



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

Grants Specialists and Grants Officers

May 2012



New and Updated Processes Related to the Grants Online-CBS Interface

DEMO – GMD Review and Approval Process

1. Current Year Funds (Using New Award)
 - a. Adding a new Organization
 - b. New PO Checklist Question
2. Prior Year Funds

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

Add New Organization

Add Organization

*****PROVISIONAL ORGANIZATION*****

Description

Organization Type * External Recipient

Bureau * -not specified-

Applicant Type -not specified-

Organization Name * International Trade Administration (ITA)

Identification

Duns Number (9 digit number)

EIN Number (10-8000000)

MSI Code -not specified-

CAGE CODE: []

CCR EXPIRATION DATE: []

Please press 'Save' before you add attachments

Save Save and Return to Main Cancel

Note: Addresses must match the physical and mailing addresses in the CCR for the associated FFATA DUNS. The Physical Address is the address used for searching and viewing throughout the system.

New PO Checklist Checklist

General Award Information

Application Organization: ICM State: DC

Applicant's EIN and DUNS numbers have been verified:

Grant Type * [Guidance](#)

Grant

Cooperative Agreement

If Cooperative Agreement, enter [Cooperative Agreement Special Award Condition](#)

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When adding a new organization the FPO must now select the correct Bureau at the top of the page. If the organization has a CAGE CODE it should be entered at the bottom of the page. The FPO can check to see if a Cage Code is required by doing a look up at the Central Contractor Registry site. There is a link on the “Add Organization” page to access that site. If multiple Cage Codes are found, the applicant needs to be contacted to obtain the correct one since it is not a data field on the SF-424. This should be done in conjunction with the verification of the EIN and DUNS numbers listed on the application which is a new checkbox on the PO Checklist.

On the PO Checklist a required checkbox has been added so the FPO can indicate if the EIN and DUNS number that the recipient entered on the submitted application has been verified. (There have sometimes been typos in the EIN or DUNS number on the application which have led to inaccuracies in the organization’s profile information as well as contributing to the grant being linked to an incorrect vendor in the CBS system.) The ideal time to check this information is during the “Conduct Negotiations” (Universal) or “Assign Award Number/Recipient” (Competitive) step, especially if a new organization is being used.

The image displays a screenshot of the NIFA Grants Online system interface. On the left, there is a vertical banner with the NIFA Grants Online logo and the MBDA logo. The main content area is divided into several sections:

- Workflow Diagram (Top):** A flowchart showing the process from a Procurement Request (30) to a Procurement Request (31), then to 'Complete and Forward Each Document' (32). From 32, the flow goes to a Requestor (33), then to 'Approve Proc. Req.' (34). From 34, it branches to 'Approve Procurement Request' (34A) and 'Approve Procurement Request' (34B). From 34A, it goes to a Request Authorizing Official (35), and from 34B, it goes to 'Approve' (36).
- Accounting - ACCS Lines (Middle):** A screen showing 'No CD435 ACCS Lines have been defined.' and 'Total Federal funds authorized for this Award action: \$5,000.00'. It includes a 'CBSValidate' button.
- Validation Form (Bottom):** A form with fields for 'Validated: false', 'Bureau (xx): 14', 'Fund (xx): 0', 'Fiscal Year (yyyy): 2012', 'Project Task', 'Program Code', 'Organization', 'Object Class', and 'Amount'. It also has a 'Prior Year Fund' dropdown menu and a 'DWValidate' button.

Yellow callout boxes provide additional information:

- 'Option to establish additional PRCF reviewers between the Requester and Authorizing Official' (pointing to the flow between 32 and 33).
- 'Optional Reviewer If additional reviewer(s) are selected' (pointing to the flow between 34A and 34B).
- 'The Fiscal Year can be changed by the FPO to use Prior Year Funds' (pointing to the Fiscal Year field).
- 'There is a new "Validate" button on the main Procurement Request screen to do an edit check against the main CBS database.' (pointing to the CBSValidate button).
- 'The original "Validate" button has been renamed to DW Validate to indicate that the validation on this screen is done against the Data Warehouse.' (pointing to the DWValidate button).
- 'There is a new indicator on the screen for Prior Year Funds. It is automatically set by the system based on the Fiscal Year on the ACCS line.' (pointing to the Prior Year Fund dropdown).

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For the Program Office there is a new “CBSValidate” button on the main Procurement Request screen. After entering the ACCS line(s), this button can be used to do a funds check for sufficient funds. It will also check the validity of each component of the ACCS line as well as check to see if the organization has been linked to a valid Vendor in CBS. The CBS validation status will appear at the top of the Procurement Request screen. If there is an edit check that does not pass, a CBS Error screen will be displayed explaining the cause of the validation failure.

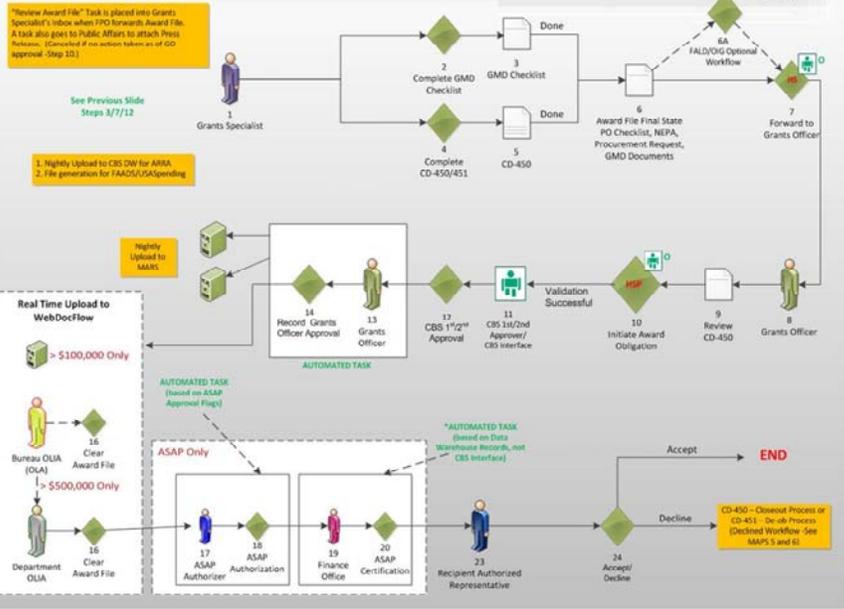
There are three new features on the ACCS Line data entry screen for the Procurement Request.

1. The “Fiscal Year” field is now a data entry field. It will default to the current fiscal year but can be changed by any user with edit rights on this screen.
2. The “Prior Year Fund” indicator is automatically set by the system based on the data in the “Fiscal Year” field.
3. The “Validate” button has been renamed to “DWValidate” to distinguish it from the new “CBSValidate” button on the main Procurement Request screen. The “DWValidate” button uses the data entered into the “Project” and “Task” fields to retrieve the correct “Program Code” to fill in the full ACCS line.



GMD Review, Obligation, Approval and Award Offer (GMD-1)

May 22, 2012
Version 4.x





GMD Checklist - NA12GOT9990024

Attachments:
No attachments.
Add new Attachment: [s]
Any changes to information on this page should be saved before adding or removing attachments.
[Learn More Guidance](#)

 (No Comments) - Comments

Checklist Items	
Not Required	<input type="checkbox"/> Budget/Cost Analysis Memo
As Needed	<input type="checkbox"/> Intergovernmental Review of Federal Program
Applicants Management and Financial Capabilities	
As Needed	<input type="checkbox"/> Credit Check
Required	<input type="checkbox"/> Subsequent Federal Debt
Required	<input type="checkbox"/> List of Parties, excluded from Procurement/Non-Procurement Activities
Required	<input type="checkbox"/> Past Performance
Not Required	<input type="checkbox"/> Pre-Award Accounting System Survey
As Needed	<input type="checkbox"/> High Risk Recipient
Not Required	<input type="checkbox"/> Awards to Insular Area <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Not Answered
Required	<input type="checkbox"/> Grant Type: <input type="checkbox"/> Cooperative Agreement <input checked="" type="checkbox"/> Grant
Required	<input type="checkbox"/> Confirm Financial and Progress
Required	<input type="checkbox"/> Review Special Award Coordination
Required	<input type="checkbox"/> Project Details
Required	<input type="checkbox"/> Statutory Authority
Required	<input type="checkbox"/> Project Dates

[View/Manage Recipient Organization](#)

Save | **Save and Return to Main** | **Cancel**

Environmental Action Committee of West Marin

 (No Comments) Internal Comments
Note: These comments are for internal use only.

Audit Trail: 

Description
Grants Online Bureau: **1000002 - National Oceanic and Atmospheric Administration (NOAA)**
Grants Online Org ID: **2001905**
Organization Type: External Recipient
Applicant Type: Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)

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For awards to new organizations, the Grants Specialist is encouraged to click on the View/Manage Recipient Organization link to confirm that the correct Bureau has been associated with the organization record linked to the award.

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Department of Commerce Pre-Award Notification Requirements for Grants (73 FR 7696 (February 11, 2008)).
 American Recovery and Reinvestment Act of 2009 - DoC Standard Terms and Conditions
 Other(s)

Spell Check

Attachments:
 No attachments.
 Add new Attachment: [+]
 Any changes to information on this page should be saved before adding or removing attachments. [Large File Guidance](#)

Grants Officer:
 Recipient Authorized Representative:
 Last CBS Validation: Status:

This award approved by the Agency Grants Officer constitutes an obligation of the Recipient. The Recipient agrees to comply with the Amendment provisions checked on this document, as well as provisions incorporated in the Standard Award Conditions. If not electronically accepted by receipt, the Grants Officer may unilaterally terminate this Award.

[CD-450 Report](#) [Award Finance Report](#)
[Save](#) [Save and Return to Main](#) [CBSValidate](#) [Cancel](#)

Amendment: [Enter Reasons](#)
 This amendment approved by the Agency Grants Officer constitutes an obligation of the Recipient. The Recipient agrees to comply with the Amendment provisions checked on this document, as well as provisions incorporated in the Standard Award Conditions. If not electronically accepted by receipt, the Grants Officer may unilaterally terminate this Award.

[CD451 Report](#) [Award Finance Report](#)
 Note: No Special Award Conditions are associated with this amendment.
[Save](#) [Save and Return to Main](#) [CBSValidate](#) [Cancel](#)

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Grants Specialists and Grants Officers can perform the same CBS Validations as Federal Program Officers except they will use the “CBS Validate” buttons found at the bottom of the CD-450 and Amendment screens.



This Sample Error Message contains a several informative statements, with only one being an actual error:

Line 1 states that the Vendor Validation passed.

Lines 2 and 3 indicate there was a problem with the Task Code on the ACCS line.

Lines 4 and 5 indicate that the system correctly detected that Prior Year funds were being used.



Prior Year Funding – Grants Officer

CBS Result

Warning - Prior Year Funds will be used for the AccsString 14 HBR1RP4-P01 1001 03-01-06-013 50-44-0003-00-00-00-00 41-11-00-00 000000;

Warning - Insufficient Funds for the AccsString 14 HBR1RP4-P01 1001 03-01-06-013 50-44-0003-00-00-00-00 41-11-00-00 000000 provided; FundsRequested 16; FundsAvailable -92297.7; Discrepancy -92303.7;

Error - FundsOverrideFlag has to be Y in order to process prior year document posting;

Financial Assistance Award			
Recipient Name:	HIGH RESOLUTION SYSTEMS	Federal Share of Cost:	\$350.00 <input type="checkbox"/> Override <input type="checkbox"/>
Street Address:	4120 SHERWOOD DR	Recipient Share of Cost:	\$0.00
City, State, Zip:	CRYSTAL LAKE, IL 60012-3030	Project Title:	Prior Year Demo - New Awd
CFDA Number:	11.999	Award Number:	NA12GOT9990031
		Total Estimated Cost:	\$350.00
		Award Period:	05/01/2012 - 04/30/2013
Internal Use Only			
ASAP Authorize Amount:	\$350.00	Prior Year Fund:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Manual Override:

Costs Are Revised As Follows:

	Previous Estimated Cost	Add	Deduct	Total Estimated Cost
Federal Share of Cost	\$2600.00	\$16.00	\$0.00	\$2616.00
Recipient Share of Cost	\$0.00	\$0.00	\$0.00	\$0.00
Total Estimated Cost	\$2600.00	\$16.00	\$0.00	\$2616.00

Internal Use Only			
ASAP Authorize Amount:	\$0.0	Prior Year Funds:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

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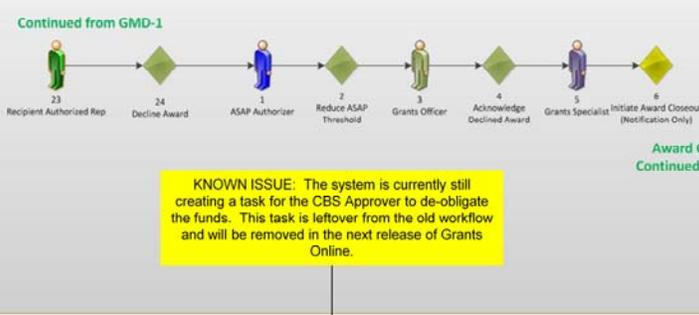
When Prior Year funding is being used, the Grants Officer will need to coordinate their award approval with Maria King in the Finance Office. Maria will need documentation from the Line Office stating that the appropriate clearances have been obtained before she allows a grant action using Prior Year funds to get approved in CBS. Additionally, the CBS system is only put into “Override Mode” on Wednesdays between 3-4pm. When CBS is in “Override Mode” other non-prior year awards will not be able to be signed by the Grants Officer because CBS will produce an error message. GMD and the Finance Office had some preliminary discussions during the last working group meeting regarding establishing a standard operating procedure; however, it has not yet been finalized.

Declined Award Workflow (DA-1) May 22, 2012
Version 4.x

CD-450



Continued from GMD-1



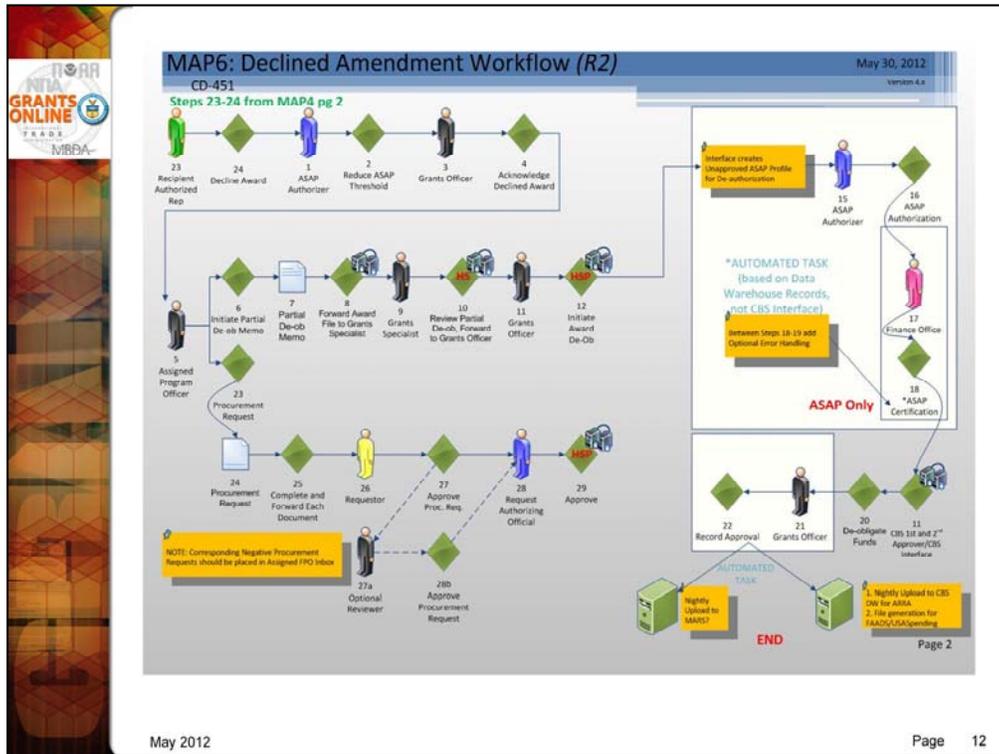
Award Closeout
Continued on GMD-4

KNOWN ISSUE: The system is currently still creating a task for the CBS Approver to de-obligate the funds. This task is leftover from the old workflow and will be removed in the next release of Grants Online.

Workflow History								
Name	Date Assigned	Date Started	Date Completed	Performer	Role	Action Taken	Current Status	User Comments
Remove Award Information from CAMS	05/21/2012 11:34:22 AM	05/21/2012 11:34:23 AM	05/21/2012 11:34:23 AM	Sean Gibson	CAMSFirstApprover	AwardWithdrawnfromCAMS	Complete	
Acknowledge Award Declined	05/21/2012 10:58:59 AM	05/21/2012 11:34:22 AM	05/21/2012 11:34:22 AM	Alan Cornwell	Grants Officer	AcknowledgeAwardDeclined	Complete	
Accept/Decline Award	05/21/2012 10:46:10 AM	05/21/2012 10:58:58 AM	05/21/2012 10:58:58 AM	John Who	RecipientAuthorizedRepresentative	DeclineAward	Complete	Test

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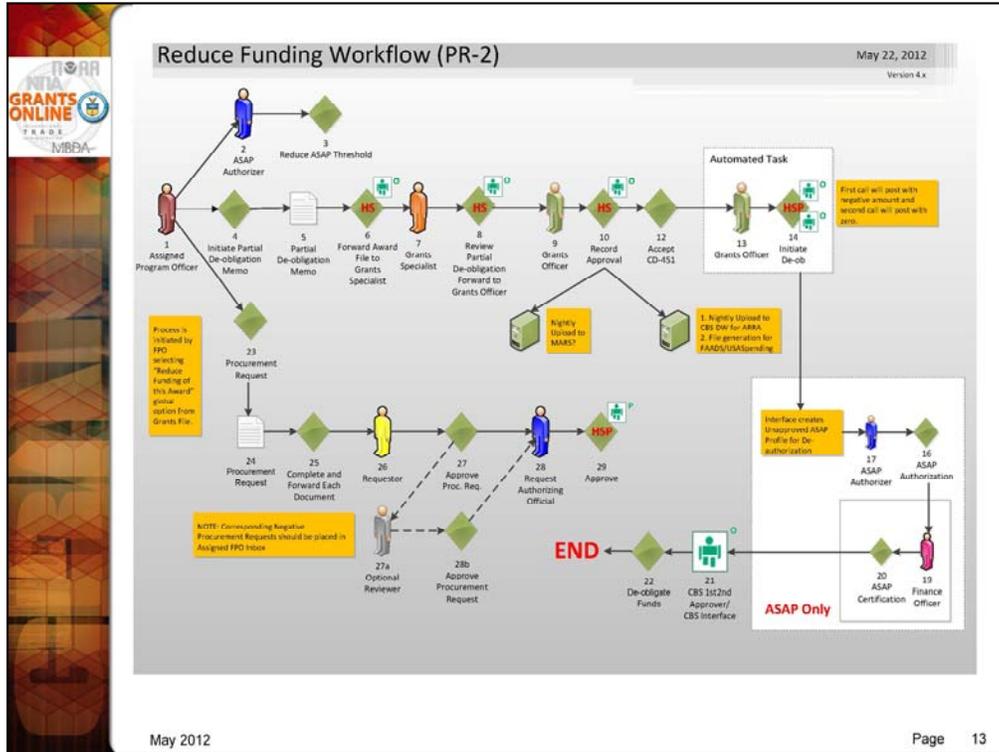
If an award is declined by the recipient, the extraneous CBS Approver task will be automatically closed for interfaced awards. For non-interfaced awards the task should be manually closed by the CBS Approver and then the Help Desk should be notified in order to remove the Closeout date from the Award 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 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”.



A Reduction in Funding Action is initiated from the Grants File page similar to a Partial Funding action.

The Reduction in Funding memo screen is also similar to a Partial Funding action.

Grants File - NA12GOT9990023

Id: 2245484
Status: Accepted

Action:

Your Comment:

Reduce Funding -- NA12GOT9990023

Memo *

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

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Approved Plan and Prior Obligations

Action	Application ID	Project Title
Select	2245483	For Reduction in Funding Screen Shots

Planned Year	Approved Fed Share	Obligated	Approved Non-Fed Share	Assigned Non-Fed Share
2012	\$10,000.00	\$10,000.00	\$0.00	\$0.00

Selected Application

Application ID	Approved Fed Share	Remaining Fed Share	Pending Fed Share	Fed Deduct Amount	Approved Non-Fed Share	Remaining Non-Fed Share	Pending Non-Fed Share	Non-Fed Amount	AMD No.	Project Title
2245483	\$10,000.00	\$0.00	\$0.00	100.00	\$0.00	\$0.00	\$0.00	0	0	For Reduction in Funding Screen Shots

NFA GRANTS ONLINE
TRADE
MBDA

View	Award Number	Task Received Date	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date	Approved Federal Funding	Total Federal Funding	Applicant Name
View	NA12GOT9990023	05/22/2012	2534353	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2245494		N/A	\$10,000.00	Environmental Action Committee of West Marin
View	NA12GOT9990023	05/22/2012	2534352	Reduce Funding Amendment	Not Started	Award File	2245493		N/A	\$10,000.00	Environmental Action Committee of West Marin

For a Reduction in Funding, two tasks are generated in the FPO Inbox similar to a Partial Funding action.

The Reduction in Funding Procurement Request should be for a negative dollar amount.

Last CBS Validation: Status:

Active Procurement Requests:
Nothing found to display.

Withdrawn Procurement Requests:
Nothing found to display.

Federal Share: * \$ -100.00

Accounting - ACS Lines *
One item found: 1

Bureau/Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWV	Validated	Action
14	2000	2012	10-01-0002-00-00-00-00	52-90-00-000	SAE0000-SAE	41-12-00-00 (\$100.00)	N	Yes		Edit Delete

Add New ACS Line
PRCF Total for this Award action: \$-100.00
Total Federal funds authorized for this Award action: \$-100.00

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Just like with a Partial Funding, two tasks are generated in the FPO inbox.

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: Grants Student00
Obligation Number: 374002
Requested De-obligation Amount: \$100.00

Item #/MDL	ACCS	Amount
2245494 / 2025338 14 2012 2000 52-30-00-000 SAE0000-SAE	10-01-0002-00-00-00-00 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.

Grants Officer Approval:
De-obligation Completed: Grants Online-CBS Interface
Finance Office Approval: N/A

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.

Correct ACCS Lines on Approved Award (PR-3)
(No Net Dollar Change)

May 22, 2012
Version 4.x

Procurement Request and Commitment of Funds - NA12GOT9990014

THIS DOCUMENT IS LOCKED

THIS REQUEST IS APPROVED
Correct ACCS Lines

Accounting - ACCS Lines *
2 items found, displaying all items. 1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DW	Validated
14	1	2012	06 -02 -0004-01-00-00-00	01-01-02-000	14K:3BN8-P00	41-11-00-00	\$10,000.00	N		Yes
14	2000	2012	10 -01 -0002-00-00-00-00	52-30-00-000	SAE0000-SAE	41-12-00-00	(\$10,000.00)	N		Yes

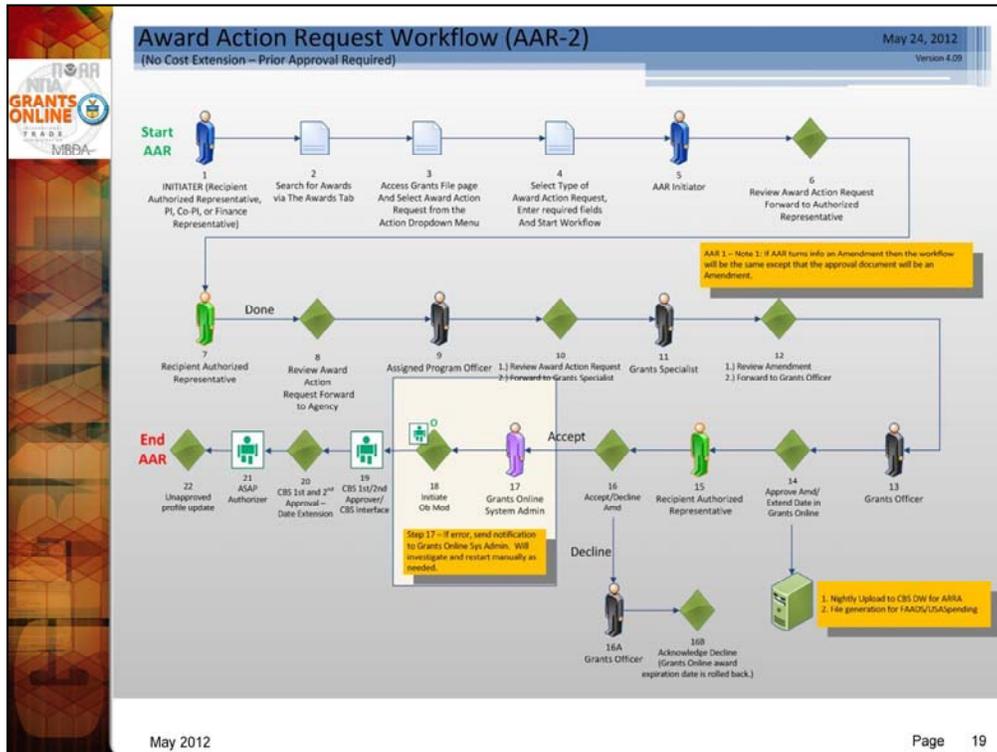
Add New ACCS Lines
PRCF Total for this Award action: \$10,000.00
Total Federal funds authorized for this Award action: \$10,000.00

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To make a correction to the ACCS line on an already approved award:

1. Navigate to the details page of the Procurement Request that needs to be corrected.
2. Click on the “Correct ACCS” button. This will generate a new “zero-dollar” Procurement Request.
3. Edit the ACCS line to make the amount (or portion of the amount) negative.
4. Add one or more positive ACCS lines to make a net balance of zero on the Procurement Request.
5. Start the workflow for approval of the Procurement Request.



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.



NOAA GRANTS ONLINE

[Inbox](#) [Awards](#) [Account Management](#) [Help](#)

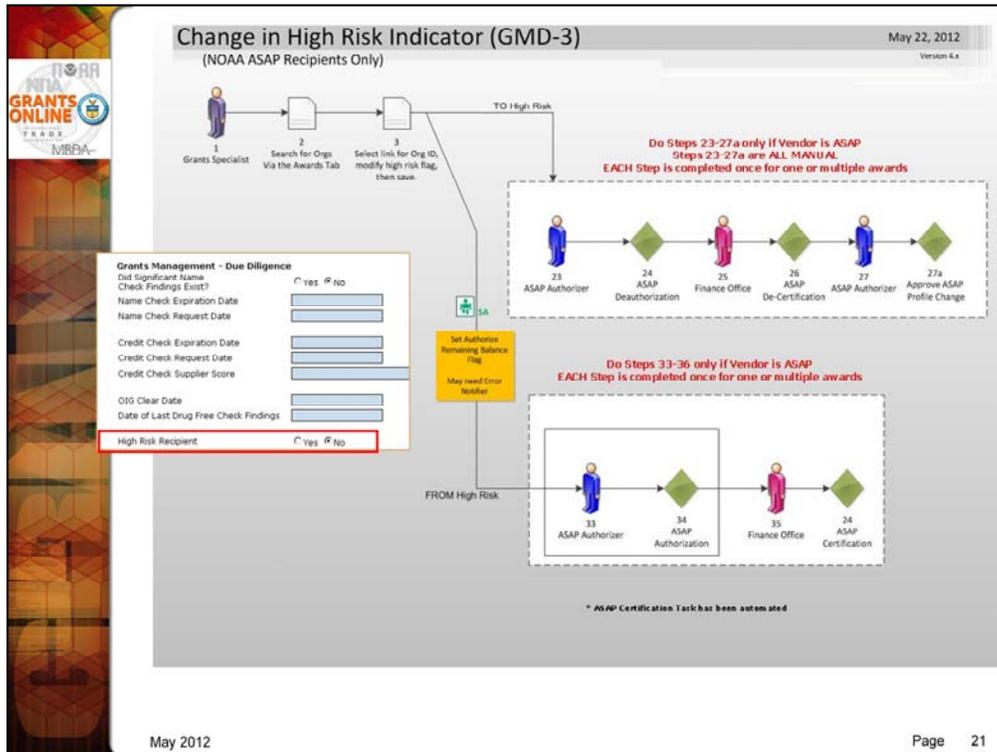
- Manage Recipient Users
- Organization Profile Change Request**
- SF-425A for Multiple Awards
- Search Awards
- Search Reports

Organization Profile Change Request

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

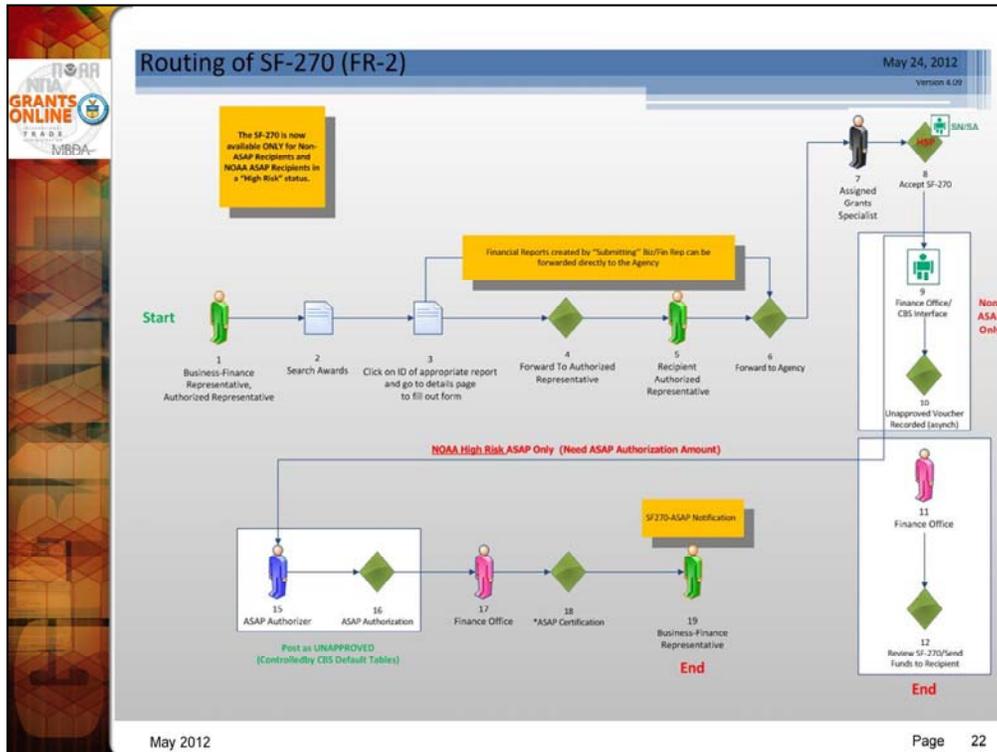
Profile Field	Current Value	Requested Change
Legal Name or DBA	Institute for Community Managed Resources (ICMR)	<input type="text"/>
Physical Address		
Street Address	123 Main Street	<input type="text"/>
City	Washington	<input type="text"/>
State	DC - District of Columbia	<input type="text"/>
Zip/Postal 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 Plus4		<input type="text"/>
CAGE / NCAGE		<input type="text"/>
ASAP ID		<input type="text"/>
Applicant Type	M - Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)	<input type="text"/>
*Justification for Changes		

[Email in ASAP >>](#)



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. 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.)

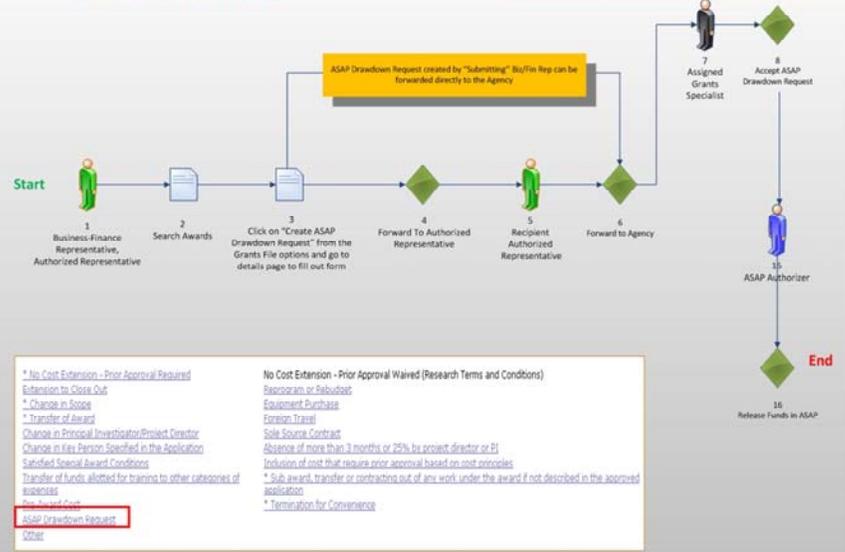


ASAP Drawdown Request (AAR-5)

May 24, 2012

Version 4.08

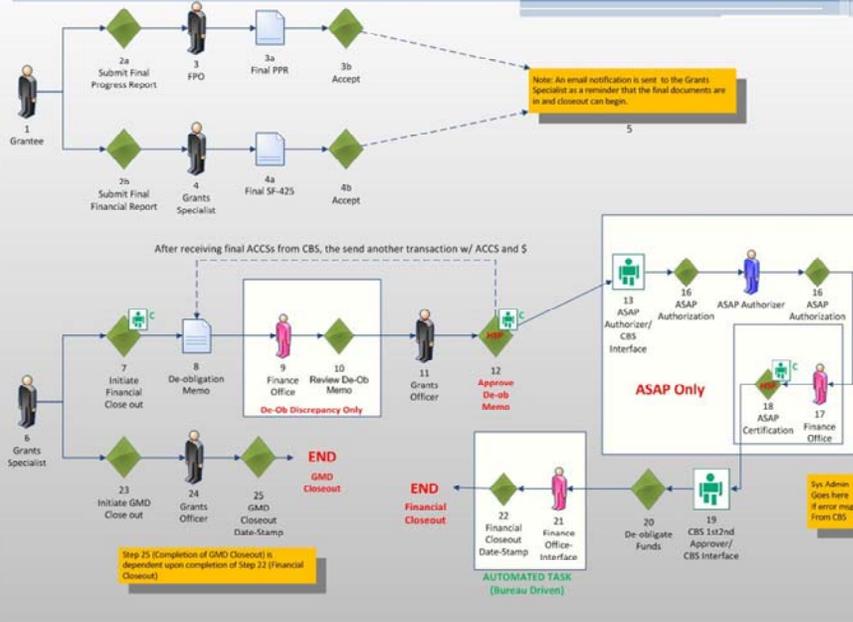
For Agency Review ASAP Recipients Only





Closeout Workflow (GMD-4)

May 24, 2012
Version 4.x





THIS DOCUMENT IS LOCKED

MEMORANDUM: NOAA Finance Office
 FROM: Grants Management Division
 SUBJECT: FINANCIAL CLOSEOUT
 De-obligation Request for Award: NA12NOS4820176

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 Officers: Janet Reize
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](#)

Sample De-obligation Memo for Closeout.