The applicant didn’t realize their registration had lapsed. **Fix:** Set a calendar reminder for 60 days before expiration and renew immediately.
 3. **Missing required attachment.** The NOFO required a specific document, and the applicant didn’t include it. **Fix:** Make a checklist from the NOFO and check off each attachment before submitting.
 4. **Wrong file format.** A required form was submitted as a Word document instead of a PDF, or the PDF was filled in with the wrong tool. **Fix:** PDFs only, filled in Acrobat Reader.
 5. **Page limit exceeded.** The project narrative ran to 16 pages when the limit was 15. **Fix:** Verify page count in the final PDF, not in the source document.
 6. **Ineligible applicant.** The applicant’s entity type was not in the NOFO’s eligibility list. **Fix:** Read the eligibility section before doing any other work.
 7. **Forms from the wrong opportunity package.** The applicant downloaded forms from a previous version of the package after the agency posted an amendment. **Fix:** Always download forms from the current version of the application package, never reuse old downloads.
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What's NOT in this checklist

This document covers the mechanics of submitting a federal grant application. It does not cover:

- How to actually write a competitive project narrative
- How to build a budget that survives review
- How to read between the lines of a NOFO to figure out what reviewers are really looking for
- How to position your organization against the program's stated priorities
- How to respond to reviewer comments and resubmit
- How to manage the post-award reporting requirements

If you want help with any of those, the **Federal Grant Application Starter Kit** (\$39) covers all of it with templates, annotated examples, and a 90-day project plan. Available at grantradar.us/kit.

Resources

- **SAM.gov:** sam.gov
 - **Grants.gov:** grants.gov
 - **Grants.gov Applicant Help:** grants.gov/applicants
 - **OMB Uniform Guidance (the federal regulations governing grants):** [ecfr.gov](https://www.ecfr.gov), Title 2 CFR Part 200
 - **Federal Audit Clearinghouse:** facweb.census.gov
 - **Single Audit (if you receive over \$750,000 in federal awards in a year):** 2 CFR 200 Subpart F
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