



**Grants Online Training
Grants Online – CBS Interface**

**CBS Approvers, ASAP Authorizers,
and Finance Office**

June 2012



New and Updated Processes Related to the Grants

Online-CBS Interface

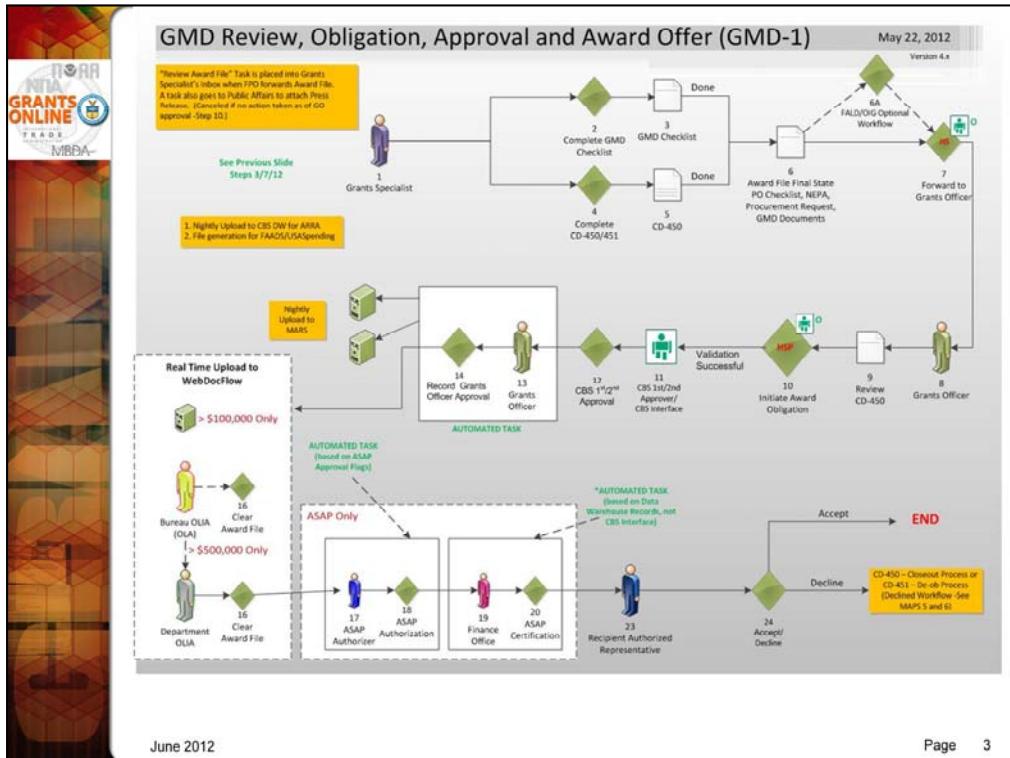
DEMO – GMD Review and Approval Process

1. Current Year or Prior Year Funds
2. ASAP Flags

DEMO - Post Award Processes

1. Declined New Award
2. Declined Amendment
3. Reduction in Funding
4. Correction to ACCS Lines
5. Admin Amendment for Date Changes (GMD)
6. No-Cost Extensions
7. Organization Profile Change Requests
 - a. NonASAP to ASAP
 - b. Organizational Profile Updates
8. Change in High Risk
9. SF-270 Process (ASAP – High Risk Recipients)
10. ASAP Drawdown Request AAR (Agency Review Recipients)
11. Closeout

Q&A



For Interfaced awards CBS Approval tasks in Grants Online will be cleared automatically. Automated clearance of ASAP tasks on Interfaced awards are based on system flags. (See next slide.)



Interface ASAP Flags

▪ Automation of ASAP Authorization task is dependent upon two system flags: “Release to ASAP” and “ASAP Approval”

- Flags are set by the system, not by the user
- Flags do not appear on the Grants Online or CBS screens

▪ Release to ASAP Flag

- Currently set to “No” (All ASAP Profiles will be created as “Unapproved” regardless of ASAP Approval Flag)
- Overrides ASAP Approval Flag
- User will have to Approve ASAP profile on SPDG003 screen then manually clear ASAP Authorization task in Grants Online.

▪ ASAP Approval Flag

- Flag is set based upon OLA threshold. If “Release to ASAP Flag” is set to “Yes”, then awards under threshold will post as Approved and will be automatically cleared in Grants Online.
- Awards over OLA threshold will always post as “Unapproved” to allow for the OLA workflow to complete before the ASAP task is created in Grants Online.
- ASAP Certification task is automated based on the CBS data warehouse (not the interface). There will continue to be a lag time for Grants Online clearance..

ASAP Authorization Amounts
– Grants Specialist and Grants Officer

Financial Assistance Award																									
Recipient Name:	HIGH RESOLUTION SYSTEMS	Federal Share of Cost:	\$350.00 <input type="checkbox"/> Override																						
Street Address:	4120 SHERWOOD DR	Recipient Share of Cost:	\$0.00																						
City, State, Zip:	CRYSTAL LAKE , IL 60012-3030	Total Estimated Cost:	\$350.00																						
CFDA Number:	11.999	Award Number:	NA12GOT9990031																						
		Award Period:	05/01/2012 - 04/30/2013																						
Internal Use Only																									
ASAP Authorize Amount: \$350.00		Prior Year Fund:	<input type="radio"/> Yes <input checked="" type="radio"/> No																						
<p style="background-color: yellow; padding: 5px;">ASAP Authorization amount is entered by the system only on NEW awards to Non-High Risk Recipients.</p>																									
<table border="1"> <tr> <td>Manual Override: <input type="checkbox"/></td> </tr> <tr> <td>Costs Are Revised As Follows:</td> </tr> <tr> <td>Previous Estimated Cost</td> <td>Add</td> <td>Deduct</td> <td>Total Estimated Cost</td> </tr> <tr> <td>\$2600.00</td> <td>\$16.00</td> <td>\$0.00</td> <td>\$2616.00</td> </tr> <tr> <td>Recipient Share of Cost</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td>Total Estimated Cost</td> <td>\$2600.00</td> <td>\$16.00</td> <td>\$0.00</td> </tr> <tr> <td colspan="4">\$2616.00</td> </tr> </table>				Manual Override: <input type="checkbox"/>	Costs Are Revised As Follows:	Previous Estimated Cost	Add	Deduct	Total Estimated Cost	\$2600.00	\$16.00	\$0.00	\$2616.00	Recipient Share of Cost	\$0.00	\$0.00	\$0.00	Total Estimated Cost	\$2600.00	\$16.00	\$0.00	\$2616.00			
Manual Override: <input type="checkbox"/>																									
Costs Are Revised As Follows:																									
Previous Estimated Cost	Add	Deduct	Total Estimated Cost																						
\$2600.00	\$16.00	\$0.00	\$2616.00																						
Recipient Share of Cost	\$0.00	\$0.00	\$0.00																						
Total Estimated Cost	\$2600.00	\$16.00	\$0.00																						
\$2616.00																									
<p style="background-color: yellow; padding: 5px;">ASAP Authorization amount needs to be entered manually by the Grants Specialist on funded amendments.</p>																									
Internal Use Only		Prior Year Funds:	<input type="radio"/> Yes <input checked="" type="radio"/> No																						

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Your Tasks

Review Award File - Approve Award File is complete.

Document Type	Status
All	Open
Apply Filter >>	

10 items found, displaying all items.1

View	Task Received Date	Award Number	Task Id	Task Name	Task Status	Project Title	Document Type	Document Id	Applicant Name	Total Federal Funding	Approved Federal Funding	Start Date
View	06/11/2012	NA12GOT9990039	2536731	Review Award File	In Progress	ASAP Test for Award File Webinar		2252244	The Kohala Center	\$500.00	\$500.00	06/11/2012

Grants Online
Award File Workflow History

Award File # - NA12GOT9990039 Status: Approved: ASAPAuthorizerActions - Not Started ID: 2252244

RFA Name: GrantsOnline-CBS Interface Training - GOT/OCPO
ITFO Number: NOAA-GOT-OCPO-2012-200343
Award File Period: 06/01/2012 - 05/30/2013
Program Officer: GOT One Commerce Program Office (OCPO)
Program Officer: Grants_Student@noaa.gov
Email: testemail@noaa.gov
Grants Specialist: NOAA - Grants Specialist
Federal Funding: \$500.00
Project Title: ASAP Test for Webinar
Organization: The Kohala Center

Phone: 301-555-1212 EXT-ext1
Phone: 301-555-1212 EXT-
Non Federal Funding: \$0.00

Task	Document	Date Assigned	Date Started	Date Completed	Performer	Role	Action Taken	Status
ASAP Authorization	AWARDFILE	06/11/2012 10:37 AM			Joan Gibson	ASAP Authorizer		Not Started
ASAP Authorization	AWARDFILE	06/11/2012 10:37 AM			Peggy Henson	ASAP Authorizer		Not Started
ASAP Authorization	AWARDFILE	06/11/2012 10:37 AM			Heather Cooper	ASAP Authorizer		Not Started
ASAP Authorization	AWARDFILE	06/11/2012 10:37 AM			Hallina Turner	ASAP Authorizer		Not Started
ASAP Authorization	AWARDFILE	06/11/2012 10:37 AM			Darius Porter	ASAP Authorizer		Not Started
ASAP Authorization	AWARDFILE	06/11/2012 10:37 AM			Jerry C. Abalos	ASAP Authorizer		Not Started
Conduct CAMS Second Approval	CD435	06/11/2012 10:37 AM	06/11/2012 10:37 AM	06/11/2012 10:37 AM	Jerry C. Abalos	CAMS Second Approver	CAMS Second Approval Complete	Complete
Automated Task	Conduct CAMS First Approval	CD435	06/11/2012 10:37 AM	06/11/2012 10:37 AM	Joan Gibson	CAMS First Approver	CAMS First Approval Complete	Complete
Automated Task	Review Award File	AWARDFILE	06/11/2012 10:35 AM	06/11/2012 10:36 AM	06/11/2012 10:37 AM	NOAA Grants Officer	Approve Award File	Complete
Review Award File	AWARDFILE	06/11/2012 10:24 AM	06/11/2012 10:25 AM	06/11/2012 10:35 AM	NOAA Grants Specialist	Grants Specialist	Forward To Grants Officer	Complete

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Immediately upon Grants Officer approval of a funded award that is interfaced, the transaction gets sent to CBS but the task stays in the Grants Officer inbox until the CBS actions are complete.

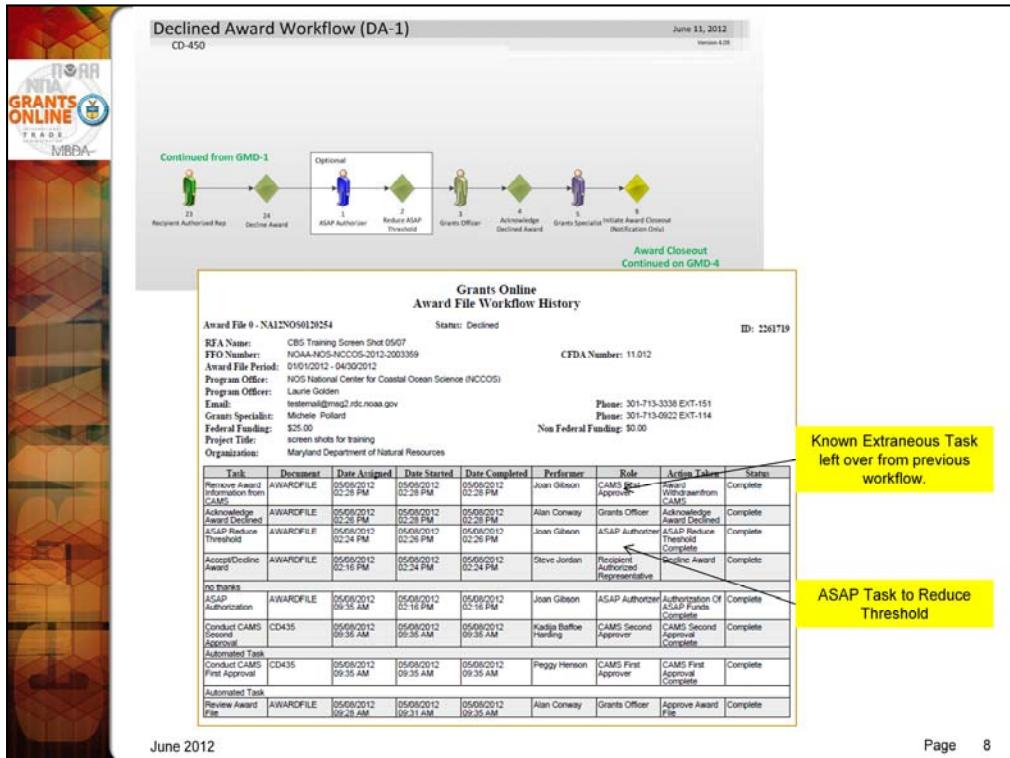
For non-interfaced awards, including all non-NOAA awards, the CBS tasks continue to move to the inboxes of the CBS Approvers and are immediately cleared from the Grants Officer's inbox.

ASAP Screen in CBS – SPDG003

Seq#	Amount	Effective Date	R	Release Date	Interface Status	Status Date	DB
1	500.00	11-JUN-2012	<input checked="" type="checkbox"/>	11-JUN-2012	Authorization marked for release	11-JUN-2012	<input checked="" type="checkbox"/>

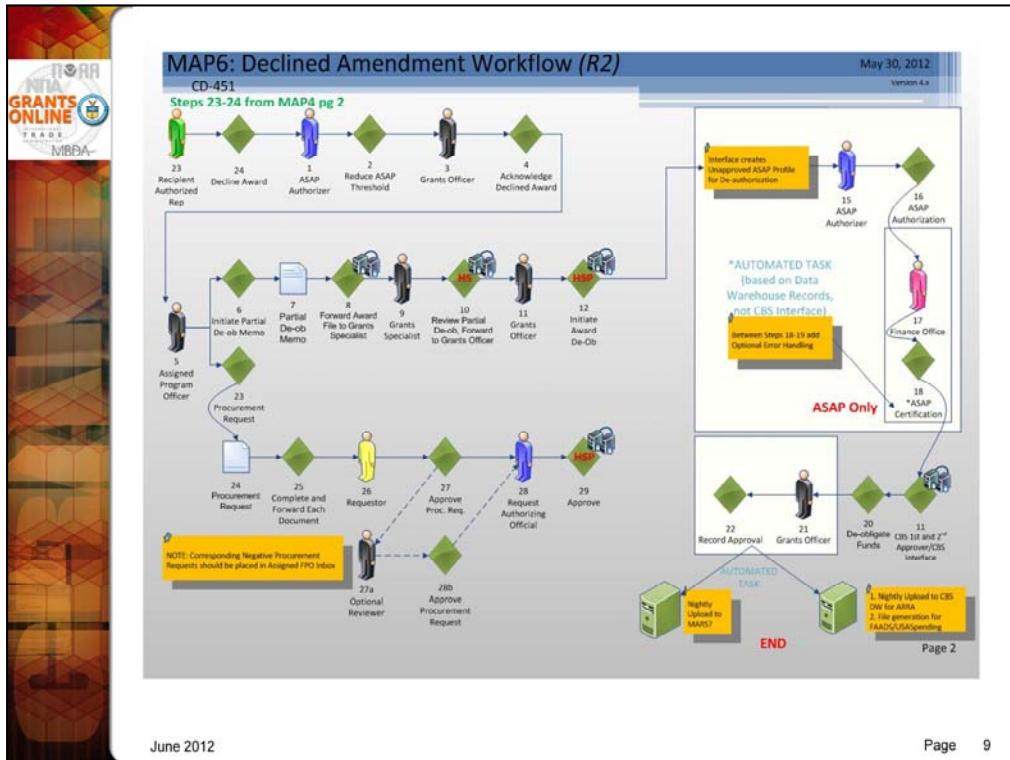
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The ASAP Authorizer task in the Declined Award workflow is not a Profile update or Authorization. Rather, the ASAP Authorizer needs to go directly into ASAP and take an immediate action to prevent the recipient from drawing down funds. According to the requirements for the interface it was decided that the action would be to reduce the threshold amount that the recipient could draw down. Optionally, the ASAP award could be suspended.

When an award is declined by the recipient, the system currently created an extraneous CBS Approver task which was left over from the former workflow prior to implementation of the interface. That task will be automatically closed for interfaced awards. For non-interfaced awards the task should be manually closed by the CBS Approver and then the Help Desk should be notified in order to remove the Closeout date from the Award File. The Award still needs to go through a Financial Closeout process to de-obligate the funds via the interface using the de-obligation memo.

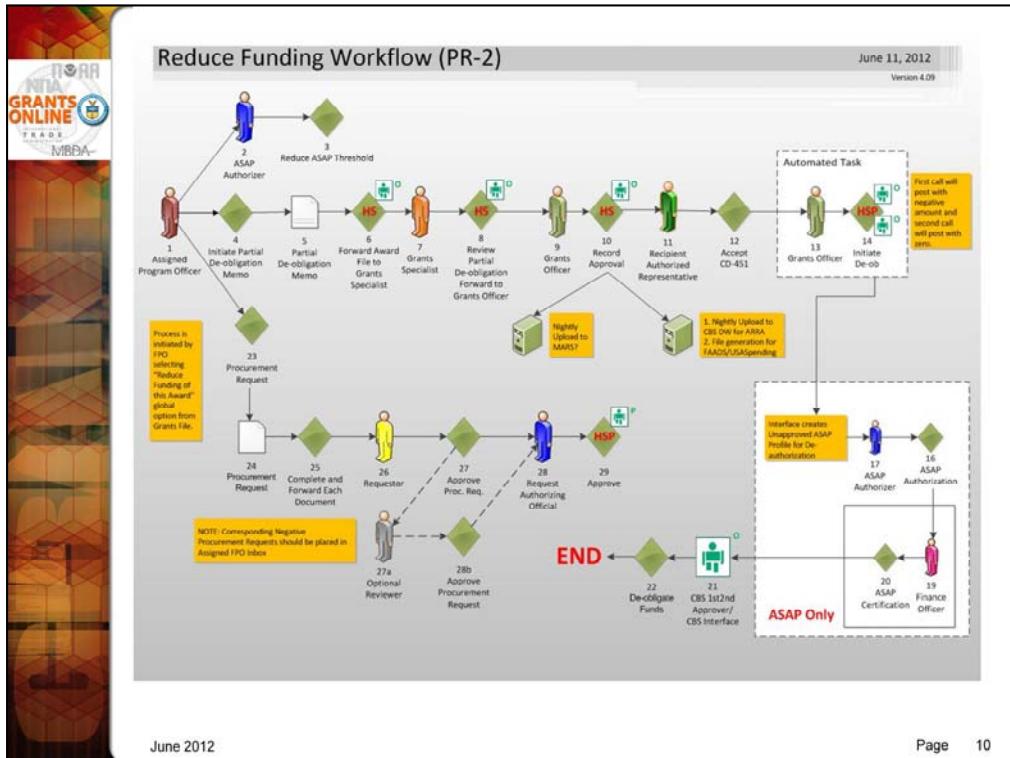


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The Declined Amendment workflow looks just like a Reduction in Funding except that the De-obligation Memo and De-obligating Procurement Request are generated when the Grants Officer acknowledges the declined award as opposed to the Federal Program Officer initiating an action. The ASAP Authorizer actions will be De-authorizations instead of Authorizations.

The Declined Amendment workflow will not be an “Award File in Progress” but will have the amendment number of the Declined Amendment.



The Reduction in Funding workflow follows a very similar process as the Partial Funding Workflow and has the same “Look and Feel”. The big difference for the CBS and ASAP users is that their steps take place AFTER the Recipient accepts the amendment rather than before.

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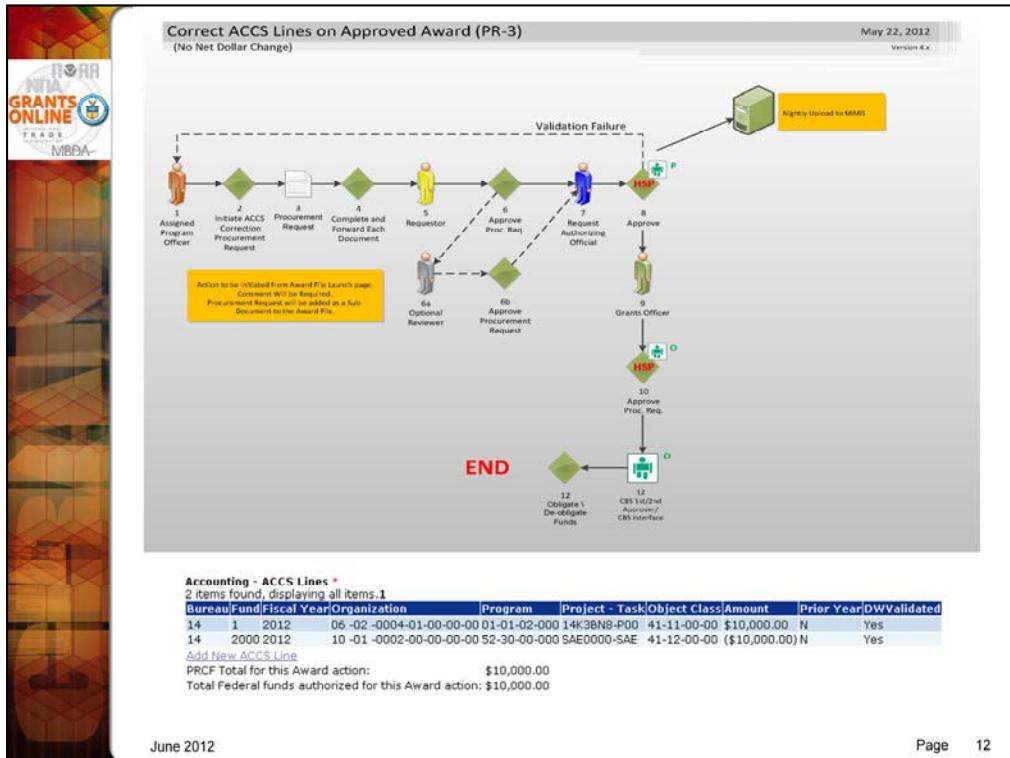
MEMORANDUM:	NOAA Finance Office	
FROM:	Grants Management Division	
SUBJECT:	DE-OBLIGATION	
De-obligation Request for Award: NA12GOT9990023		
Total Federal Funding (entire award):	\$10,000.00	
Recipient Name:	Environmental Action Committee of West Marin	
EIN:	237115368	
DUNS:	793971490	
ASAP ID (if applicable):		
Award Period:	05/01/2012 - 04/30/2013	
Federal Program Officer:	Grant Student00	
Obligation Number:	374000	
Requested De-obligation Amount:	\$100.00	
Item #/MDL	ACCS	Amount
2245494 / 2025338 14 2012 2000 52-30-00-000 SAE00000-SAE 10-01-0002-00-00-00 41-12-00-00 (\$100.00)		
The Grants Management Division has reviewed the subject award. This document serves as authorization to proceed with the de-obligation process.		
Justification for De-obligation: The Grants Management Division has reviewed the subject award. This document serves as authorization to proceed with the de-obligation process.		
<input type="button" value="Spell Check"/> <input type="button" value="Cancel"/> <input type="button" value="PDF"/>		

For a Reduction in Funding action the system creates a "Partial De-obligation Memo" that will be used by the Grants Management Division and the Finance Office.

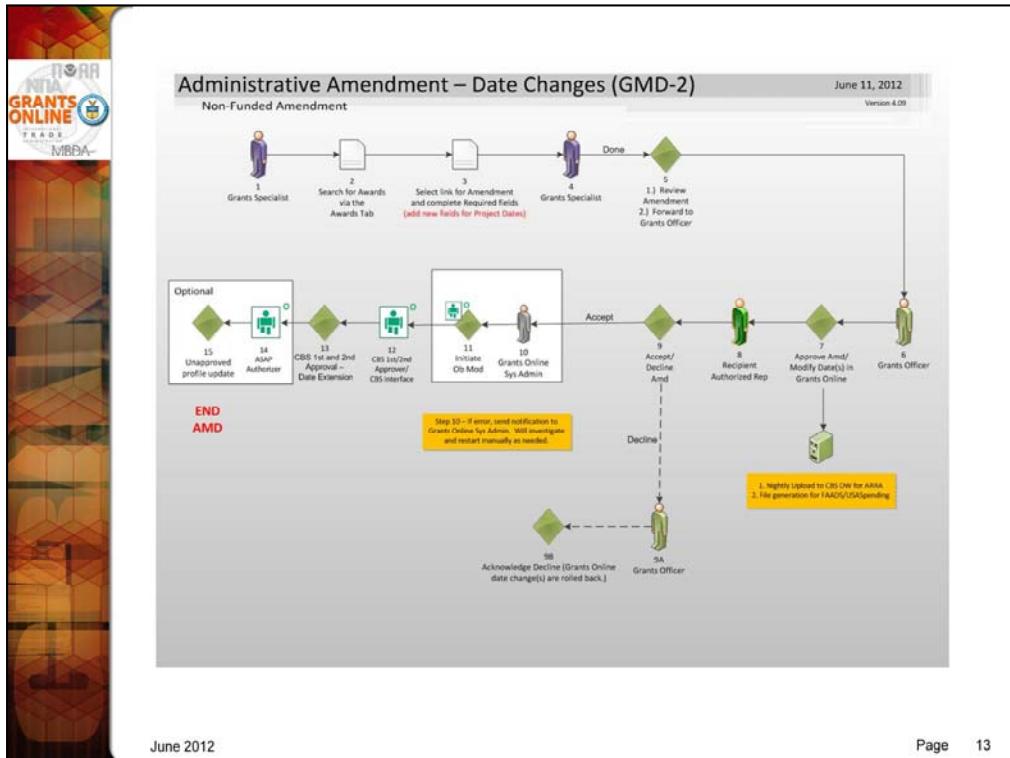
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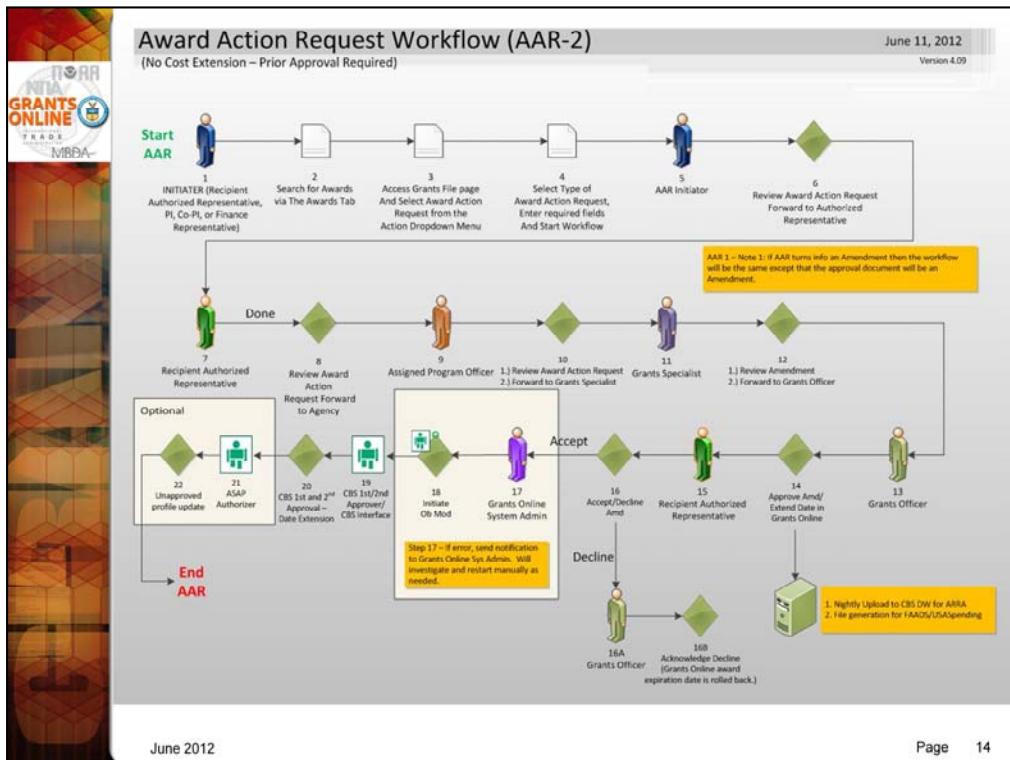
ACCS Information for the Partial De-obligation Memo is retrieved via the Interface based on the fields entered on the Procurement Request.



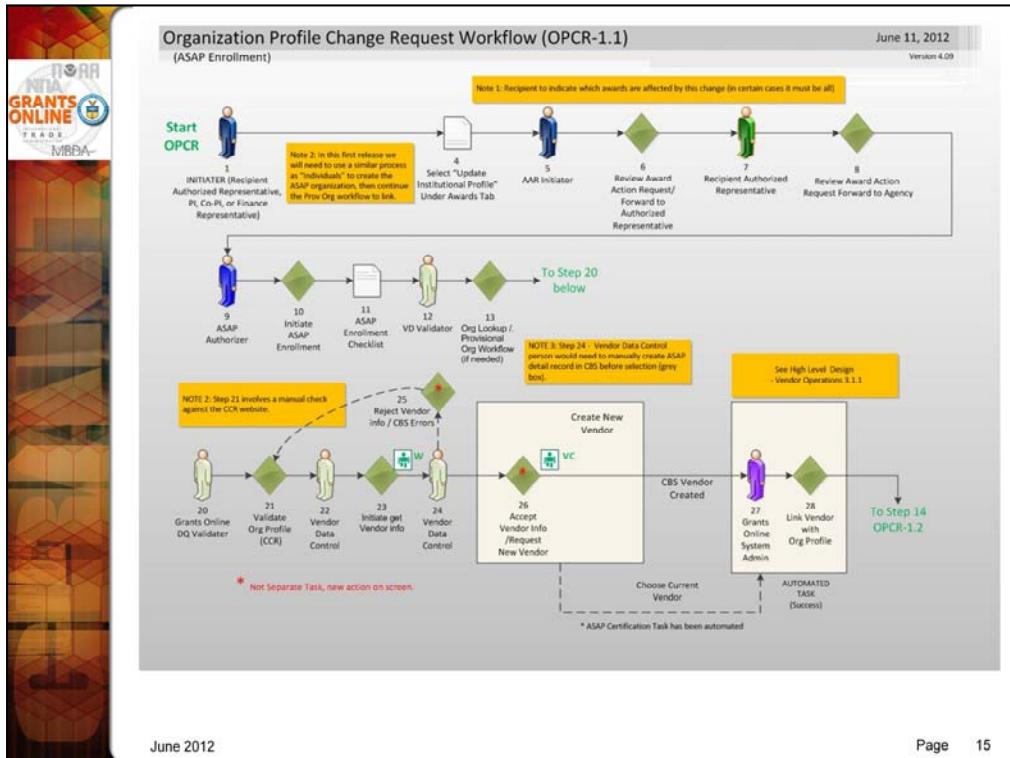
There are NO ASAP actions on the workflow for making corrections to ACCS lines. However, there are CBS Approval steps since this action requires a net-zero modification to the obligation.



The Grants Management Division can now create an administrative amendment to make corrections to Project Start and/or End Dates without requiring the Recipient to submit a No-Cost Extension request. This will result in CBS Approval tasks for a no-cost modification to the obligation and a ASAP Authorizer task only for updating the profile with the date change.



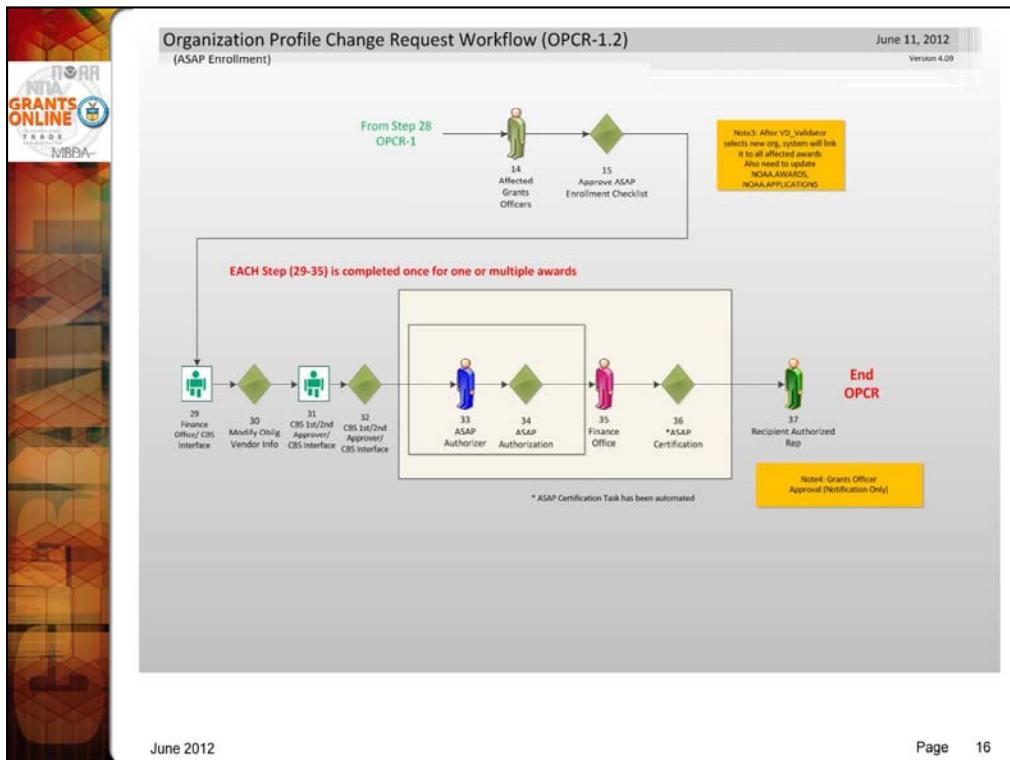
For No Cost Extensions, since project date updates are now going to be updated at CBS the workflow will go through the CBS approval process. For ASAP awards a task will go to the ASAP Authorizer to update the ASAP profile with the new date.



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The ASAP Enrollment workflow starts with a new document in Grants Online called an Organization Profile Change Request. When the request is forwarded to the Agency it comes directly to the ASAP Authorizer.



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Inbox Awards Account Management Help

Organization Profile Change Request
 Organization: Institute for Community Managed Resources (ICMR) (2002469)
 Request ID: 2245527

Profile Field	Current Value	Requested Change
Legal Name or DBA	Institute for Community Managed Resources (ICMR)	<input type="text"/>
Physical Address		
Street Address	123 Main Street	<input type="text"/>
City	Washington	<input type="text"/>
State	DC - District of Columbia	<input type="text"/>
Zip/Postal Code	20000	<input type="text"/>
Country	USA - United States	<input type="text"/>
Phone	301-555-1212	<input type="text"/>
Mailing Address		
Mailing Name	ICMR	<input type="text"/>
Street Address	123 Main Street	<input type="text"/>
City	Washington	<input type="text"/>
State	DC - District of Columbia	<input type="text"/>
Zip/Postal Code	20000	<input type="text"/>
Country	USA - United States	<input type="text"/>
Business Identifiers		
EIN	98-7654321	<input type="text"/>
DUNS	123456789	<input type="text"/>
DUNS Plus 4	<input type="text"/>	<input type="text"/>
CAGE / NCAGE	<input type="text"/>	<input type="text"/>
ASAP ID	<input type="text"/>	<input type="text"/>
Applicant Type	M = Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education) Enroll in ASAP >>	
*Justification for Changes		

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ASAP Enrollment Request

Organization: Chameleon Corporation (2002506)
 Request ID: 2245978
THIS REQUEST IS LOCKED

Information for the Point of Contact who will work with the Grants Making Agency to complete the ASAP Enrollment for this organization.

Organization Profile

EIN/TIN#:	25-1920531
DUNS:	6009013961234
Name:	Chameleon Corporation
Type:	R - Small Business
Address:	6400 Breakpoint Ave Las Vegas, NV 89130-1752

Point of Contact

Name:	Snow White
Title:	Admin Assistant
Email:	testemail@msg2.rdc.noaa.gov
Phone Number:	301-555-1212

Checklist Completion Dates (Use format MM/DD/YYYY for checklist dates)

Date	Checklist Item
05/31/2012	1. Received Grant recipient ASAP Point of Contact (POC) information (Set by system)
05/31/2012	2. Entered profile into ASAP (ASAP sends userid and password to POC)
06/01/2012 ASAP Id: 253647	3. Received email notification from ASAP that Enrollment process is complete (Attach email to checklist)
	4. Created New ASAP vendor in CBS (Set by system)

Attachments:

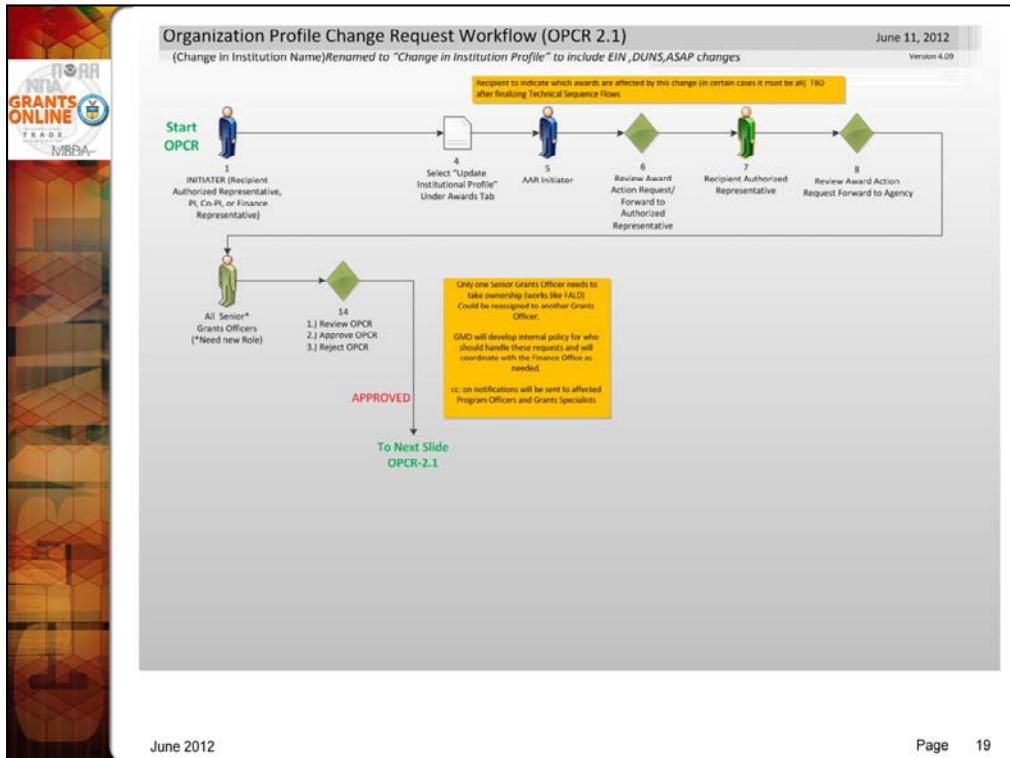
No attachments.

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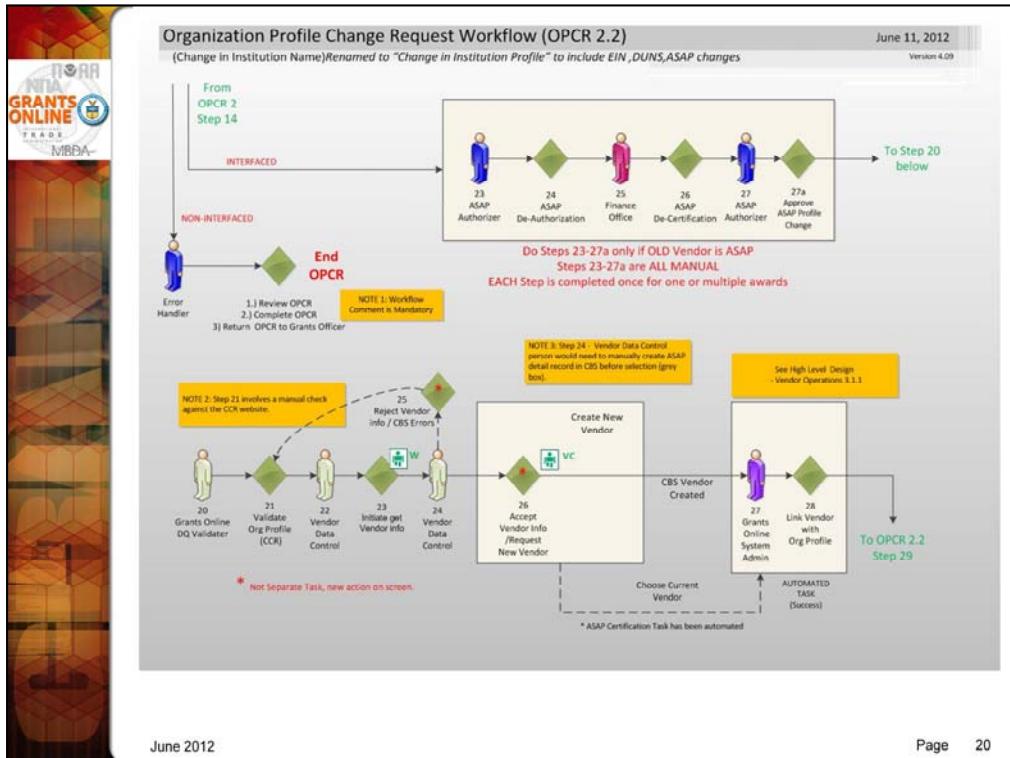
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The ASAP Enrollment Request will replace the current email that comes from the recipient to initiate the ASAP Enrollment. The ASAP Enrollment Power Point guidance document needs to be updated to reflect the new process.

The checklist only records 4 of the steps involved in the action enrollment process. This task may actually sit in the inbox of the ASAP Authorizer for a couple of weeks while each step of the checklist is being completed. The last step is filled in by the system when the workflow is completed.

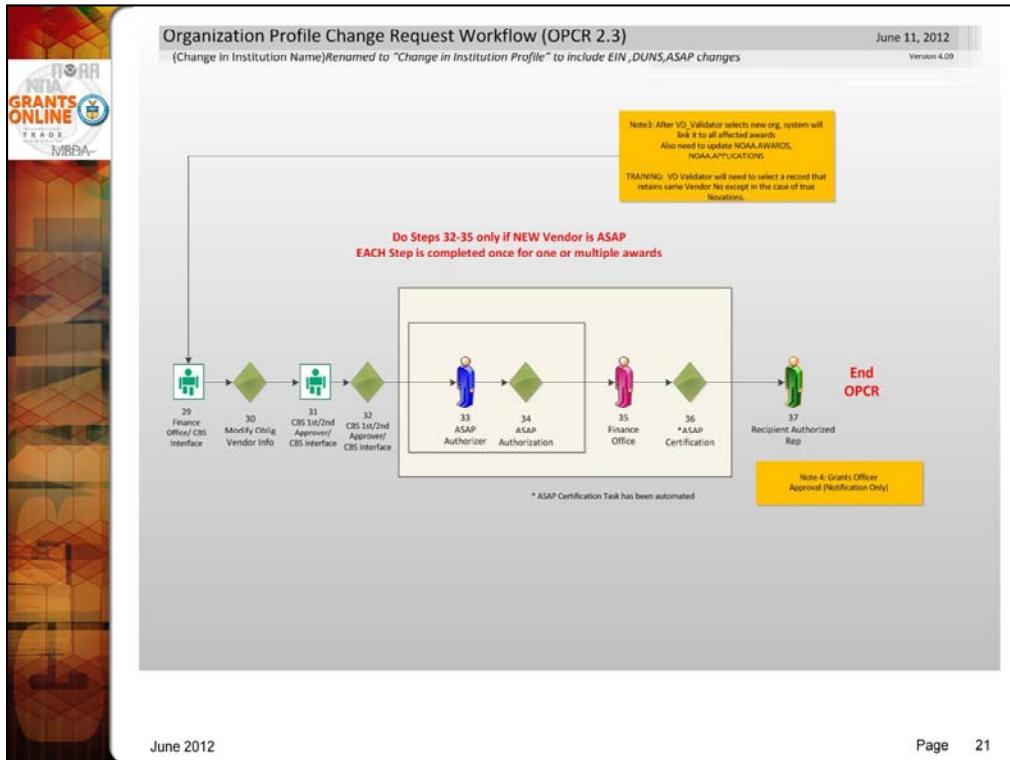


The ASAP Enrollment workflow starts with a new document in Grants Online called an Organization Profile Change Request. When the request is forwarded to the Agency it comes directly to the ASAP Authorizer.



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The Organization Profile Change Request workflow ends with ASAP Authorization of the Obligation-Modify transaction for the change in Vendor.

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Organization Profile Change Request
Organization: Textile/Clothing Tech Corp (2001959)
Request ID: 2252276
THIS REQUEST IS LOCKED

Profile Field	Current Value	Requested Change
Legal Name or DBA	Textile/Clothing Tech Corp	New Textile/Clothing Tech Corp
Business Identifiers		
EIN	36-3166123	12-3456768
DUNS	177959483	998765432
Justification for Changes		
Testing OPCR Workflow - Non Interfaced Award		
Spell Check		

Attachments:
No attachments.
Selected organization: National Textile Center (2001955)

This request impacts the following awards:
 IT12IAK1130002

[Cancel](#) [Print](#)

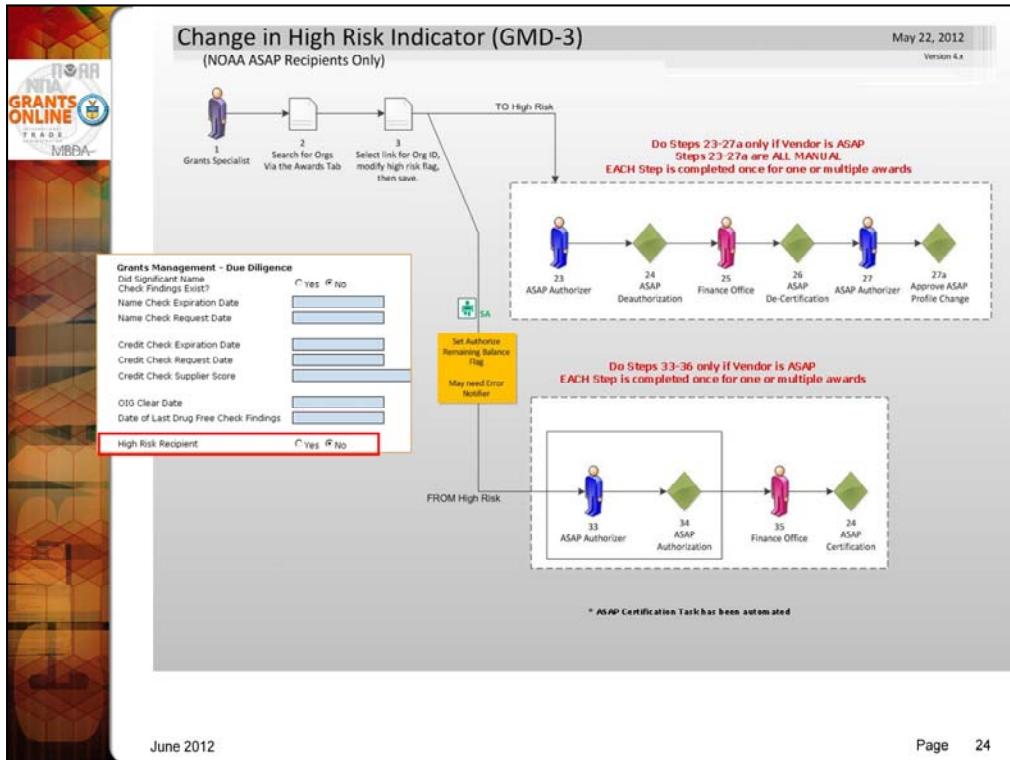
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Sample Organization Profile Change Request (OPCR) as it comes in from the Recipient.

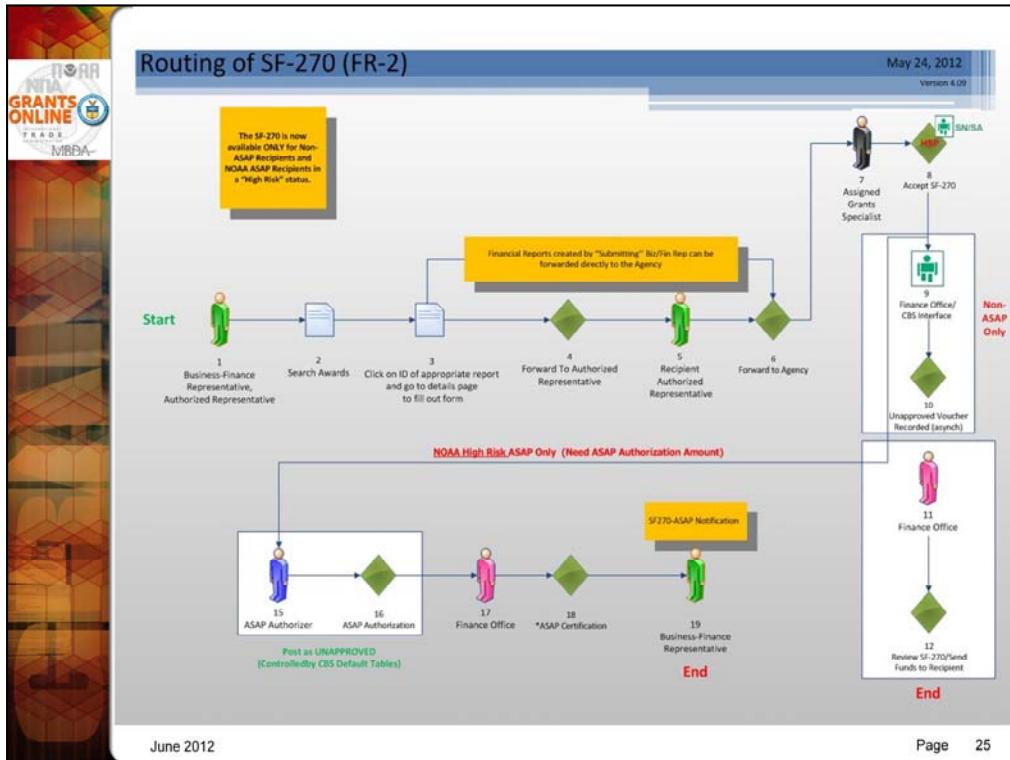
The screenshot shows the GSA Grants Online interface. At the top, there's a banner for 'TRADE SHOW GRANTS ONLINE' with logos for GSA, NITA, and MBDA. Below the banner is a search/filter section with 'Document Type' (All), 'Status' (Open), and a 'Apply Filter >>' button. A message indicates '211 items found, displaying all items: 1'. A table lists one item: 'ASAP Authorization for Vendor Change' with ID 2263061, status 'Not Started', and type 'Organization Profile Change Request'. The main content area shows a detailed view of the task 'ASAP Authorization for Vendor Change' with ID 2263061. It displays the 'Status' as 'In Progress: ASAPAuthorizerActions - Not Started'. Under 'Action:', a dropdown menu is open with options: 'Please select an action', 'Please select an action', and 'Authorization Of ASAP Funds Complete'. The 'Authorization Of ASAP Funds Complete' option is highlighted with a blue arrow pointing to it from a callout bubble. Other buttons visible include 'Submit', 'Save Comment', and 'Spell Check'. A yellow callout bubble at the bottom right states: 'Known issue: Wording on Action dropdown option needs to be modified.' At the bottom left is the date 'June 2012' and at the bottom right is 'Page 23'.

At the end of the workflow, the ASAP Authorizer will get a task to authorize the funds on the Obligation – Modify action for the new vendor after the CBS Approvals are done. The dropdown option still refers to “ASAP Funds” because it was copied from other workflows for funded actions. It will be fixed during Operations and Maintenance (O&M) as prioritized by the GMAC.



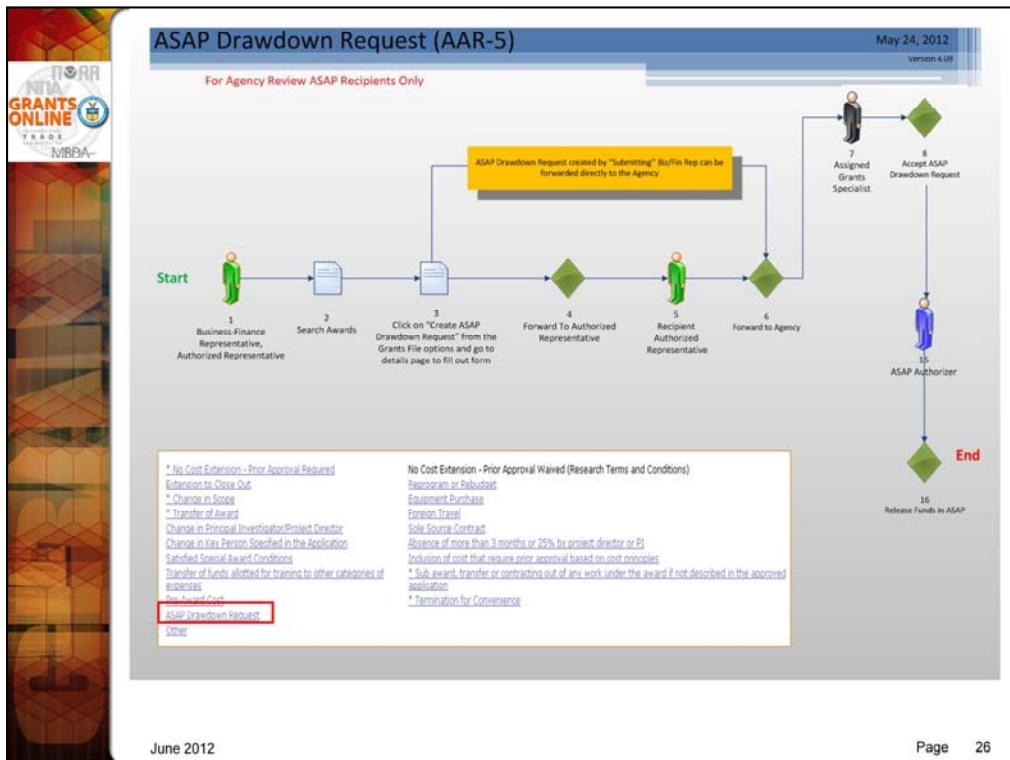
To change the High Risk indicator for an organization:

1. Search for an Award associated with the organization.
2. Click on the “Org_ID” link next to the Award Number in the Search Results.
3. Change the High Risk radio button as appropriate.
4. If the organization is ASAP the system will generate a task for the Authorized Representative to de-authorize or authorize the remaining funds based on the High Risk status. (No action is needed for a non-ASAP organization.)

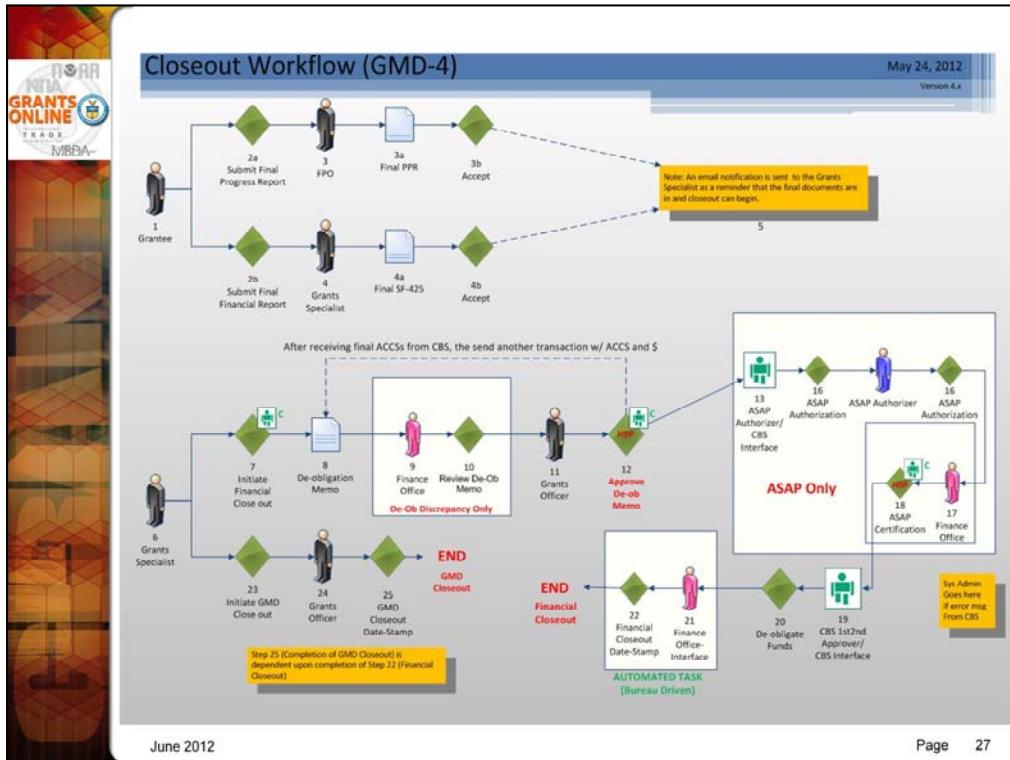


The option to submit a SF-270 is now only available to Non-ASAP recipients and to NOAA High Risk ASAP recipients. There is currently only one High Risk NOAA recipient so it will be rare for an SF-270 to be submitted for an ASAP award. However, when it does get submitted for an interfaced award, the system will create an unapproved profile to authorize only the requested amount as accepted by the Grant Recipient.

A new Award Action Request has been created for ASAP Recipients on the Agency Review process who wish to inform the agency that a drawdown request has been submitted in ASAP. (See ASAP Drawdown Request AAR.)



The ASAP Drawdown Request does not get routed to CBS Approvers since there are no obligation actions associated with this request. The request gets routed to the ASAP Authorizer after Grants Specialist Approval so the Agency Review can be released in ASAP.



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THIS DOCUMENT IS LOCKED

MEMORANDUM: NOAA Finance Office
FROM: Grants Management Division
SUBJECT: FINANCIAL CLOSEOUT
De-obligation Request for Award: NAI2NOS4820176

Total Federal Funding (entire award):	\$97.00
Recipient Name:	University of South Alabama
EIN:	630477348
DUNS:	172750234
ASAP ID (if applicable):	
Award Period:	03/20/2012 - 04/04/2012
Federal Program Officer:	Janet Reise
Obligation Number:	373920
Total De-obligation Amount from CBS:	\$97.00

Item #/MDL	ACCS	Amount to De-obligate
1 / 1	14 2012 2000 52-30-00-000 SAE0000-SAE 06-02-0004-01-00-00-00 41-10-22-00	\$97.00

The Grants Management Division has reviewed the subject award for final closeout. This document serves as authorization to proceed with the de-obligation process.

Justification for De-obligation:
The Grants Management Division received the Final SF-425 (attached) and authorizes the close-out process to proceed. De-obligations and closeout are authorized for the remaining balance identified on the final Federal Financial Report (SF-425) which reconciles with the Commerce Business System (CBS).

[Spell Check](#)

Financial Closeout Checklist:
The Grants Management Division recognizes there is a reconciliation issue with this grant in the CBS:

Grants Officer Approval: Alan Conway 04/05/2012
De-obligation Completed: Grants Online-CBS Interface
Finance Office Approval: William Koontz 04/05/2012

Attachments:
No attachments.

[Cancel](#) [Print Memo](#)

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Sample De-obligation Memo for Closeout.