



Grants Online Training New Federal Program Officers

November 5-7, 2012

Federal Program Officer Training Agenda

Day 1 - AM

Session 1: Grants Online Overview and System Navigation 8:00 am – 10:15 am	
Topic	Duration
Introduction and Agenda	8:00 – 8:15 (15 min)
Grants Online Overview and Logging In	8:15 – 8:45 (30 min)
Basic System Navigation; Workflow and Account Management	8:45 – 9:35 (50 min)
Viewing RFAs and Awards	9:35 – 10:05 (30 min)
Additional Resources and Training Questions and Comments Evaluations	10:05 – 10:15 (10 min)

Objectives – By the end of this class students should:

- Have a basic understanding of the roles of Grants Online and the Grants Online PMO within the DOC Grants community
- Have a basic understanding of the structure of the Grants Online system
- Be able to find basic application and award information in Grants Online
- Know where to find additional help when needed

Training Materials:

1. Agenda and Objectives
2. Acronym List
3. Grants Online Overview Presentation
4. Grants Online User Roles Spreadsheet
5. Grants Online User Roles Definition
6. System Navigation Manual
7. Course Evaluation

DOC Grants and Grants Online Acronyms

AAR	Award Action Request
AGO	Acquisition & Grants Management Office, NOAA
AO	Authorizing Official on Procurement Requests (see also "BO")
AR or AOR	(Recipient) Authorized Representative
ASAP	Automated Standard Application for Payment (Department of the Treasury)
BAA	Broad Agency Announcement
BO	Budget Official (In Grants Online this is actually the Procurement Request Authorizing Official)
CAMS	Commerce Administrative Management System (now know as CBS)
CBS	Commerce Business Systems (formally CAMS)
CD	Congressional District
CD-	Commerce Department (when used in a form number such as CD-435, CD-450, CD-451)
CFDA	Catalog of Federal Domestic Assistance
CFR	Code of Federal Regulations
CM	Competition Manager
Co-PI	(Recipient) Principle Investigator - Secondary
DOC	Department of Commerce
DOC-OS	Office of the Secretary, DOC
FALD	Federal Assistance Law Division of DOC
FCS	U.S. and Foreign Commercial Service, ITA
FFO	Federal Funding Opportunity
FFR	Federal Financial Report
FIPS	Federal Information Processing Standards
FON	Funding Opportunity Number
FPO	Federal Program Officer
FRN	Federal Register Notice
GMAC	Grants Management Advisory Committee (NOAA)
GMD	Grants Management Division (Silver Spring and HCHB), DOC/NOAA
GNS	Grants Notification System (used by OLIA)
GO	Grants Officer
GS	Grants Specialist
IA	Import Administration, ITA
ITA	International Trade Administration
LO	Line Office

DOC Grants and Grants Online Acronyms

MBDA	Minority Business Development Agency
NCE	No Cost Extension
NEPA	National Environmental Policy Act
NESDIS	National Environmental Satellite, Data, and Information Service (NOAA Satellite Service)
NFA or OFA	NOAA Finance and Administration
NMFS	National Marine Fisheries Service (NOAA Fisheries Service)
NOAA	National Oceanic and Atmospheric Administration
NOFA	Notice of Funds Availability (See FFO, FRN, RFA)
NOS	National Ocean Service (NOAA's Ocean Service)
NTIA	National Telecommunications and Information Administration
NWS	National Weather Service, NOAA
OAR	Ocean and Atmospheric Research (NOAA Research)
OGC	Office of General Counsel, DOC
OHRM	Office of Human Resource Management, DOC-OS
OIG	Office of Inspector General, DOC
OLIA	Office of Legislative and Intergovernmental Affairs, (Bureaus and DOC)
OMB	Office of Management and Budget (part of the Executive Office of the President)
OS	Office of the Secretary, DOC
OTIA	Office of Telecommunications and Information Applications, NTIA
PD	(Recipient) Project Director
PI	(Recipient) Principle Investigator
PMO	Grants Online Program Management Office
PO	Program Office (sub organization under a Line Office)
PPR	Performance Progress Report
PRCF	Procurement Request and Commitment of Funds (CD-435) / Funding Memo
RFA	Request for Application
SAC	Special Award Conditions
SEC	Office of the Under Secretary for Oceans and Atmosphere (USEC abbreviated to SEC for use in FON)
SF-	Standard Form issued by the Office Management and Budget (as in SF-424, SF-269, SF-270, etc.)
SO	Selecting Official
USEC	Office of the Under Secretary for Oceans and Atmosphere (NOAA Upper Management)



Grants Online Overview

June 2012



Project Goals

- Single Unified Grant Processing and Administration, using an electronic solution, that will reduce processing time.
- A scalable solution for high volume usage and robust, available operation.
- An interface with the *Grants.gov* initiative to provide “one-stop” shopping for Federal grants-related activities
- Standardized business processes that will contribute to a more efficient and effective use of resources.
- A direct interface to other systems such as CBS/ASAP, FinLitLog, and WebDocFlow

Contract Award – August 29, 2003

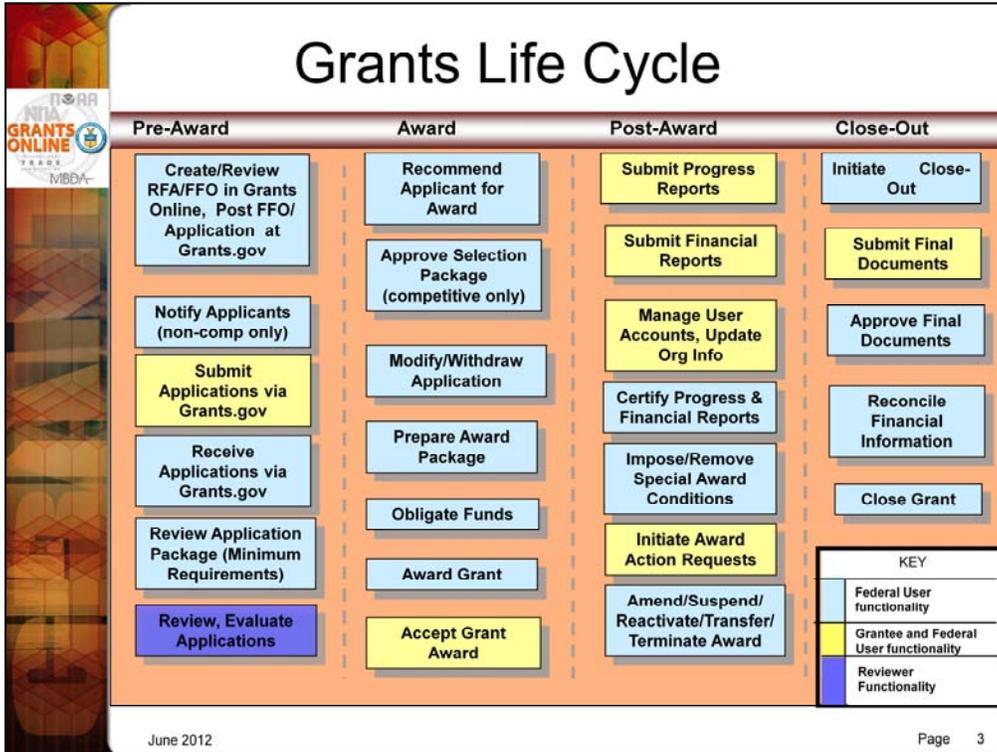
GO LIVE! (NOAA Feds Only) – January 10, 2005

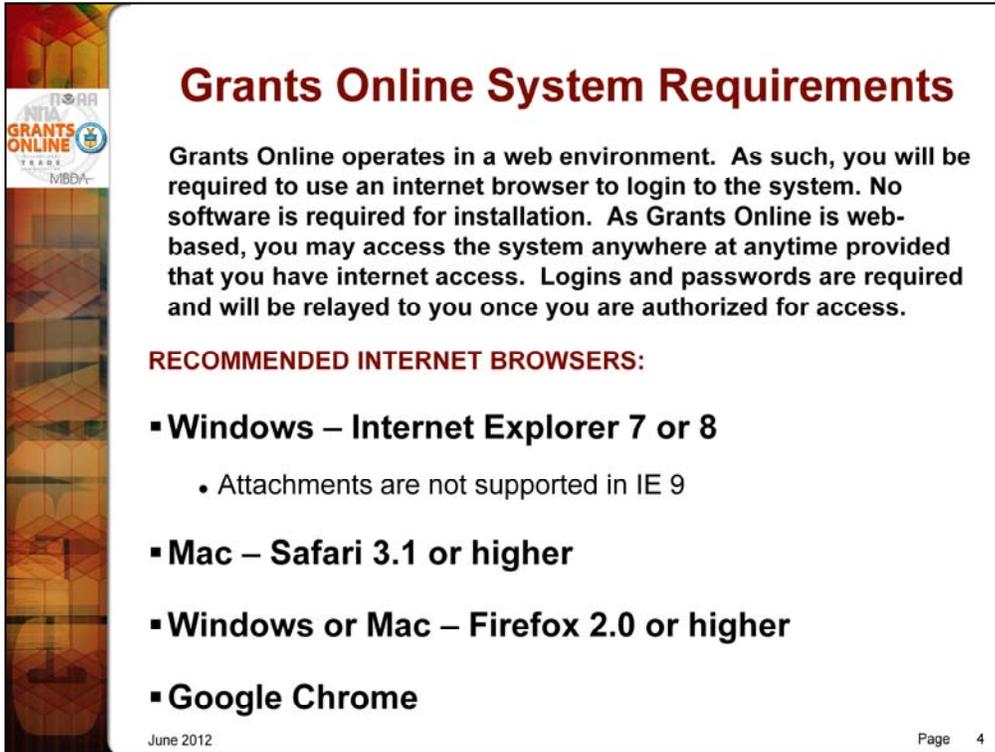
Rollout to Grantees – October through August FY 2006

Rollout to DOC – March 2009

Review Module – October 2011

CBS Interface – June 2012





The slide features a vertical decorative bar on the left side with a colorful geometric pattern. At the top of this bar is the logo for 'Grants Online' which includes the text 'NIRA', 'NFA', 'GRANTS ONLINE', 'TRADE', and 'MIDA'.

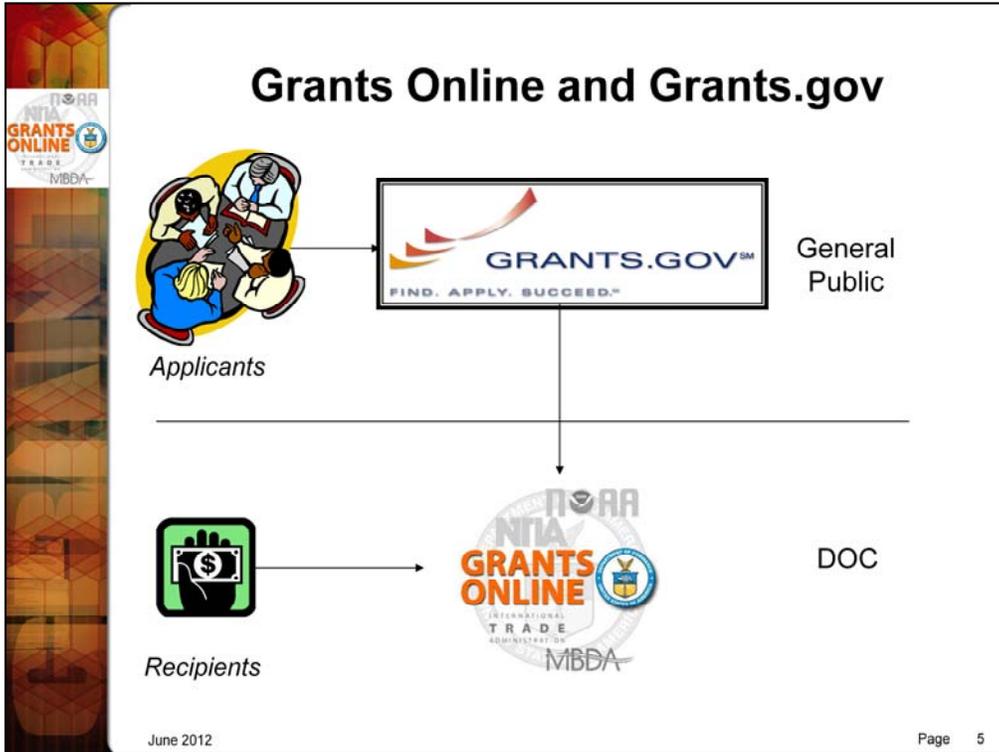
Grants Online System Requirements

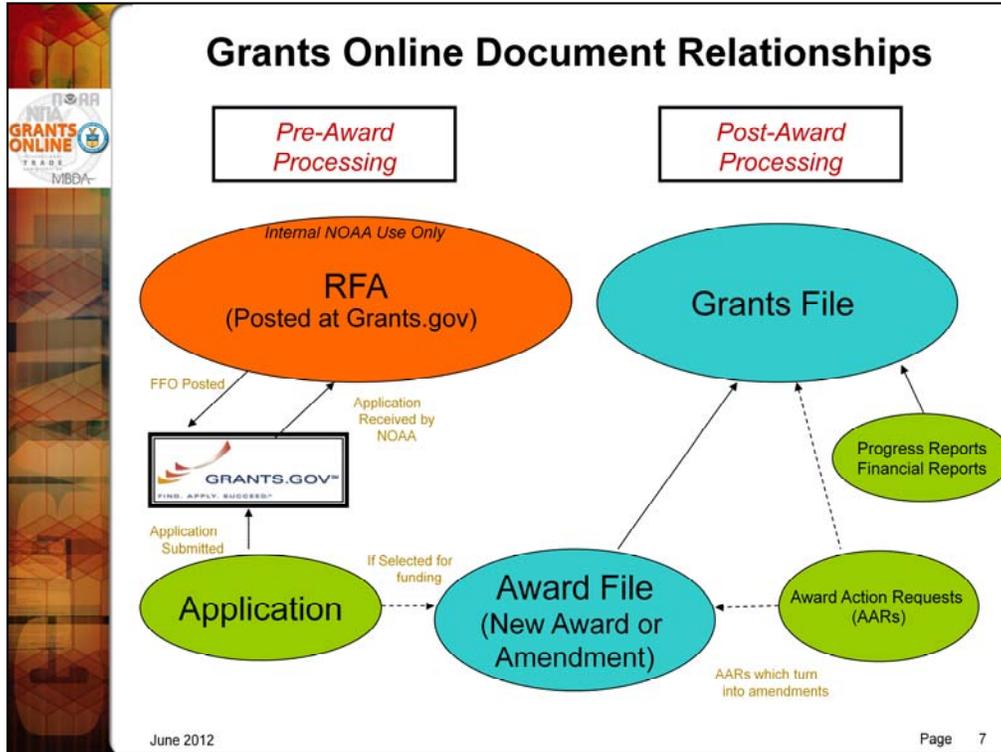
Grants Online operates in a web environment. As such, you will be required to use an internet browser to login to the system. No software is required for installation. As Grants Online is web-based, you may access the system anywhere at anytime provided that you have internet access. Logins and passwords are required and will be relayed to you once you are authorized for access.

RECOMMENDED INTERNET BROWSERS:

- **Windows – Internet Explorer 7 or 8**
 - Attachments are not supported in IE 9
- **Mac – Safari 3.1 or higher**
- **Windows or Mac – Firefox 2.0 or higher**
- **Google Chrome**

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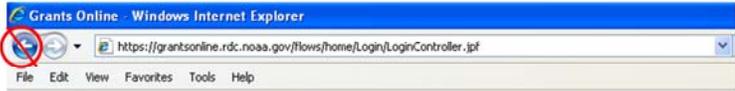


GREEN: Documents initiated by recipients.



Grants Online Helpful Hints

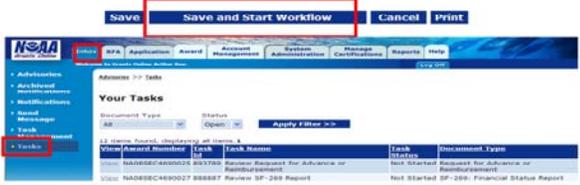
- **Do NOT** use the Browser “Back” button



- On Home Page, click on “Forgot your username?” to get Help Desk phone number.



- After clicking “Save and Start Workflow” always go to your Inbox Tasks for your next action. (If you do not see the new task, click “Tasks” in the left navigation pane to refresh the page.) **Always check Tasks before logout.**



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Buttons vs. Column Headings

Dark blue buttons with white lettering indicate an action to be taken.

Dark blue column headings look like buttons except that there are one or more additional lines of information beneath them. The first line will be displayed with a medium blue background and the next line will have a pale blue background.

Underlined column headings indicate that the data underneath can be sorted by that column.

Competitions
Press Save before selecting the following link(s)

Competition Name	Actions
Copy of Training Competitive RFA Dec 2008 Screen Shots	Add Delete
Add Item	

Attachments:

[Save](#) [Create Publication\(s\)](#) [Save & Continue](#) [Cancel](#)

Document Type: Status: [Apply Filter >>](#)

9 items found, displaying all items. 1

View	Task Id	Task Name	Task Status	Document Type
View	1365154	Certify/Revise Award File	Not Started	Award File
View	1365050	Review Reviewer Instructions	Not Started	Review Instructions
View	1365026	Certify/Revise Award File	Not Started	Award File



Large File Guidance

As a security measure, a 5 minute time limit is placed on uploading and downloading files. If you upload a file and it takes approximately 5 minutes, the upload may appear to have correctly completed when it did not. Please test the validity of the file by downloading it and attempting to open the file. If it does not open, the file is corrupted because it did not complete the upload.

Possible Attachment Upload Remedies

- If you have a corrupted upload, check the size of the corresponding download and compare to the size of the original file.
- If most of the file uploaded before failing, wait to upload the file when there is less internet traffic.
- Connect to a faster internet connection to perform the upload.
- Reduce the file size:
 - Split the file into multiple parts and upload as Filename - Part 1, Filename - Part 2, etc.
 - Zip the file.
 - If the file is a PDF and you have Adobe Acrobat Professional or equivalent software, open the file, click on the Document-> Reduce File Size... dropdown menu.
- Last resort for recipients uploading Progress Reports:
Contact your Program Officer for acceptable options to uploading the file. One approach may be to burn the document to a CD and mail to your Program Officer.
- Last resort for Federal personnel:
Contact the Help Desk to determine what additional remedies might be available.

Possible Attachment Download Remedies

- File download issues should be much less of a problem because download speeds are always an order of magnitude faster than upload speeds.
- Wait to download the file when there is less internet traffic.
- Connect to a faster internet connection to perform the download.
- Last resort:
Contact the Help Desk to determine what additional remedies might be available.

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Federal Grants Personnel

- **Program Office (Federal Program Officers)**
 - Provides the funding for the grant award
 - Federal Subject Matter Experts
 - Provides oversight on the programmatic aspects of the project – *receives and accepts the Project Progress Reports*
- **Grants Office (Grants Management Specialists and Grants Officers)**
 - Provides the final approval on all grant management matters
 - Federal Grants Management Experts
 - Provides oversight on the financial aspects of the project – *receives and accepts the Financial Reports (SF-425, SF-270)*

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Grants Management Advisory Council (GMAC) Contacts

NOAA/NESDIS	Ingrid Guch / Heather Hay	301-763-8282
NOAA/NMFS	Dan Namur /Melanie Gange	301-713-1364 x118 / 301-713-0174 x210
NOAA/NOS	Jane Piercy	301-713-3050 x 161
NOAA/NWS	Carla Kirby	301-713-0420 x 113
NOAA/OAR	Sharon Schroeder/Brenda Alford	301-734-1172 / 301-734-1174
NOAA/USEC/OED	Sarah Schoedinger / Meka Laster	704-370-3528 / 301-713-9437
MBDA	Cynthia Rios	202-482-1015
ITA	Brad Hess / Annette Henderson	202-482-2969 / 202-482-3995
DOC-OS/OHRM	Valerie Revelez	202-482-4425
NTIA/BTOP	Wayne Ritchie / Laura Pettus	202-482-5515 / 202-482-4509

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Grants Online Training and Help Desk

▪ Grants Online Website

- Looking For More Information About Grants Online?
 - Go to the Grants Online PMO website at <http://www.corporateservices.noaa.gov/grantsonline>
- Have A Question When Training is Over?
 - Email the Help Desk at GrantsOnline.Helpdesk@noaa.gov
 - Call **301-444-2112** or **1-877-662-2478** toll free
 - Hours: **8:00 AM – 6:00 PM Eastern**
- Ready to start working in Grants Online?
 - Go to <https://grantsonline.rdc.noaa.gov>

Grants Online User Roles - Federal

FUNCTIONS/ROLES	Cert FPO	UnCert FPO	Pgm Office Staff	Budget Officer (Auth Official)	Pgm Office Reviewer	Pgm Office Requester	NEPA Official	Selecting Official	GMAC	Grants Specialist	Grants Officer
View Awards	X	X	X	X	X	X	X	X	X	X	X
Create RFA (Including FFO and Synopsis)	X	X	X								
Review FFO and Synopsis	X	X	X	X	X	X	X	X	X	X	X
Review Reviewer Instructions	X	X	X								
Manage Competition	X	X	X								
Be Assigned Program Officer on RFA	X	X	X								
Be Assigned Program Officer on Application	X	X	X								
Notify Recipients for Non Competitive Apps	X										
Accept Competitive Applications								X			
Approve Selection Package								X			
Forward Documents to FALD	X							X			
Complete Negotiations	X	X	X								
ACCEPT Minimum Requirements Checklist	X	X	X								
REJECT Minimum Requirements Checklist	X										
Complete PO Checklist	X	X	X								
Certify and Forward PO Checklist	X										
Complete and Forward NEPA Document	X	X	X				X				
Approve NEPA Document											
Complete and Forward Procurement Request	X	X	X								
Be Requester on Procurement Request	X	X	X	X	X	X	X	X	X	X	X
Review Procurement Request	X	X	X	X	X	X	X	X	X	X	X
Authorize Funds on Procurement Request				X							
Initiate Partial Funding	X	X	X								
Initiate Award Action Request	X**									X	
Initiate Amendment										X	
Complete Administrative Review of Award File										X	
Approve Award											X
Accept Progress Report	X										
Accept Financial Report											X
Authorize Bureau User Access to Grants Online									X		X

** Special Approval Needed from GMD Chief and GMAC Representative

Grants Online User Roles - Grantee

FUNCTIONS/ROLES	Recip Auth Rep	Recip Admin	Recip PI/PD	Recip Biz/Fin Rep	Recip Key Person
<i>View Awards</i>	X	X	X	X	X
<i>Initiate Award Action Request</i>	X	X	X		X
<i>Submit Award Action Request</i>	X				
<i>Accept or Reject Award</i>	X				
<i>Manage Recipient Users</i>		X			
<i>Complete Progress Report</i>	X	X	X		
<i>Submit Progress Report</i>	X		X*		
<i>Complete Financial Report</i>	X	X		X	
<i>Submit Financial Report</i>	X			X*	

* Recipient Administrator Needs to grant "Submitting" Role

Grants Online User Role Definitions

ROLE NAME	DEFINITION
ASAP Authorizer	This role is given to the users who are responsible for the first step in setting up a new award in the ASAP System (for current ASAP recipients) or adding funds to a current award as appropriate.
Budget Officer (Procurement Request Authorizing Official)	The "Budget Officer" role in Grants Online should be given to users who are actually Procurement Request Authorizing Officials. The person with this role checks availability of funds for the award and provides final approval for the Procurement Request (CD-435) of those funds as well as validation of the ACCS codes if not already done. This role has an accompanying threshold amount which the system uses to verify authorization to commit Program Office funds.
CAMS First Approver CAMS Second Approver CAMS First and Second Approver	These roles are given to users responsible for entering grant obligations into the instance of the Department of Commerce's CBS that tracks financial actions for that particular Bureau. The business process is slightly different at different bureaus so the various roles reflect these differences.
Credit Checker	This role is given to the user within a particular Bureau who is responsible for requesting credit checks as needed during the preparation of an award file for Grants Officer signature.
FALD	This role is given to users in the Department's Financial Assistance Law Division who are assigned to a particular Bureau.
Federal Program Officer - Certified	This role is given to a person who is responsible for the development of funding announcements, application reviews, and the processing of award and post-award recommendations to be sent to the Grants Management Division. Within Grants Online, only FPOs who are Certified can communicate between their own Program Offices and outside entities such as FALD, GMD, and Recipients. For instance, an Uncertified FPO cannot "Certify" a PO Checklist or forward an Award File to the Grants Management Division. Persons given this role are assumed to have obtained a certain level of training in the Grants Management arena.
Federal Program Officer - Uncertified	This role is intended for persons who are on track to become Certified Federal Program Officers but have not yet obtained the necessary credentials required by their Line Office. They may assist with all tasks normally done by a Certified Federal Program Officer, but cannot forward any documents to entities outside of their own Program Office. The documents must be reassigned to a Certified Federal Program Officer for that purpose.
Finance Office	This role is given to users to perform various Finance related roles such as ASAP Certifications and financial closeout activities.
GIMAC (Grants Management Advisory Committee)	This role is reserved for the official members of the NOAA Grants Management Advisory Committee and their designated back-ups, along with the points of contact for the non-NOAA bureaus. There are usually one or two GMAC users within each Line Office. The users with this role are responsible for authorizing the addition, updating, or removal of Grants Online users within their respective Line Offices.
Grants Officer	This role is reserved for Grants Management Division personnel who have been given authority to make award offers to recipients on behalf of DOC. They also make the final decisions with regard to approval or denial of Award Action Requests. This role is accompanied by a system enforced approval threshold for funding.
Grants Specialist	This role is given to Grants Management Division personnel who have responsibility for administrative processing of award files in preparation for DOC's offer to the recipient. They are also responsible for the review of Financial Reports and Award Action Request recommendations from the Program Offices.
NEPA Official/Coordinator	NEPA Official reviews and approves the NEPA documentation as part of an Award File prior to submission to GMD.

Grants Online User Role Definitions

OLA	This role is given to the person who will perform Bureau-level functionality in the Grants Notification System (GNS) relating to congressional notifications of awards. The person with this role will receive notifications from Grants Online that a record has been sent to the GNS system. They do not need to log into the Grants Online system to do any work, but they need to have an account in Grants Online in order to receive the notifications.
Program Office Requestor	The role of Program Office Requestor is given to a user whose only function is to provide first-level "Requestor" approval on Procurement Requests (CD-435) prior to submission to the Budget Officer.
Program Office Reviewer	This role is usually given to a person who needs to be included in the workflow to review a Request For Application (RFA), a Procurement Request, or a Project Progress Report (PPR) but has no other role in Grants Online.
Program Office Staff	This is a staffing role to Federal Program Officers. They may assist in the development of RFA's, assist in the paper application process, assist in the review process, and complete the PO checklist as necessary. Users with this role have the same access in Grants Online as user with the role of Uncertified Federal Program Officer.
Progress Report Reviewer	This is a Federal Program Office role given to a user whose only responsibility is to review Project Progress Reports received from the grant recipients. This functionality can also be done by users with other Program Office roles such as Federal Program Officer (Certified or Uncertified), Program Office Staff, and Program Office Reviewer
Public Affairs Liaison	This role is given to users who need to be notified about grant awards for the purposes of doing press releases and/or other Public Affairs type activities that are not tied to the Congressional notifications which are performed by personnel using the Grants Notification System (GNS).
Recipient Administrator	Users with this role have the permissions needed to set up other people in their organization as users of the Grants Online system and to give them access to specific awards as appropriate.
Recipient Authorized Representative	This role is intended for recipient users with signature authority to sign official grant documents such as an SF-424 (application), or countersigns an Award document such as a CD-450 (new Award) or CD451 (amendment). More than one person can have this role at any organization; however on each Award one person will be designated the primary "Authorized Representative". (Designation as "primary" does not provide any additional access to awards in Grants Online.)
Recipient Business/Finance Representative	This role should be given to recipient users who need to fill out Financial Reports (SF-425, SF-272 or SF-270, SF-269). There are two versions of this role - users with a "submitting" role can submit Financial Reports directly to DOC; users without the "submitting" role can only forward the Financial Reports to their Authorized Representative who can in turn submit them to DOC. Both versions of this role will allow the user to initiate an Award Action Request (AAR) but all AARs must first be forwarded to an Authorized Representative for submission to DOC.
Recipient Principle Investigator	This role should be given to recipient users who need to fill out Project Progress Reports (PPRs). There are two versions of this role - users with a "submitting" role can submit PPRs directly to DOC; users without the "submitting" role can only forward the PPRs to their Authorized Representative who can in turn submit them to DOC. Both versions of this role will allow the user to initiate an Award Action Request (AAR) but all AARs must first be forwarded to an Authorized Representative for submission to DOC.
RFA Publisher	This role is given to users who are responsible for posting grant opportunity notices at Grants.gov and for overseeing the bureau and department level review, approval, and publication of Federal Register Notices.
Selecting Official	The role of Selecting Official is given to a user who has the authority to approve the Selection Package generated from applications received in response to a Competitive funding announcement.
View Program Office (Line Office, Agency)	This role is available for Federal staff who need view-only access to Grants Files. The role is available at three different levels: Program Office, Line Office, or Bureau (Agency).



Training Manual

Grants Online System Navigation

Grants Online Release 4.06

Last Update: May 5, 2011

Getting Started

Accessing Grants Online

1. Click on the Internet Explorer Icon on your desktop or Start Menu
 - Internet Explorer browser opens
2. Enter the following URL information in your address bar of your browser:

<https://grantsonline.rdc.noaa.gov> then press **ENTER**

 - *Grants Online Home Page/Login Screen* appears



Note: Screen shots still contain the NOAA logo (as a holdover from the previous manuals) instead of the new DOC logo. Future updates to this manual will include screen shot updates with the DOC logo.

3. Before logging into Grants Online, from this screen you can access the Public Search feature as well as other useful links, including the Grants Online Training page.

The screenshot shows the Grants Online login page. At the top, there is a banner with the Department of Commerce logo and the text 'Welcome to Grants Online'. Below the banner, there are several columns of links and information. A red box highlights the login form, which includes fields for 'Username' and 'Password', an 'Enter' button, and links for 'Forgot your username?' and 'Forgot your password?'.



Warning!

If you entered your username or password incorrectly you will see an error message in red on the screen. After three unsuccessful attempts to log in, the system will lock you out and you will have to click on the "Forgot your Password?" link to reset it using your security questions.

If you "Forgot your username", click on that link for the Help Desk phone number.

Grants Online Navigation Features

Overview Navigating Grants Online is a simple process. The look and feel of the system requires the use of a mouse and keyboard for navigation. Access to certain features of Grants Online is based on your user role. Your user role determines the required access for you to do your work in Grants Online.

Screen Layout



Screen Layout Defined

Once you have successfully logged into Grants Online, the system will default you to the Inbox tab. Grants Online is actually broken into several areas:

- **Tabs:** Highlighted by the gold border and located at the top of the page are Grants Online Tabs. Use the Tabs to navigate within the different areas of Grants Online. Click on the appropriate Tab to navigate to the desired area.



Note: Access to various Tabs is determined by your user role. A grayed out Tab will denote restricted areas. If trying to access a restricted area, a pop up message will display, stating "Unauthorized to access this area" (see below).



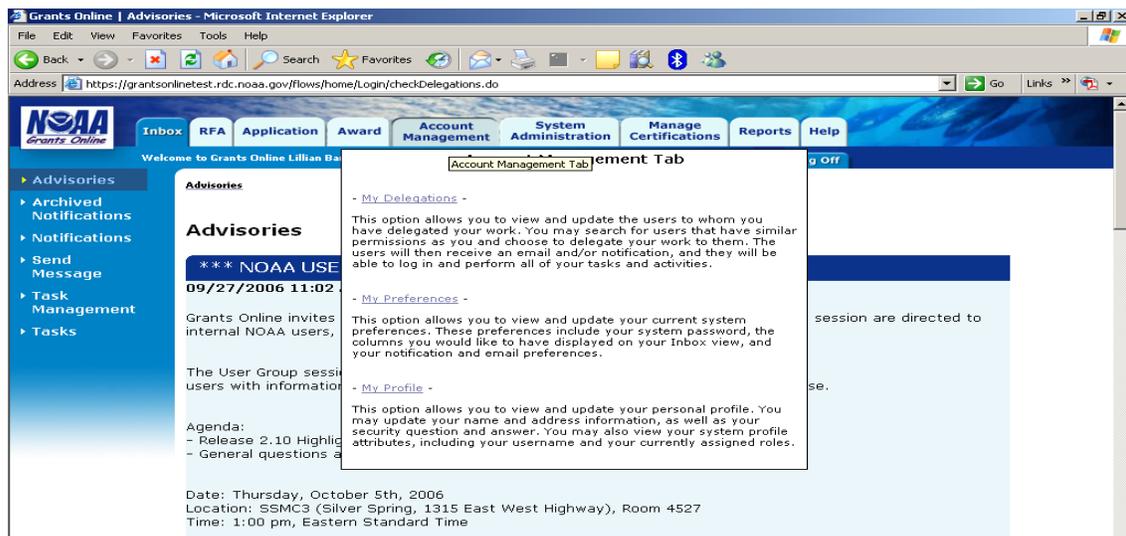
- **Navigation Pane:** Highlighted by the red border, is the navigation pane. Based on the Tab that you are currently on, commands for certain function display here. Click on the desired command to go to that specific screen.
- **Document Pane:** Highlighted by the black border, is the document pane. This is located in the middle of the screen. This is where most of the data in Grants Online will be input.

Other User Interface Features

Since the go-live of Grants Online in January 2005, other features have been added to the User Interface to facilitate the ease of navigation through the system.

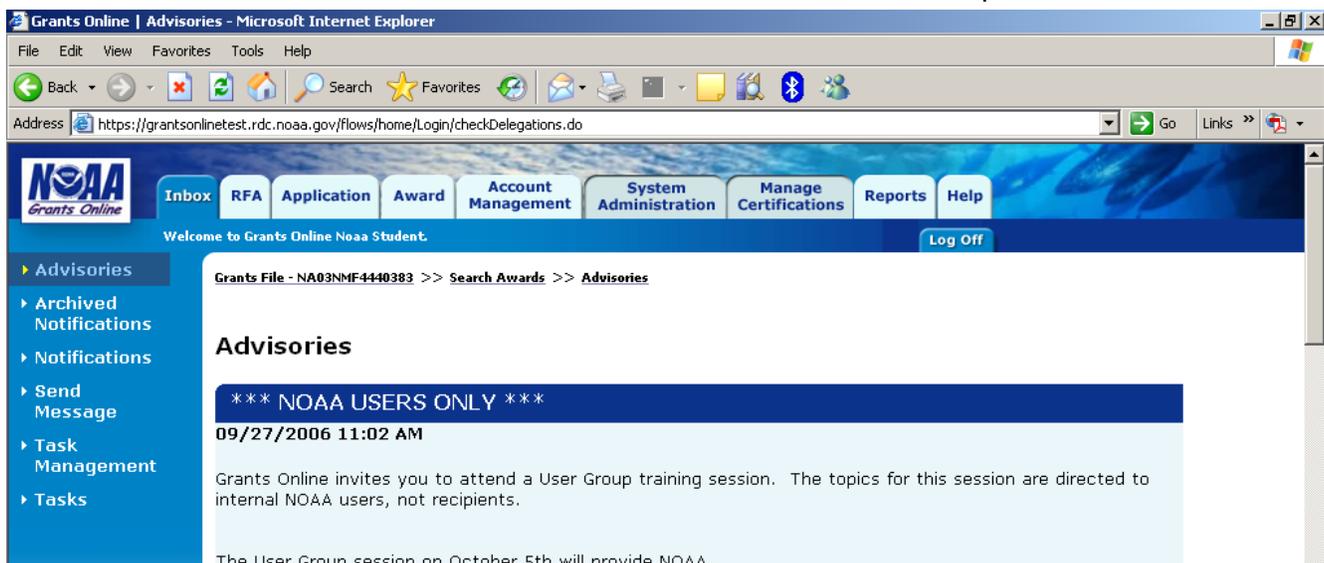
Pop Up Short Cuts

When placing your cursor over a tab at the top of the screen you will get a pop-up menu that contains the same links as the left navigation pane for that tab. This will allow you to navigate directly to one of those areas without clicking on the tab first.



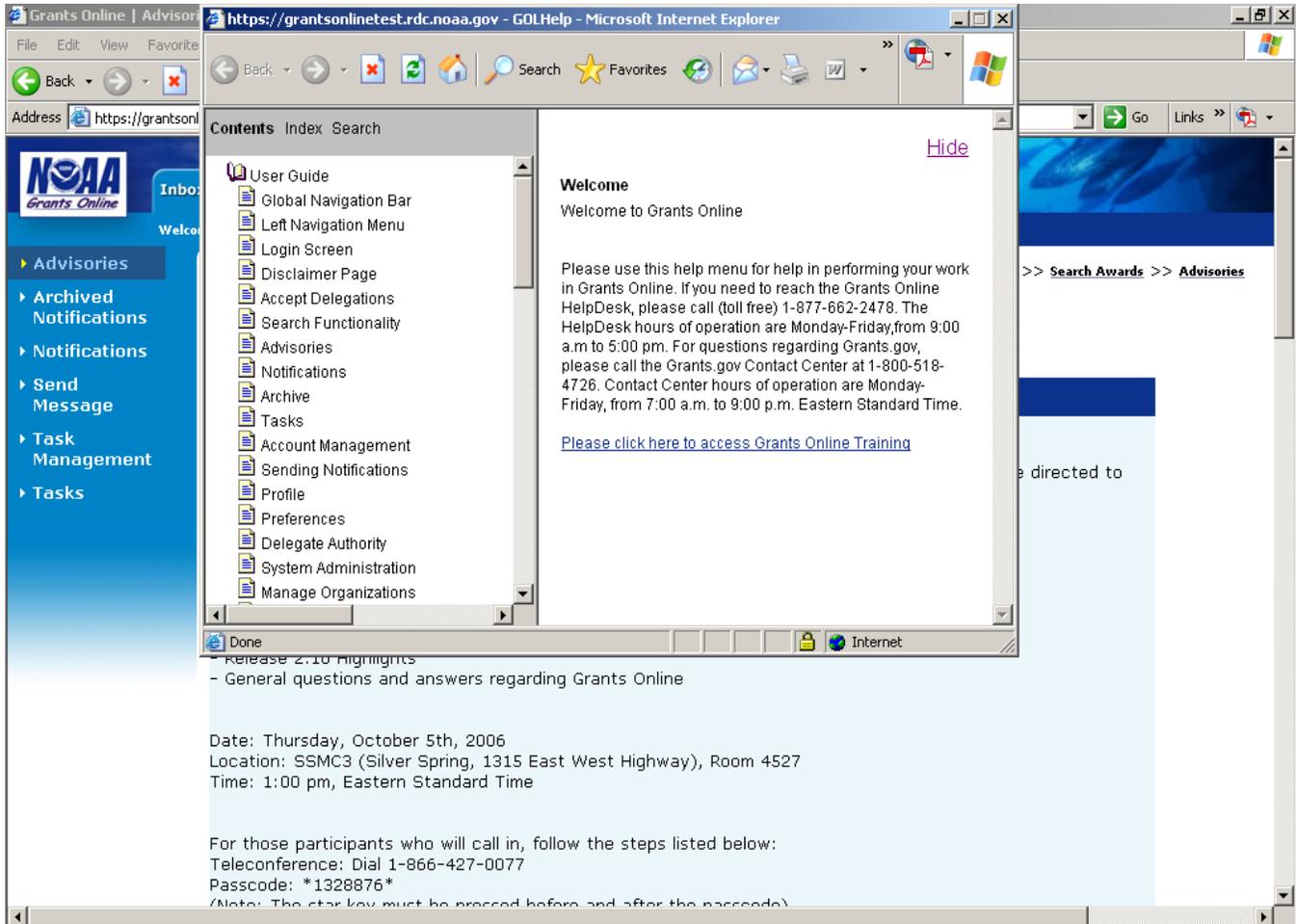
Breadcrumbs

The Grants Online system keeps track of the pages you have visited since you last logged on and put a "breadcrumb trail" of those pages at the top of the Document Pane. This feature can be used in place of a "Back" button.



Help Tab

The Help Tab provides information on accessing the Grants Online Help Desk as well as definitions and/or guidance for various Grants Online functions.



Inbox Tab

Tasks

While Notifications alert you to an action you must complete, Tasks allow you to complete that action assigned to you within the workflow. Tasks that are assigned to you can be located in the Task section in the Inbox Tab.

Accessing Tasks

- From the Inbox Tab, click **Tasks**
 - Your Tasks screen appears

View	Award Number	Task Id	Task Received Date	Task Name	Approved Federal Funding	Total Federal Funding	Task Status	Document Type	Start Date	Document Id
View	N/A	253670	11/30/2006	Review	N/A	N/A	Not Started	Omnibus Synopsis		2050830
View	NA07SEC4690002	251480	11/21/2006	Procurement Request and Commitment of Funds	N/A	\$150,000.00	In Progress	Procurement Request and Commitment of Funds	11/21/2006	2050787
View	NA07SEC4690002	251479	11/21/2006	Review Release of Funds	N/A	\$150,000.00	Not Started	Award File		2050786
View	NA06MNS4730010	250285	11/16/2006	Review	N/A	\$90,410.00	Not	Award		2050762



Note: Customizing the Tasks view may be accomplished through the Account Management Tab.

Viewing a Task

- Click **View** next to the task you wish to view
 - Launch Page* appears. From this page you may perform your assigned work by selecting an action in the action dropdown.

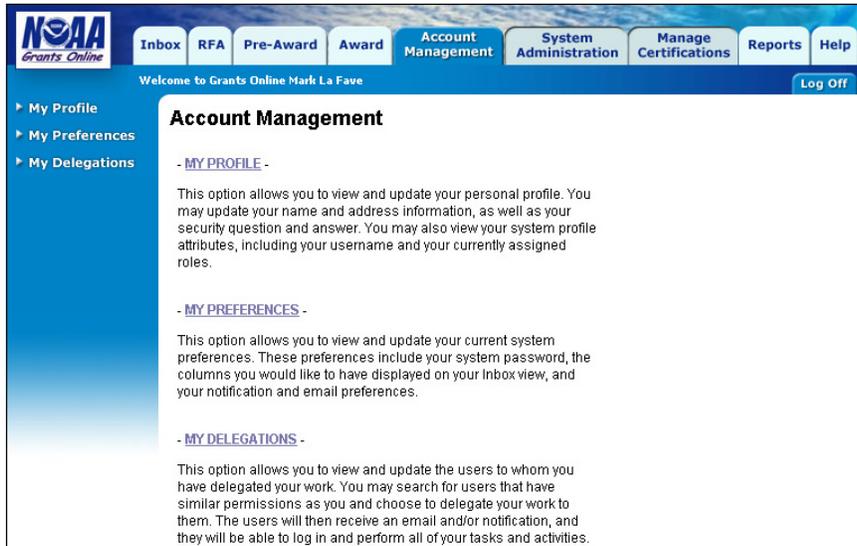
Filtering Tasks

- Select the **Document Type** in the drop-down menu
- Select the **Status** in the drop-down menu
- Click **Apply Filter**
 - Tasks** screen appears showing only filtered tasks.

Document Type: All
 Status: Open
 Apply Filter

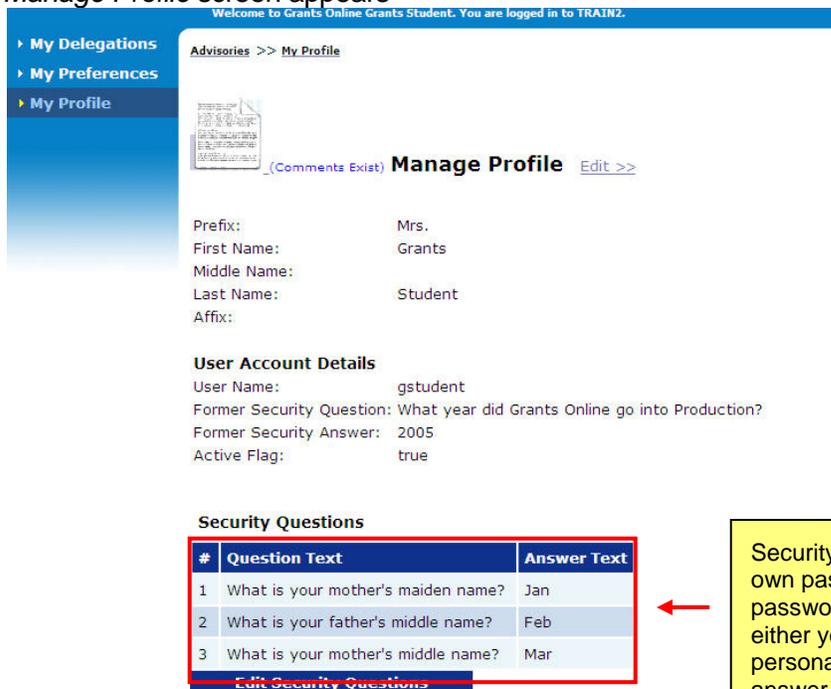
Account Management Tab

The Account Management Tab allows you to view your Profile, Preferences and Delegations. Within this tab you can update your profile, customize your Notifications and Tasks preferences, and delegate your inbox to other users.



Accessing My Profile

- From the Account Management Tab, click **My Profile**
 - *Manage Profile* screen appears



Security Questions are used to allow you to reset your own password. If you call the Help Desk to request to a password reset, the support specialist will ask you either your former security question or one of these personalized questions and you will provide the answer as a means of authenticating the caller.



Note: To change roles and affiliations, contact the Help Desk

Editing Your Profile

1. Click **Edit** (once you click edit, the screen will become formatted like the one below)
2. Make the necessary changes (*Click on the "Details" link under Affiliations to update phone, address, and/or email information.*)
3. Click **Save** to capture your changes
4. Click **Save and Return to Main** to return to the Account Management tab main screen
5. Click **Cancel** to go back to the previous screen (any changes you made will NOT be saved)

Manage Profile
(Comments Exist)

Prefix:

First Name: *

Middle Name:

Last Name: *

Affix:

User Account Details

User Name: gstudent
 Former Security Question: What year did Grants Online go into Production?
 Former Security Answer: 2005
 Active Flag: true

Security Questions

#	Question Text	Answer Text
1	What is your mother's maiden name?	Jan
2	What is your father's middle name?	Feb
3	What is your mother's middle name?	Mar

[Edit Security Questions](#)

Affiliations

Details	Org ID	Organization	Position	Phone	Address	E-Mail	Fax	Primary	Active
Details	2002200	GOT One Commerce Program Office (OCPO)		301-555-1212	20020 Century Blvd, Germantown, MD 20874-1143 USA	testemail@msg2.rdc.noaa.gov		true	true

Assigned Roles

Role	Org ID	Organization
Federal Program Officer - Certified	2002200	GOT One Commerce Program Office (OCPO)
Primary Office Contact	2002200	GOT One Commerce Program Office (OCPO)

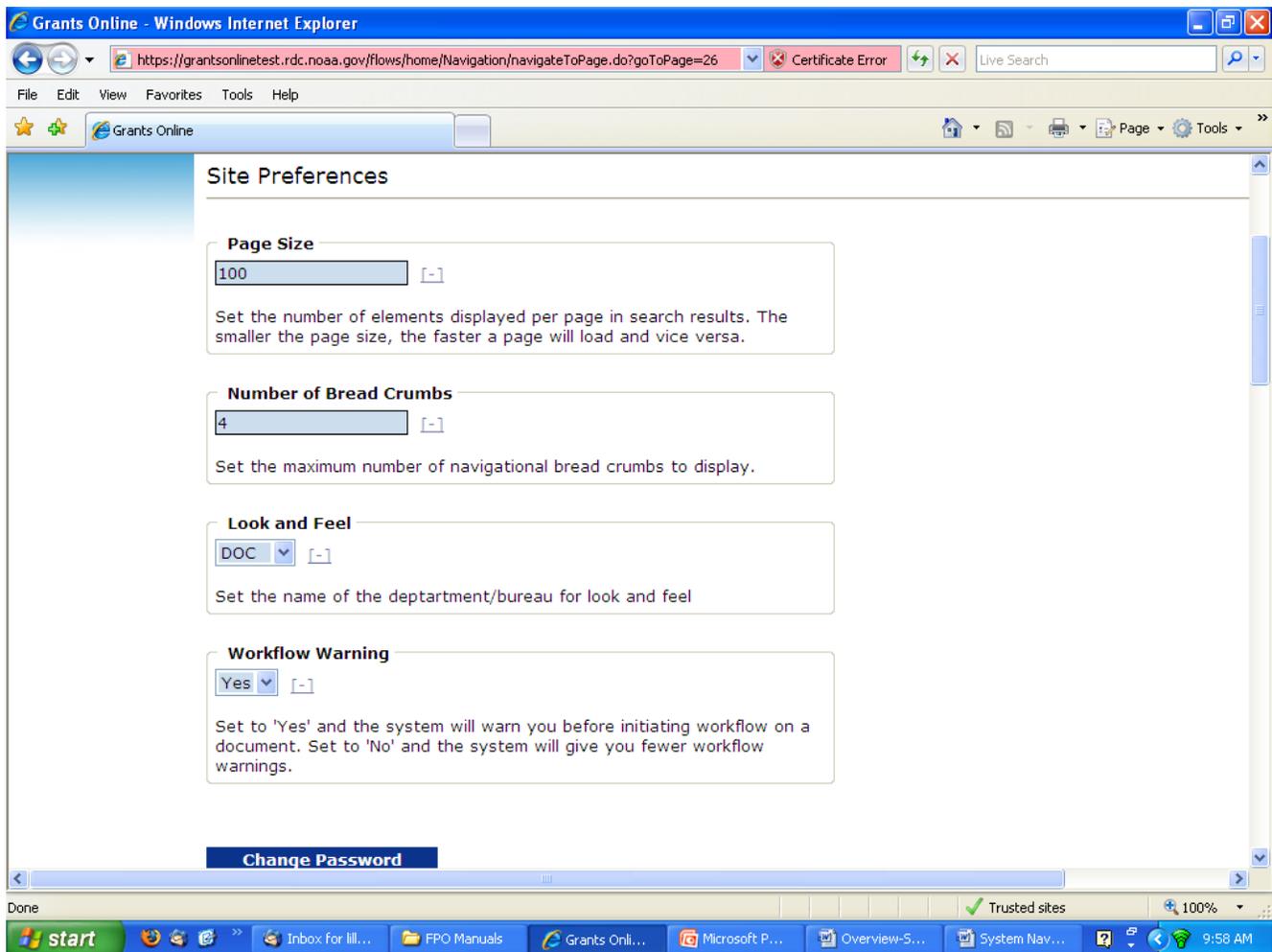
[Done](#)

My Preferences

Customize your viewing preferences through the *My Preferences* screen. You may add/remove email Inbox notifications. This will remove notifications sent to your external email account only. Headings may be customized to display certain fields on your Tasks and Notifications screens. Additionally, you may change your password for Grants Online.

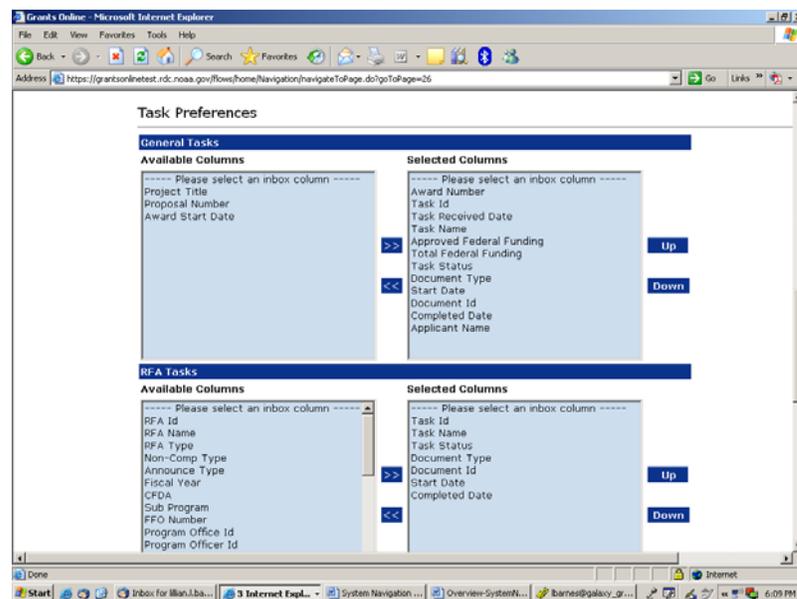
Accessing My Preferences

1. From the Account Management Tab, click **My Preferences**
 - *User Preferences* screen appears
2. Customize Page Size, Bread Crumbs, Look and Feel, and Workflow Warning as desired.
3. Click **Save** at the bottom of the page.



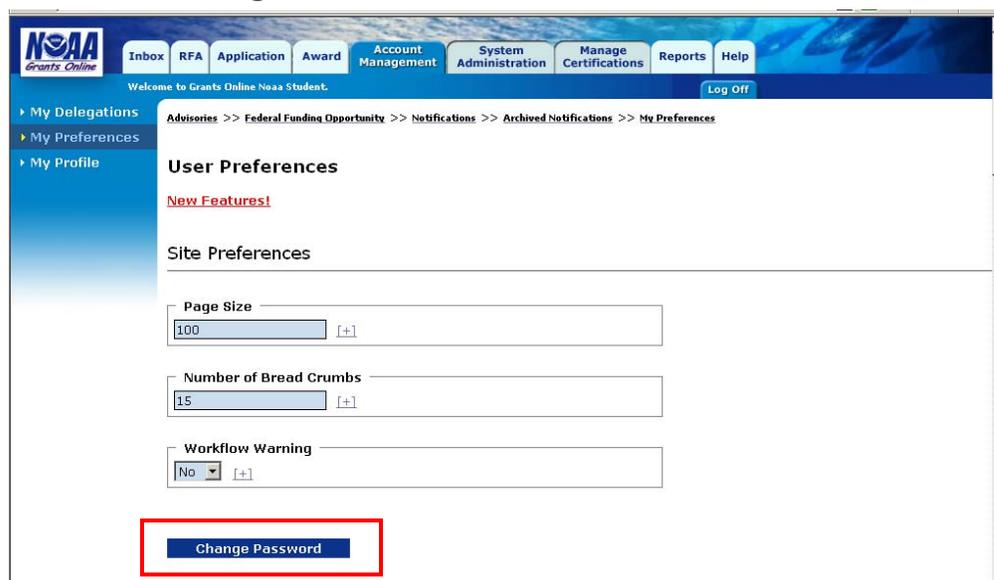
Customizing Tasks

1. Select desired type of Notification to enable/disable
2. “Push” and “Pull” task columns to select the desired columns for display in *Your Inbox*.
3. Use “Up” and “Down” buttons to select the desired column order for display in *Your Inbox*.
4. Click **Save** at the bottom of the page.



Changing Password

1. Click the blue **Change Password** button in the *User Preferences* screen



2. Change Password screen appears.

NOAA Grants Online

Inbox RFA Pre-Award Award Account Management System Administration Manage Certifications Reports Help

Welcome to Grants Online Solomon King Log Off

My Profile
My Preferences
My Delegations

Change Password

Old Password :*

New Password :*

Confirm New Password :*

Submit Cancel

Password Guidelines :

- Passwords must contain at least eight(8) non-blank characters.
- Passwords cannot contain quotation marks.
- Passwords are not case sensitive.
- A Password must begin with an alphabetic character.
- At least one of the characters must be a number(0-9) or a special character(_,\$,#).
- Six of the characters may only occur once in the password.

3. Enter old password.
4. Enter new password.
5. Enter new password again to confirm.
6. Click **Submit**.



Note: Please follow the indicated Password Guidelines. Also, note that the special characters listed are the ONLY ones that are valid (_,\$#)

My Delegations

When you select the My Delegations link in the Account Management Tab, you will be able to view existing delegates, add delegates and rescind delegates. The only people you can select to be a delegate are those that have roles matching yours. Example – a Program Officer cannot create a delegation to an individual who only has the role of Budget Officer.

Accessing My Delegations

- From the Account Management Tab, click **My Delegations**
 - *Delegate Authority* screen appears

NOAA Grants Online

Inbox RFA Pre-Award Award **Account Management** System Administration Manage Certifications Reports Help

Welcome to Grants Online Solomon King Log Off

My Profile
My Preferences
My Delegations

Delegate Authority

You currently have no peers on your list of delegates

Search for Peers
Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.

First Name:

Last Name:

Organization:

Role:

- AGO
- Awardee
- Budget Officer
- CAMS Finance Representative

Find Peers

Adding a Delegation

- Search by First Name, Last Name, Organization or Role
- Click **Find Peers**
- Select delegations
- Click **Delegate**

Delegate Authority

You currently have no peers on your list of delegates

Search for Peers
Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.

First Name:

Last Name:

Organization:

Role:

- AGO
- Awardee
- Budget Officer
- CAMS Finance Representative

Find Peers

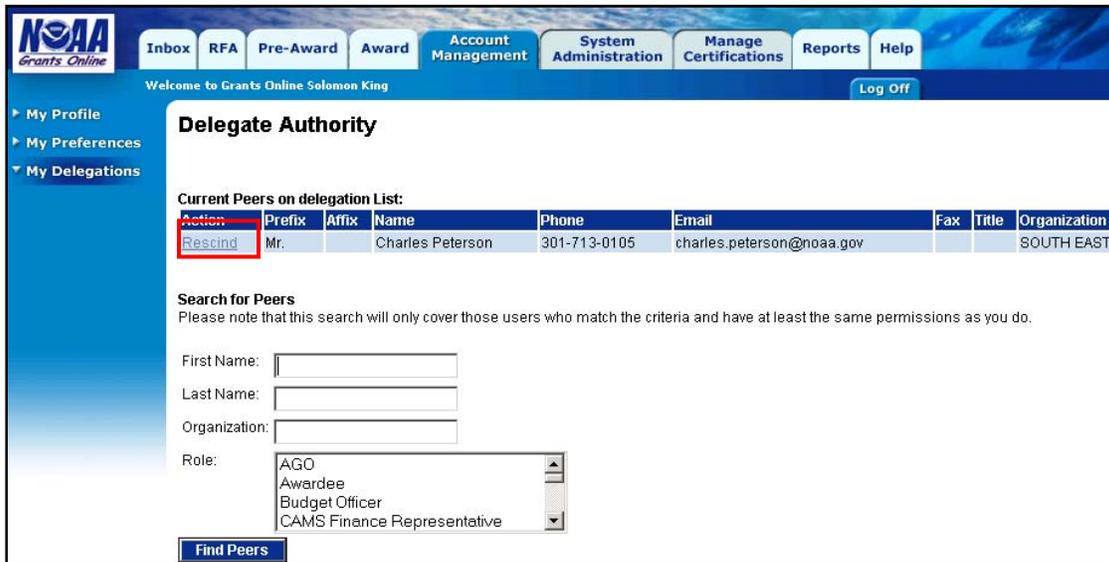
Search Results

Peterson Charles

Delegate **Share**

Rescinding a Delegation

1. From the Account Management Tab, click **My Delegations**
 - My Delegations screen appears
2. Click on **Rescind** to remove the individual as your delegate



Logging in as a Delegate

1. Log in to Grants Online with your normal user name
2. Click **OK** on the *Notice to Users* page
3. Choose to either continue in as yourself (**Continue to Inbox**) or to go in as the person who delegated to you (**Select** – by the person's name)



Warning!

It can take up to three minutes for the system to process your request to go in as a delegate .

Select	User Name
Select	Solomon King

[Continue to Inbox](#)



Note: When you are in Grants Online as a delegate, the system will identify you as a delegate of that individual (see below). ** Both you and the delegate can work in Grants Online simultaneously.

OPERATING AS DELEGATE FOR SOLOMON KING

Federal Program Officer Training Agenda

Day 1 - PM

Session 2: Universal RFA Creation/ Application Processing 10:30 am – 4:30 pm	
Topic	Duration
Introduction and Agenda	10:30 – 10:35 (5 min)
Online Demonstration and Hands-On Exercise with Process Maps: Completing a Non-Competitive RFA	10:35 – 2:00 (3 hours and 25 min with ~1hr lunch break)
Online Demonstration and Hands-On Exercise with Process Maps: Processing a Non-Competitive Application	2:00 – 4:15 (2 hours and 15 min with break)
Additional Resources and Training Questions and Comments Evaluations	4:15- 4:30 (15 min)

Objectives – By the end of this class students should:

- Understand the difference between a Competitive RFA and all other types of Universal RFA (previously lumped under the label “Non-Competitive”)
- Understand the difference between the Certified and Un-Certified FPO/Program Office Staff roles
- Be able to create and route any variety of Universal RFA
- Be able to input a paper application and complete “Review Minimum Requirements” task
- Be able to Conduct Negotiations and prepare an Award File for GMD review
- Understand the Award File approval and acceptance process
- Understand where to find additional help when needed

Training Materials:

1. Agenda and Objectives
2. Student Screen Shots with Process Maps
3. Course Evaluation



**Grants Online Training
Student Screen Shots
Universal RFA
and
Application Processing**

November 2012



Universal and Competitive RFA Fields Posted to Grants.gov

- Opportunity Number – **Federal Opportunity Number**
- Opportunity Title – **RFA Name**
- Opportunity Category - (**"Discretionary"** for Competitive RFA, **"Other"** for Universal RFA)
- Category Explanation (if opportunity category is "Other"): **RFA Type**
- **CFDA Number**
- Posting Date – **Publication Date**
- Close Date – **Application Due Date**
- Close Date Explanation - (**AS NEEDED**)
- Agency Contact – **RFA Publisher** (*Person listed as contact for users having difficulty downloading the application forms*)
- Email Address – (*Email address of Agency Contact*)
- Open Date – (*Most of the time, same as Posting Date*)
- Application Package – **Forms listed on Application Package Details screen**
- Application Instructions – **File attached to Application Package Details screen, or generic instructions if no file was attached.**

Notes:

1. Assigned Program Officer on the RFA needs to be a "Certified FPO" in order to forward the documents through workflow.
2. For both *Universal* and *Competitive* RFAs you will need to establish the person or persons in your program office who will receive the applications for their initial minimum requirements check .

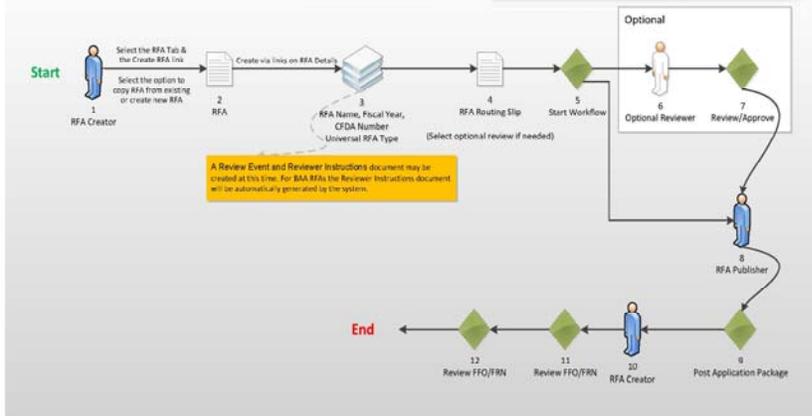


Universal Process – RFA Creation

Create RFA, Post Application Package Overview (UNI-1)

May 23, 2012

Version 4.09



RFA Details

RFA Header Information

Document ID: 2199733
 RFA Name: Universal RFA
 Fiscal Year: 2011
 Announcement Type: I
 Funding Opportunity Number: NOAA-GOT-OCPO-2011-2002849
 Line Office: Grants Online Training (GOT)
 Assigned Program Office: GOT One Commerce Program Office (OCPO)
 Assigned Program Office: Student, Grants
 CFDA Number: 11.999 - Grants Online Training Program
 SubProgram: -Select a Sub Pro
 RFA Type: Noncompetitive

RFA Additional Information

Anticipated Funding Amount for All Recipients: \$
 Application Due Date: (MM/DD/YYYY)
 Anticipated Award Date: (MM/DD/YYYY)
 Search Results: nothing found to suggest
 Selected Federal Addresses: No addresses have been selected.
 Selected Federal Contacts: No contacts have been selected.
 Recipient Information/Application Data: Add Recipient

Mission Goals Information * No mission goals have been selected.
[View/Edit](#)

Application Routing *
 No Program Officers are assigned to receive applications.
[View/Edit](#)

Application Package *
 An application package has not been selected.
[View/Edit](#)

Minimum Requirements *
[View/Edit](#)

Special Award Conditions
 No Special Award Conditions are associated with the RFA.
[View/Edit](#)

Matching Requirements
 No Matching Requirements have been defined.
[View/Edit](#)

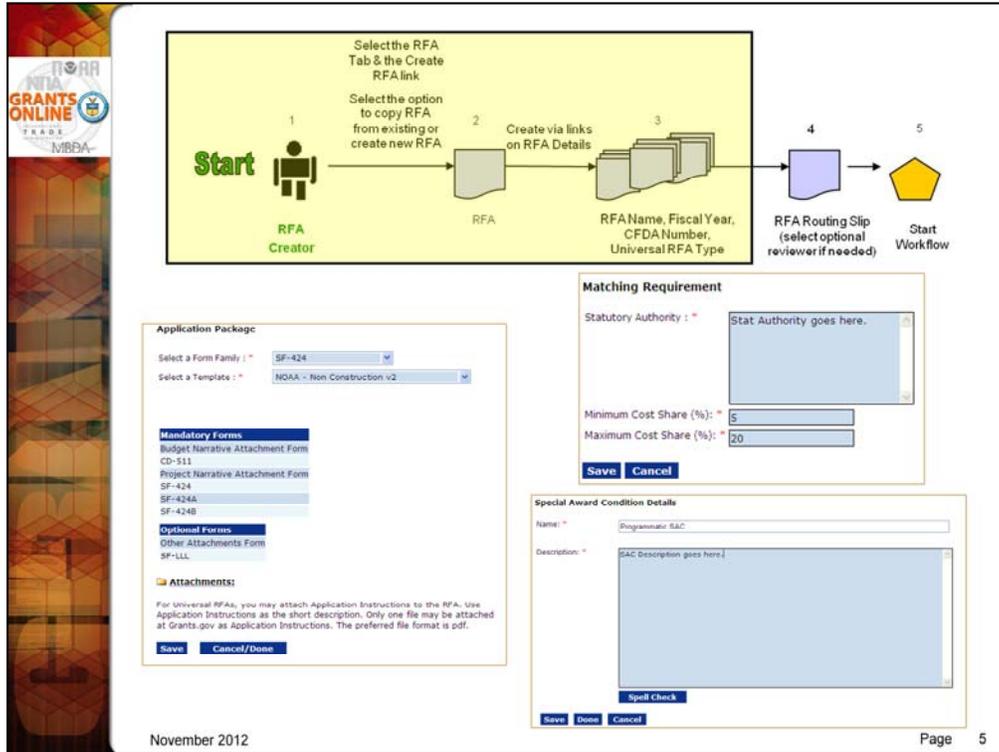
Attachments:
 No attachments.
 Add new Attachment: [1]
 Any changes to information on this page should be saved before adding or removing attachments.
[Large File Guidance](#)

Save RFA Routing Slip - Start Workflow Cancel

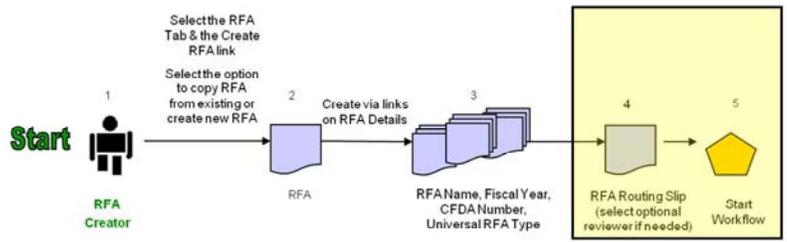
November 2012 Page 4

Recipient – High Resolution Systems
 DUNS – 602201043

When adding the recipient to the RFA do the lookup by the DUNS number.



Most NOAA Program Offices use the Standard Non-Construction application package. If the Program Office has specific instructions to the recipient they may be attached on the Application Package screen; otherwise, the RFA Publisher will upload a generic document.



Routing Slip

RFA Creator
 It is recommended, although not required that an RFA creator be a Grants Online user with certified program officer role, or equivalent permissions. Within the context of RFA workflow, this is pre-determined to be the person creating the RFA. Further, this role selects optional reviewers and initiates application package posting.

Participant Name	User Name
RFACreator	Grants Student

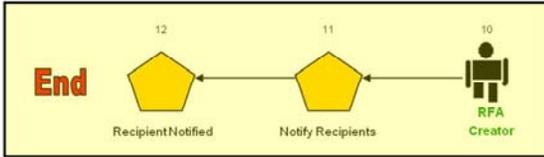
Optional Reviewer
 An RFA can be sent for optional review. You may select one or more person(s) as optional reviewers. If you select optional reviewers, please note that you will have to wait for ALL optional reviews to come back before you can initiate application package posting.
 Nothing found to display.

[Add Optional Reviewer](#)

RFA Publisher
 All RFA Publishers will receive a task to review this document. One RFA Publisher will claim ownership. This is the person who coordinates and publishes the Federal Register Notice and posts the FFO on Grants.gov for competitive announcements. This person also posts the application package at Grants.gov for competitive and non-competitive announcements.

Participant Name
RFAPublisher

[Save Route](#) [Start Workflow](#) [Cancel](#)



Your Tasks

Document Type: All | Status: Open | [Apply Filter >>](#)

31 items found, displaying all items. 1

View	Task Name	Award Number	Task Received Date	Document Type	Project Title	Task Status	Document Id	Task Id	Start Date	Completed Date	Applicant Name	Proposal Number
View	Notify Recipients	N/A	02/03/2011	RFA	N/A	Not Started	2199733	1795365			N/A	N/A

RFA

Id: 2199733
Status: NotifyRecipients - Not Started

Action:

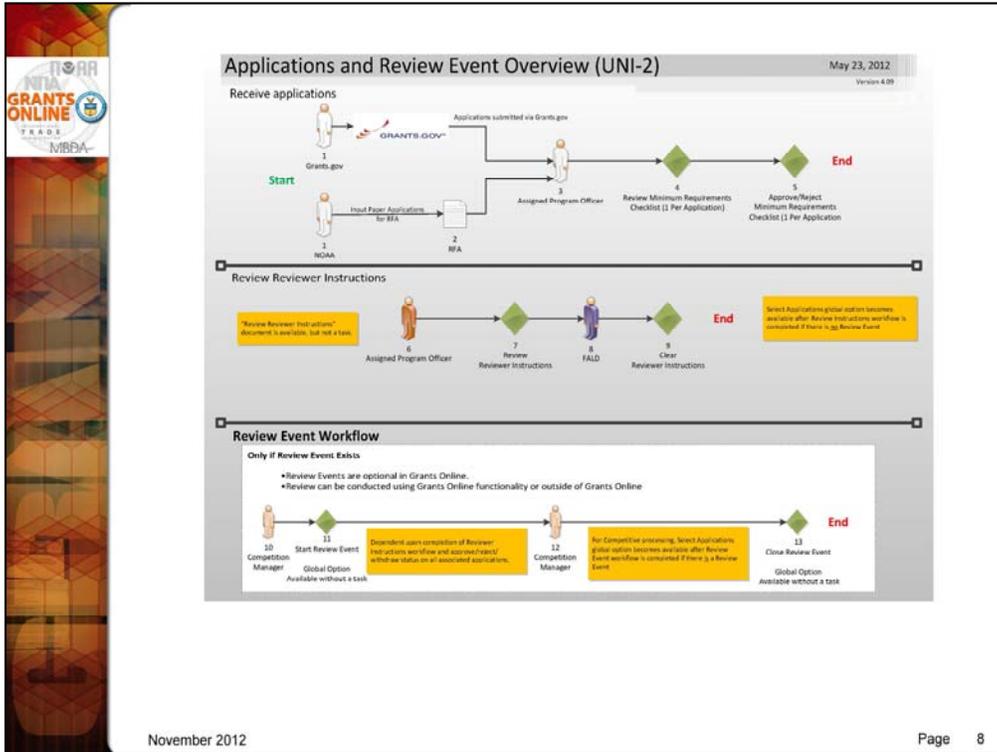
Your Comments:

[View RFA Details](#)

- Workflow History

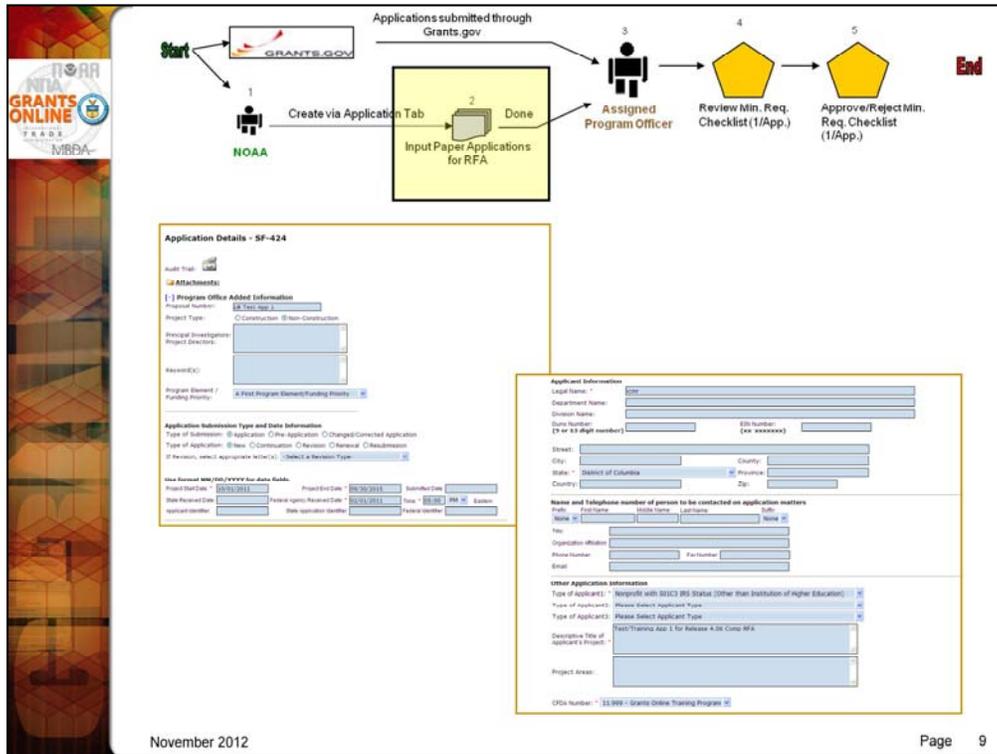
Name	Date Assigned	Date Started	Date Completed	Performed	Role	Action Taken	Current Status	User	Comments
Post	02/03/2011	02/03/2011	02/03/2011	Student	RFAPublisher	ApplicationPackagePosted	Complete		
Application Package	05:37:05 PM	05:37:39 PM	05:37:39 PM	Student	Creator				
Approve or Review	02/03/2011	02/03/2011	02/03/2011	Grants Student	RFACreator	InitiateApplicationPackagePosting	Complete		
	05:36:41 PM	05:37:04 PM	05:37:04 PM	Student					

Export options: [Excel](#)



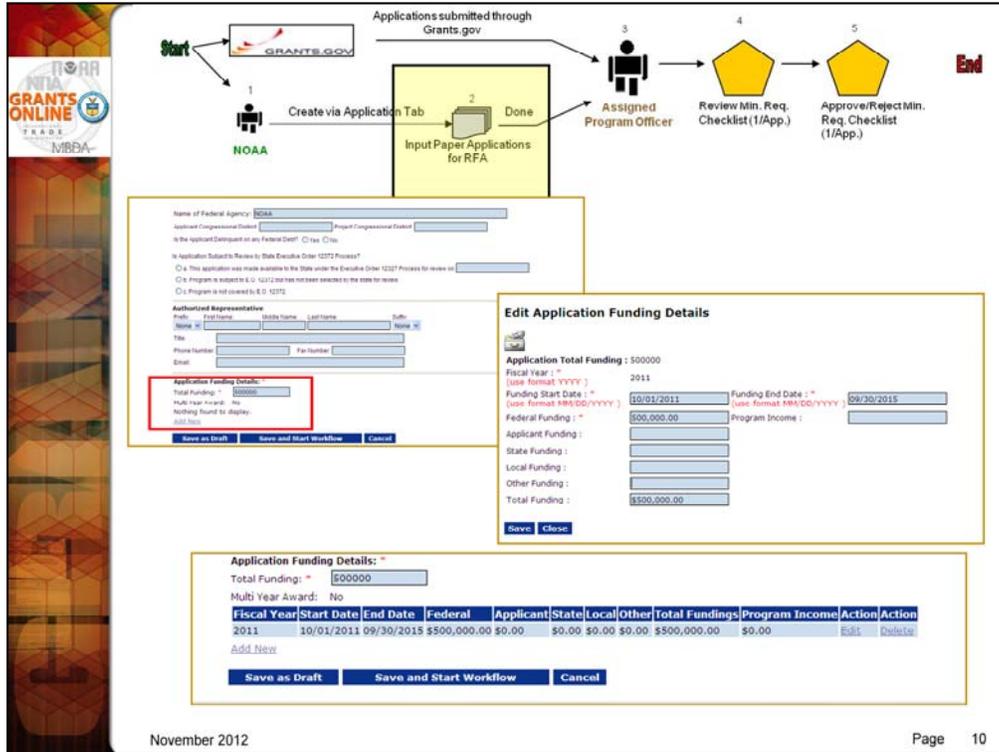
We will use the sample application in the training package for the data entry.

A review event is optional for the Universal process.



To start, select the “Input Paper Applications” menu item under the Applications tab. The data on the Application Details screen will already be filled in if the application comes in from Grants.gov. However, if a paper application is received by the Program Office the data must be entered on this screen. Only the required fields marked with an asterisk are required for the application processing to continue.

The Application Details screen contains most of the fields found on an SF-424. After entering required fields click “Save as Draft”. If you have missed any required fields you will get an error message with guidance regarding the missing fields.



The “Total Funding” amount includes both Federal and matching amounts.

Hint – After entering the “Total Funding” at the bottom of the screen, click on the “Save as Draft” button. You will get an error message, letting you know that you still need to enter the Application Funding Details; however, when you click on “Add New” the Funding Start and End Dates will be pre-filled from project dates on the main page. The dates do not pre-fill unless you click the “Save as Draft” button before the “Add New” button.

Applications submitted through Grants.gov

Start → GRANTS.GOV → 1 NOAA → Create via Application Tab → 2 Done → Input Paper Applications for RFA → Assigned Program Officer → 3 → 4 Review Min. Req. Checklist (1/App.) → 5 Approve/Reject Min. Req. Checklist (1/App.) → End

View	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date	Completed Date	Award N
View	1364984	Review Min. Req. Checklist	Not Started	Application	2138624			N/A
View	1364983	Notify Recipients	In Progress	RFA	2138600	12/01/2008		N/A

Minimum Requirements Checklist

Minimum Requirement	Met Requirement?	Comment
Received on Time	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/> <input type="button" value="Spell Check"/>
Correct Federal Funding	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/> <input type="button" value="Spell Check"/>
Correct Match	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/> <input type="button" value="Spell Check"/>
Complete Application	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/> <input type="button" value="Spell Check"/>

Overall Comments:

All requirements questions must be answered before the application can be approved or rejected for minimum requirements.

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If the “No” radio button is selected on any of the items of a Minimum Requirements Checklist, a comment should be entered in the associated comments box or in the General Comments box at the bottom. Currently, if no comment has been entered for a “No” radio button the user will not have an option to Approve or Reject the Minimum Requirement Checklist. In a future release the user will not be allowed to save the screen without a comment if a “No” radio button has been selected.

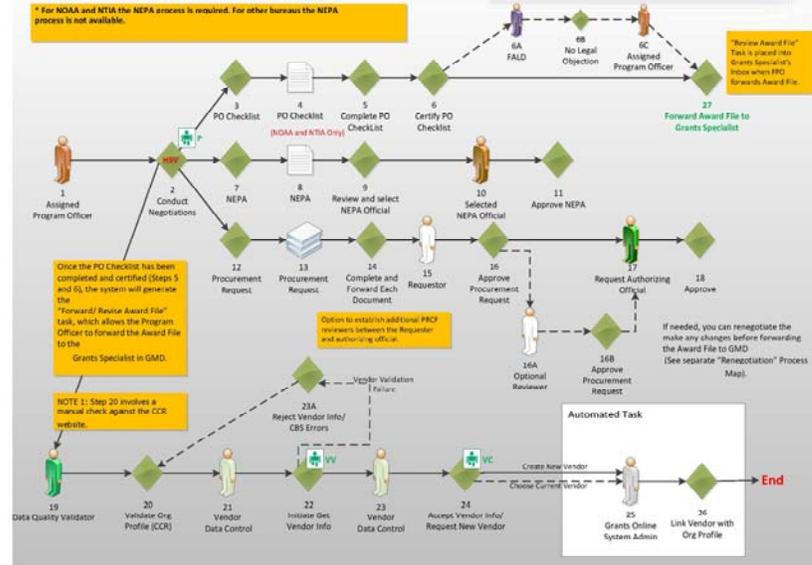


Prepare Applications for Funding Overview (UNI-3)

May 23, 2012

Version 4.09

* For NOAA and NITA the NEPA process is required. For other bureaus the NEPA process is not available.



The screenshot displays the Grants Online interface. At the top right, a workflow diagram shows steps: 1. Assigned Program Officer, 2. Conduct Negotiations, 3. PO Checklist, 7. NEPA, and 12. Procurement Request. Below this is a table with 33 items found, displaying the first two rows:

View	Task Name	Award Number	Task Received Date	Document Type	Project Title	Task Status	Document Id	Task Id	Start Date	Completed Date	Applicant Name	Proposal Number
View	Conduct Negotiations	N/A	02/05/2011	Application	LB Universal2 RFA App	Not Started	2199761	1795527			icmr	LB Univ2 App
View	Modificar Requisitos	N/A	03/06/2011	RFA	N/A	In	3100760	1706635	03/06/2011		N/A	N/A

The main section is the 'Application Submission Type and Date Information' form. A yellow callout box labeled 'Step 1: Org Lookup - Find organization's record in database or add if necessary' points to the 'Org Lookup' button. Below the form is a search results table with 2 items found:

Select	Org ID	Name	Bureau	Address	DUNS	DUNS + EIN	Cage/ASAP	Active
Select	2002469	Institute for Community Managed Resources (ICMR)	NOAA	123 Main Street, Washington, DC 20000 USA	123456789	98765432	12345	true
Select	2002490	Institute for Community Managed Resources (ICMR)	NTIA	123 Main Street, Washington, DC 20001 USA	123456789			true

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- a. When searching for an organization in the Grants Online database use the 9-digit DUNS number alone for the initial search. Do not include the extra DUNS+4 digits in the search field if they are on the application.

Recipient – High Resolution Systems

DUNS – 602201043

- b. It is important to select an organization for your Bureau. If the organization that you would like to use is displayed in the search results but is associated with a different Bureau, you will need to enter a new record for your Bureau.
- c. An additional identifier on the Organization Profile called the “Cage Code*” may be returned in the search results. The Cage Code is a data field from the System for Award Management (SAM). SAM has replaced the Central Contractor Registry (CCR). Cage Codes are NOT displayed in Grants Online for organizations that are set up for ASAP.
- d. Only active records will be returned in the search results. If for some reason an organization is marked as inactive in the Grants Online database it will not show up in the search results even though it may be associated with a current award or closed award. For example, when an organization converts from non-ASAP to ASAP, the non-ASAP record will be made inactive so that it cannot be selected for a new award. If there are any closed awards for that organization before it converts to ASAP, they will remain associated with the non-ASAP record but the active ones will become associated with the ASAP record.
- e. You will be able to tell whether or not an organization is already set up in ASAP by the presence of an ASAP ID in the search results.

Add New Organization

Add Organization

*****PROFESSIONAL ORGANIZATION*****

Description

Organization Type * [not specified -]

Bureau * [not specified -]

Applicant Type [not specified -]

Organization Name * [not specified -]

Identification

DUNS Number [9 digit number] [4 digit number]

EIN Number [xx-xxxxxxx]

MSI Code [not specified -] Search MSI List

CAGE CODE: []

CCR EXPIRATION DATE: []

Please press 'Save' before you add attachments

Save Save and Return to Main Cancel

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When adding a new organization you must now select your Bureau at the top of the page. If you have the organization's CAGE CODE it can be entered at the bottom of the page.

A required checkbox has been added to the PO Checklist so you can indicate if you have verified the EIN and DUNS number that the recipient entered on the submitted application. (See Slide 20) 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.

33 items found, displaying all items. 1

View	Task Name	Award Number	Task Received	Document Type	Project Title	Task Status	Document Id	Task Id	Start Date	Completed Date	Applicant Name	Propose Number
View	Conduct Negotiations	N/A	02/05/2011	Application	LB Universal2 RFA App	Not Started	2199761	1795527			icmr	LB Univ2 App
View	Mobiliz. Recipients	N/A	02/05/2011	RFA	N/A	In	2199760	1795525	02/05/2011		N/A	N/A

Step 2: Authorized Representative Lookup - Find Auth Rep in database

Step 3: Generate or associate award number.

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We are currently working on a new award. However, it is very important when working on continuation amendments to select the exact same organization record that is on the original award. Right now the system does not check to make sure they are the same. If a different organization record is selected it will cause problems with the application processing further along in workflow.

The screenshot displays the Grants Online interface. At the top left, there are logos for NFTA, NFTA GRANTS ONLINE, TRADE, and MBDA. A workflow diagram shows a sequence of steps: 1 Assigned Program Officer, 2 Conduct Negotiations, 3 PO Checklist, 7 NEPA, and 12 Procurement Request. A box labeled 'To Provisional Organization Workflow' is connected to step 2. Below the diagram is a 'Your Tasks' section with a table of tasks. The table has columns for Document Type, Status, Document Number, Task Name, Document Date, Project Title, Task ID, Document/Task ID, Start Date, Completed, and App/Task Name. A red box highlights a task with the text '(NEPA - NOAA, NTIA Only)'. Below the table is a 'Pending Actions' section with a table of actions.

Document Type	Status	Document Number	Task Name	Document Date	Project Title	Task ID	Document/Task ID	Start Date	Completed	App/Task Name
Procurement Request and Commitment of Funds	Not Started	NA1120T9990039	Procurement Request and Commitment of Funds	02/02/2011	Test Training App 1 for Not Release 4.06 Comp RFA Started	2399723	1761340			Institute for Community Managed Resources (ICMR) - 18 Test for App 1
NEPA Document	Not Started	NA1120T9990039	NEPA	02/02/2011	Test Training App 1 for In Release 4.06 Comp RFA Progress	2399724	1761341	02/02/2011		Institute for Community Managed Resources (ICMR) - 18 Test for App 1
Complete PO Checklist	Not Started	NA1120T9990039	PO Checklist	02/02/2011	Test Training App 1 for Not Release 4.06 Comp RFA Started	2399723	1761340			Institute for Community Managed Resources (ICMR) - 18 Test for App 1

In the Universal application process, the Provisional Organization workflow is initiated at the same time as the PO Checklist, NEPA, and Procurement Request when the FPO selects “Negotiations Complete”. However, the Organization Profile task for the Provisional Organization Workflow is not in the FPOs inbox. Rather it is created in the inbox of a new Grants Online user called the Data Quality Validator. The FPO can monitor the progress of the Organization Profile by checking under “Pending Actions” on the Award File launch page.

Until the Provisional Organization workflow is completed, the FPO will not have an option to Certify the PO Checklist and the Budget Officer will not have an option to Approve the Procurement Request.

You now have 3 new tasks in your Inbox. (If not, refresh your task box.) An Award File has also been created in the database. These three tasks will each move along three separate workflow paths but will all end up as a part of the same Award File in the Grants Specialists’ Inbox. They do not have to be completed in any particular order; however, the Grants Specialist will often return an “incomplete” Award File back to the FPO because they cannot complete their work until all three documents are complete in the Award File. Therefore, you should periodically check Workflow History to make sure the Procurement Request and NEPA have completed their approval process before forwarding the Award File to the Grants Specialists. (The task with the option to forward the Award File to the Grants Specialist appears after you complete the PO Checklist.)

We will start with the NEPA Document. Only NOAA gets the NEPA Document. The other bureaus only get the PO Checklist and the Procurement Request.

The screenshot displays the NEPA Grants Online system interface. At the top, a workflow diagram shows steps 25 (NEPA*), 26 (NEPA), 27 (Review and select NEPA official), 28 (Selected NEPA Official), and 29 (Approve NEPA). The main form area includes:

- Attachments:** No attachments. Includes a link to 'Add new Attachment' and a note: 'Any changes to information on this page should be saved before adding or removing attachments. [Save File Guidance](#)'.
- Guidance:** Links to 'NOAA FY 2009 Workshop Presentations - Dept. on 10/12/11' and 'NOAA Guidance - requires NOAA email address and password'.
- a.) Level of Review:** A section for indicating the level of environmental review. It includes radio buttons for:
 - Categorical Exclusion (CE) Memorandum completed and signed by the Responsible Program Manager along with related CE review checklist, as appropriate. [Select/View CE](#)
 - Environmental Assessment (EA) with signed Finding of No Significant Impact and concurrence by NOAA NEPA Coordinator
 - Environmental Impact Statement (EIS) with signed Record of Decision (ROD)
 - Not Required
- b.) Mitigation Measures:** A question: 'If either an EA or EIS was completed, did the analysis of the environmental impacts require the implementation of one or more mitigation measures?' with radio buttons for 'NO' and 'YES'. A link for 'Special Award Condition' is present.
- c.) Post Award NEPA Review Process:** A question: 'Does the proposal include funding for one or more projects that have not yet been identified and therefore NEPA review cannot be completed?' with radio buttons for 'NO' and 'YES'. A link for 'Special Award Condition' is present.
- Routing:** A dropdown menu labeled 'Please Select a NEPA Official for routing purposes:' with a 'Select A NEPA Official' button.
- Buttons:** 'Save', 'Save and Return to Main', and 'Cancel'.

On the right side, there is a 'Categorical Exclusions' table:

CE Category	CE Description
<input checked="" type="checkbox"/> 6.03a.3 (b)	Management plan amendments.
<input type="checkbox"/> 6.03a.3 (b)(1)	Management plan amendment may be categorically excluded from further NEPA analysis and the proposed change has no effect individually or cumulatively on the human environment, and the record with a copy submitted to the NEPA Coordinator, and a brief statement with the record.
<input type="checkbox"/> 6.03a.3 (b)(2)	Minor technical additions, corrections, or changes to a management plan.
<input type="checkbox"/> 6.03b.2	Restoration Actions. The Damage Assessment and Restoration Program policy states that actions that may pose significant impacts on the quality of the human environment, or cumulatively have significant impacts on the human environment (e.g., actions with limited funding).
<input type="checkbox"/> 6.03b.3	Exclusion of Restoration Actions Eligible for a CE

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In the Action Dropdown select “Complete NEPA Document” and submit. You will come to the NEPA Details screen which has 3 questions. After completing those three questions add any appropriate attachments and select the NEPA Official who will be doing the final NEPA approval. For this class select “Internal Reviewer”. After clicking Save and Return to Main select “Forward NEPA Document” from the Action dropdown box and click Submit. You will be returned to your Inbox where you will see that the NEPA Document task is no longer there since it has moved to the next step in workflow. (You can always find old tasks by changing your Inbox filter from “Open” to “Closed.”)

NOTE: For more information regarding the NEPA process view see FPO Training page item #18

The Fiscal Year can be changed by the FPO to use Prior Year Funds

Automatically filled in after Authorizing Official and Requestor have been selected

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Next, select the “Procurement Request” task from the Inbox and then select Complete Procurement Request and Commitment of Funds from the Action dropdown box. Note that this Procurement Request is only for the first year of funding. We will discuss how to fund the out-years during the Post Award class.

Fill in Authorizing Official (Internal Reviewer) and Requestor (NOAA Student – each student should use their own training ID). Select Save.

Now the Requisition Number and Ship To boxes have been filled in by the system. Notice the data in the “Description:” box. If the Procurement Request is done before the PO Checklist, the Grant Type (Grant or Cooperative Agreement) is not available to be filled in. You can fill it in manually if desired.

You also get an error message prompting you to fill out the ACCS lines. Select the “Add New ACCS Lines” link. The “Fiscal Year” will default to the current fiscal year but can be changed by any user with edit rights on this screen. The “Prior Year Fund” indicator is automatically set by the system based on the data in the “Fiscal Year” field.

After entering the ACCS information:

1. Click the Save button.
2. Click the DWValidate button to validate the data against the CBS Data Warehouse tables to pull in the Program Code.
3. Click the Cancel/Done button to return to the previous screen.

The screenshot displays the Grants Online system interface. On the left is a vertical navigation bar with logos for NIFA, GRANTS ONLINE, TRADE, and MBDA. The main content area is divided into three sections:

- Workflow Diagram:** A process flow starting with '12 Procurement Request', '13 Procurement Request', and '14 Complete and Forward Each Document'. A note below states: 'Option to establish additional PRCF reviewers between the Requester and Authorizing Official.' The flow continues to '15 Requestor', '16 Approve Procurement Request', '16A Optional Reviewer', '16B Approve Procurement Request', '17 Request Authorizing Official', and finally '18 Approve'.
- Accounting - ACCS Lines:** A screen showing 'No CD435 ACCS Lines have been defined.' with links for 'Add New ACCS Line'. It displays 'PRCF Total for this Award action: \$0.00' and 'Total Federal funds authorized for this Award action: \$5,000.00'. At the bottom are buttons for 'Save', 'Save and Return to Main', 'CBSValidate', and 'Cancel'. A yellow callout box points to the 'CBSValidate' button, stating: 'There is a "Validate" button on the main Procurement Request screen to do an edit check against the main CBS database. This cannot be used until after the ACCS line(s) have been added.'
- CBS Result:** A screen displaying validation errors: 'Vendor Validation ; SI.No 1; VendNo 90600; VendId 1; Tin 205533272; Duns 602201043; Active Y; Item_No 001; Line_No 1; CD435_ACCS_ID 2025511; Error - Org 4 0; Invalid or inactive Org 4 Code; Item_No 001; Line_No 1; CD435_ACCS_ID 2025511; Error - Can not find the mask in FM001 -13-14-SAE0000-10-01-0005-00-00-00-0041-11-00-00;'. A 'Cancel' button is at the bottom. A yellow callout box explains: 'If there is a problem with the edit check against CBS the system will display a separate page showing a message from the CBS system. If the CBS Result messages is difficult to understand contact the Grants Online Help Desk for assistance. In this example one component of the org code is incorrect.'

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There is a “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. (Note: The CBS validation is only required on the Budget Officer task, but is available for the FPO and Requester.)

The amount in “PRCF Total for this Award action” must be equal to or less than the amount in “Total Federal funds authorized for this Award action.” If you need to create more than one Procurement Request to send through different approval routes, you can select “Create New Procurement Request” at this time. (The funding total of the Procurement Requests together must be equal to or less than the Total federal funds authorized for this Award action.) Otherwise, select Save and Return to Main to get it ready to start workflow. You will be returned to the Procurement Request launch page. In the Action dropdown box select Forward Procurement Request to Requestor to begin workflow. Since you have selected yourself as the requestor you will have a new task in your Inbox to Review the Procurement Request. Go to the Inbox – Tasks and select that task, then select Approve Procurement Request from the dropdown box.

21 PO Checklist → 22 PO Checklist → 23 Complete PO Checklist → 24 Certify PO Checklist → 24a Award File → 39 Forward Award File to Grants Specialist

PO Checklist - NA11GOT9990039

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

General Award Information
Application Organization: [Institute for Community Managed Resources \(ICMR\)](#)
Grant Type: Grant Cooperative Agreement
If Cooperative Agreement, enter [Cooperative Agreement Special Award Condition](#)

Statutory Authority: [Guidance](#) Audit Trail: [Last](#)

a. Federal Amount	b. Required Non-Federal Share Amount	c. Required Cost Share % of Total (Federal + Non-Fed)	d. Funding Source / Required Cost Share Explanation	Action
\$500,000.00	\$0.00	0.0	Source or Explanation of 0% Required Cost Share: None Required	Full Edit
Add New				

Project Description/Abstract: [Guidance](#)

Matching Requirements: [Guidance](#)

Registered Federal Share:	\$500,000.00
Total Federal Share (from Matching Requirements):	\$500,000.00
Registered Non-Federal Share:	\$0.00
Total Required Non-Federal Share:	\$0.00
Voluntary Non-Federal Share:	\$0.00

Minority Serving Institution:
Does this award include any subaward to a Minority Serving Institution? MSI Coordinator:
 NO YES

Homeland Security Presidential Directive - 12:
Does the proposed award require any recipient, subawardee, and/or contractor personnel to have physical access to Federal premises for more than 180 days or to access a Federal information system? NO YES

Research Terms & Conditions Prior Approval and Other Requirements: [Guidance](#)
Does the applicant follow 15 CFR Part 14 (CFR Circular A-115), Future 2 CFR (213), and will the funding for the proposed award, or any part of the proposed award, be used to conduct research? NO YES @ Not Answered

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You now have one last task in your Inbox to complete your work on this application: Complete PO Checklist. Click on that task and go to the details page using the action dropdown box. Fill out this form carefully. Each section is important.

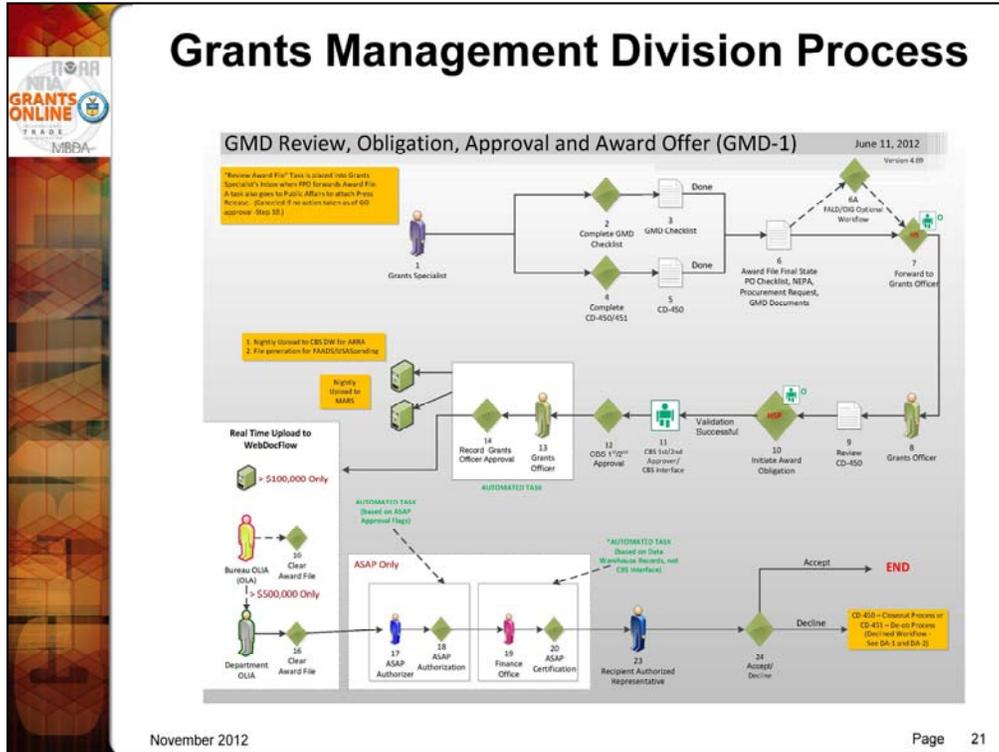
Statutory Authority – Something must be entered. Can be changed by GMD, but NOAA policy is that this is the responsibility of the FPO.

Project Description/Abstract – Do not use abbreviations. This is the information that is used for congressional notifications and for press releases.

Matching Requirements –

- a. If using ratio, remember that the number on the left of the colon plus the number on the right of the colon equals to the total number of even parts. (Ex: 1:4 ratio means that the award total is divided into 5 equal parts with the recipient contributing a match of 1 part for every 4 parts of federal share. In real numbers for a \$500,000 total award this would be \$100,000 in matching funds to \$400,000 in federal funds.
- b. If using percentage, the percentage is based on the total award (fed plus match), not a percentage of just the federal funds. (Ex. A 20% match means that the total award contains 80% federal funds plus 20% matching funds. In real numbers for a \$500,000 total award this would be \$100,000 in matching funds (20% of \$500,000) to \$400,000 in federal funds (80% of \$500,000).

The correct “**Special Award Conditions**” links must be used in order for Grants Online to associate the condition with that item in the PO Checklist. The Special Award Conditions at the bottom of the page should be used only for additional programmatic special award conditions not covered elsewhere on the page.



Once the Award File has been forwarded to the Grants Management Division (GMD) there are several additional steps that take place before the award offer actually gets to the recipient. GMD has 60 days to complete their review and approval process.

If funds have been removed from the ASAP accounts used on the Procurement Request after the award file was sent to GMD, the Grants Officer will not be able to approve the award and will return it to the Program Office to remedy the situation.

If the recipient organization record attached to the application is not marked as ASAP, the ASAP steps on this workflow will be skipped and the recipient will have to use an Organization Profile Change Request to initiate their ASAP enrollment after the award has been accepted. This process must still take place even if a “Non-ASAP” organization was accidentally associated with the application instead of the ASAP record for that organization.

Please note that for Non-NOAA Bureaus using Grants Online, all awards are routed to WebDocFlow for OLIA clearance regardless of the award amount.

From: GrantsOnLine.test@noaa.gov (GrantsOnLine.test@noaa.gov)
To: grant.recipient@yahoo.com
Date: Monday, December 10, 2007 8:54:40 AM
Subject: Notice of NOAA posting of Application Package at Grants.gov

This is an automated notification from NOAA Grants Online that an application package has been posted at [Grants.gov](http://www.grants.gov) and you have been selected by the posting Program Officer for notification.

[Grants.gov](http://www.grants.gov) is available at the URL: <http://www.grants.gov>. If you are not registered at [Grants.gov](http://www.grants.gov), please begin the registration process immediately. It can take up to 2 weeks to fulfill all of the registration requirements.

To retrieve your application package from the [Grants.gov](http://www.grants.gov) home page:

- 1) Click the "Apply for Grants" link in the upper left (under "For Applicants"). Review the instructions and download/install the PureEdge forms program if you have not already done so.
- 2) Click the "Download a Grant Application Package and Instructions" link.
- 3) Enter the following Funding Opportunity Number:
SEC-ONPO-2008-2001279
- 4) Click the Download Package button.
- 5) Click the "download" link under the Instructions & Application column.
- 6) Click the download links for the instructions and the application package.
- 7) Fill out the application and follow the [Grants.gov](http://www.grants.gov) instructions for submission.

Information on the NOAA Request for Applications (RFA):

RFA Name: Generating Sample Notifications
Fiscal Year: 2008
CFDA Number: 11.469
Opportunity SEC-ONPO-2008-2001279
Number:
Agency: National Oceanic and Atmospheric Administration
Opening Date: 2007-12-10 08:54:01.0
Program Office: USEC One NOAA Program Office (ONPO)
Program Officer: Program Officer
Closing Date: 2008-09-30 17:30:00.0- NOTE: This is the latest due

date for all applications in this RFA. Please contact the NOAA Program Officer for verification of when your specific application must be submitted for timely award processing.

For further information contact:

Name: Program Officer

Phone: 301-555-1212

Address: 14th Street & Constitution Avenue, NW Washington, DC 20230

Email: federal.program.officer@noaa.gov

Federal Program Officer Training Agenda

Day 2 - All Day

Session 3: Competitive RFA Creation/ Application Processing 8:00 am – 4:30 pm	
Topic	Duration
Introduction and Agenda	8:00 – 8:15 (15 min)
Online Demonstration and Hands-On Exercise with Process Maps: Creating a Competitive RFA	8:15 – 12:00 (3 hours and 45 min with 2 breaks)
Lunch Break	12:00 – 1:00 (1 hour)
Online Demonstration and Hands-On Exercise with Process Maps: Processing Applications for a Competitive RFA	1:00 – 4:15 (3 hours and 15 min with 2 breaks)
Additional Resources and Training Questions and Comments Evaluations	4:15 – 4:30 (15 min)

Objectives – By the end of this class students should:

- Understand the difference between a Competitive RFA and a Universal RFA (previously called “Non-Competitive”)
- Understand the difference between the Certified and Un-Certified FPO/Program Office Staff roles
- Be able to create a Competitive RFA and route documents for publication
- Be able to input a paper application and complete the “Review Minimum Requirements” task
- Understand the Competition Manager and Selection Official functions in the Competitive RFA workflow
- Be able to Conduct Negotiations and prepare an Award File for GMD review
- Understand the Award File approval and acceptance process
- Understand where to find additional help when needed

Training Materials:

1. Agenda and Objectives
2. Student Screen Shots with Process Maps
3. Course Evaluation

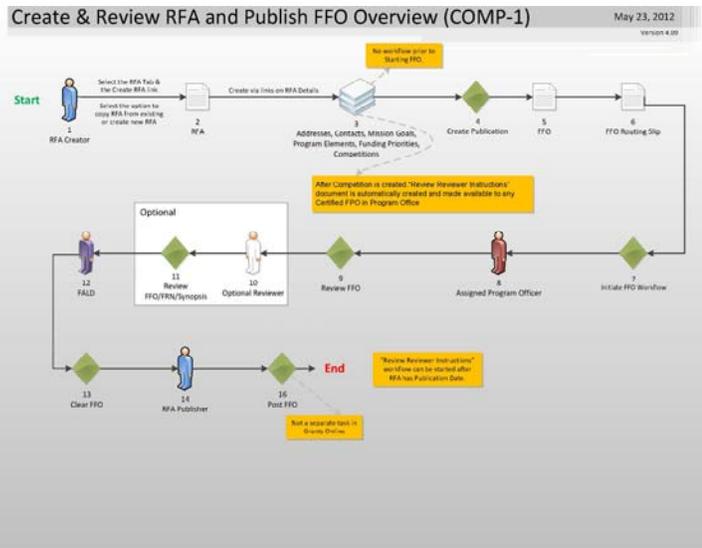


**Grants Online Training
Student Screen Shots
Competitive RFA
and
Application Processing**

November 2012



Competitive Process – RFA Creation





Universal and Competitive RFA Fields Posted to Grants.gov

- Opportunity Number – **Federal Opportunity Number**
- Opportunity Title – **RFA Name**
- Opportunity Category - (**"Discretionary"** for Competitive RFA, **"Other"** for Universal RFA)
- Category Explanation (if opportunity category is "Other"): **RFA Type**
- **CFDA Number**
- Posting Date – **Publication Date**
- Close Date – **Application Due Date**
- Close Date Explanation - (**AS NEEDED**)
- Agency Contact – **RFA Publisher** (*Person listed as contact for users having difficulty downloading the application forms*)
- Email Address – (*Email address of Agency Contact*)
- Open Date – (*Most of the time, same as Posting Date*)
- Application Package – **Forms listed on Application Package Details screen**
- Application Instructions – **File attached to Application Package Details screen, or generic instructions if no file was attached.**

Notes:

1. Assigned Program Officer on the RFA needs to be a "Certified FPO" in order to forward the documents through workflow.
2. For both *Universal* and *Competitive* RFAs you will need to establish the person or persons in your program office who will receive the applications for their initial minimum requirements check .



Additional RFA Fields Posted to Grants.gov for Competitive Announcements

- Eligible Applicants – *FFO Details screen, Section III. A.*
- Cost-Sharing or Matching Requirement – *“Yes” or “No” based on FFO Details screen, Section III. B.*
- Expected Number of Awards - *Anticipated Number of Awards (Min)*
- Estimated Total Program Funding – *Anticipated Funding Amount*
- Award Ceiling – *Anticipated Award Amount (Min)*
- Award Floor – *Anticipated Award Amount (Max)*
- Funding Opportunity Description - *FFO Details screen, Executive Summary, Funding Opportunity Description*
- Competition ID – *System Generated ID for the Competition(s) associated with the RFA*
- Competition Title – *Competition Details screen, Competition Name*

All RFA workflow processes fall under two main categories – “Competitive” and “Universal”. All of the sub-categories listed on the “Create RFA” screen with the exception of “Competitive” follow the “Universal” workflow process. For this class select “Competitive” as the RFA type and “Create New from Scratch” as the Action.

On the next screen enter the RFA Name and Fiscal year. For class the RFA name should include your training userid. This will make it easier to find in future searches. You may also want to add today’s date in the name of the RFA. ***For purposes of class set Anticipated Publication Date to tomorrow’s date.***

Select the OCPO Program Office and your training user as the Assigned Program Officer. Select the only available CFDA Number. Click Save.

Note: Funding Opportunity Number has now been generated.

There is a pattern to this number:

First section – Bureau (for training - “NOAA”)

Next section - Line Office (for training - “GOT”) ***** In those organizations in which the Bureau and Line office are the same, the Line Office is not included.***

Next section – Program Office (for training – “OCPO”)

Next 4 characters – the Fiscal Year

Last 7 characters – system generated number

The screenshot shows the Grants Online RFA Creator interface. On the left is a vertical banner with logos for NIFA, GRANTS ONLINE, and MBDA. The main content area is divided into two parts. The top part features a workflow diagram with six steps: 1. Select the RFA Tab & the Create RFA link; 2. Select the option to copy RFA, insert existing or create new RFA; 3. Create via links on RFA Details (Addresses, Contacts, Mission Goals, Program Elements/Funding Priorities, Competitions); 4. Create Publication; 5. FFO/FRN; 6. FFO/FRN Routing Slip. The bottom part shows the 'RFA Supplementary Information' form with fields for 'Anticipated Funding Amount', 'New Program' (with radio buttons for 'NOT' and 'IS' a new program), 'Anticipated Award Amount', and 'Anticipated Number of Awards'. Below these are sections for 'Selected Federal Addresses', 'Selected Federal Contacts', 'Selected Mission Goals', 'Program Elements/Funding Priorities', and 'Competitions'. A 'Search Addresses' form is overlaid on the right, with fields for 'Program Office Name', 'Street Address', 'City', 'State', and 'Zip', and a 'Search' button. The search results section shows 'Nothing found to display' and an 'Add to RFA' button. The 'Selected Addresses for this RFA' section also shows 'Nothing found to display' and a 'Remove from RFA' button. A pink callout box contains the text: 'May change on future release. For now always select top radio button to indicate FRN is NOT required.' The page footer includes 'November 2012' and 'Page 6'.

As of April FY 2011 – FRNs are no longer required for any Grant Programs. Always click on 1st radio button.

The Anticipated Award Amounts and Anticipated Number of Awards are not mandatory fields in Grants Online but are important for Grants Planning purposes and they are data fields that are posted at Grants.gov.

Start

- Select the RFA Tab & the Create RFA link
- Select the option to copy RFA from existing or create new RFA
- Create via links on RFA Details
Addresses, Contacts, Mission Goals, Program Elements/Funding Priorities, Competitions
- Create Publication
- FFO/FRN
- FFO/FRN Routing Slip

Selected Addresses - No addresses have been selected. [Add New](#)

Selected Contacts - No contacts have been selected. [Add New](#)

Selected Mission Goals - No mission goals have been selected. [Add New](#)

Program Elements/Funding Priorities - No Program Elements/Funding Priorities Available. [Add New](#)

Competitions - Press Save before selecting the following link(s). No Competition. [Add New](#)

Add Program Element/Funding Priority

Label: e.g. I, A, 1., 1), 1.a.

Name: * Note: Reports and screen listings will use the label if entered. Otherwise, the name will be used.

Description:

45 / 4000

Program Element/Funding Priorities

Order	Label	Name	Description	Edit	Delete
1	A	First Program Element/Funding Priority	Description of Program Eleme	Edit	Delete
2	B	Second Program Element/Funding Priority	Description of Program Eleme	Edit	Delete

[Add New](#)

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Program Elements can be given custom labels. Applications that will later be associated with this RFA can be linked to one (and only one) of the Program Elements defined at this step.

Before adding details for the Competition be sure to save the data entered thus far on the RFA.

The screenshot displays the Grants Online interface for creating a competition. At the top, a workflow diagram shows six steps: 1. Select the RFA Tab & the Create RFA link; 2. Select the option to copy RFA from existing or create new RFA; 3. Create via links on RFA Details (Addresses, Contacts, Mission Goals, Program Elements/Funding Priorities, Competitions); 4. Create Publication; 5. FFO/FRN; and 6. FFO/FRN Routing Slip. Below the diagram, a form is shown with the following fields: Competition Name (Sample Competitive RFA for FPO Training), Fiscal Year (2009), Competition Type (Group selected), Assigned Program Office (GOT One NOAA Program Office (ONPO)), and Competition Manager (NOAA Student). A 'Save' button is visible. Below this, another form shows details for a competition: Competition Name (Comp RFA for Feb 2011 Training Screen Shots), Fiscal Year (2011), Competition Type (Group selected), Assigned Program Office (GOT One Commerce Program Office (CPO)), Competition Manager (Grants Student), and Selecting Official (-Select a Selecting Official-). Fields for Anticipated Federal Funding, Required Federal Funding, and Cost Share are present. An 'Anticipated Competition Schedule' section includes Pre-Application and Application due dates with time and time zone options. A 'View Anticipated Competition Schedule' button is at the bottom. To the right, a 'Minimum Requirements' table lists seven requirements: 1. Eligible Applicant, 2. Application Received by Deadline, 3. Application Meets Minimum Federal Funding, 4. Application Meets Maximum Federal Funding, 5. Application Meets Minimum Match, 6. Application Meets Maximum Match, and 7. Complete Application. Below this is a 'Special Award Conditions' section with a 'NOTE: Review Events are required for the Competitive Process but can be done outside of Grants Online.' and a 'Review Events' section with a 'NOTE: No Review Events available.' Buttons for 'Save', 'Save and Return to Main', and 'Cancel' are at the bottom right. The page number '8' is in the bottom right corner.

The RFA name is repeated as the Competition name, make changes as appropriate. Enter the Fiscal Year. (There can be competitions for more than one fiscal year in a single RFA.) In most cases you will select **Group** for Competition Type. (See explanation of Competition Types below.)

Group – All applications are due at the same time and evaluated against each other.

Individual Qualification – Applications are typically due over the course of a fiscal year and only need to meet or exceed an absolute standard to be funded.

Remember to **Save** often.

You now have a page to add additional details for this Competition. Fill in the blue boxes.

1. Select “Internal Reviewer” for the Selecting Official.
2. Under “Anticipated Competition Schedule” the Application Due date can be set as a hard date or a “relative” date based on the actual publication date. This is usually set based on how close the application due date is to the anticipated posting date to Grants.gov.
3. Select View Anticipated Competition Schedule to see the system calculated dates.

NOTE: The user who receives a routed application becomes the “Assigned Program Officer” on that application and will get the tasks to “Conduct Negotiations” as well as the three Award File tasks for the PO Checklist, Procurement Request, and NEPA Document. If the user who receives a routed application is NOT a Certified FPO, the application will have to be reassigned to a Certified FPO for PO Checklist certification.

Click the “Save” button at the bottom of the screen before moving on to the next sections.

The screenshot displays a workflow for creating a Review Event. The process starts with selecting an RFA, then creating a publication, and finally generating FFO/FRN routing slips. A callout box highlights the 'Create via links on RFA Details' step, which includes fields for Addresses, Contacts, Mission Goals, Program Elements/Funding Priorities, and Competitions.

The main form is titled 'Independent Individual Merit Review' and includes the following fields:

- Review Event Name: Review Event 1 - Merit Review
- Review Event Manager: [Dropdown]
- Review Done By: Reviews assigned and completed using Grants Online. Reviews assigned and completed outside of Grants Online.
- Scored Criteria: Applications will not be scored. Quantitative - Percent. Quantitative - Points. Qualitative.
- Summary Score Determination: N/A if an stud. Yes.
- Not Scored Criteria: Yes. No.
- Bonus Points: Yes. No.
- Anticipated Review Start Date: 04/28/2011. Anticipated Review End Date: 04/28/2011.

The 'Points Scoring Criteria' table is as follows:

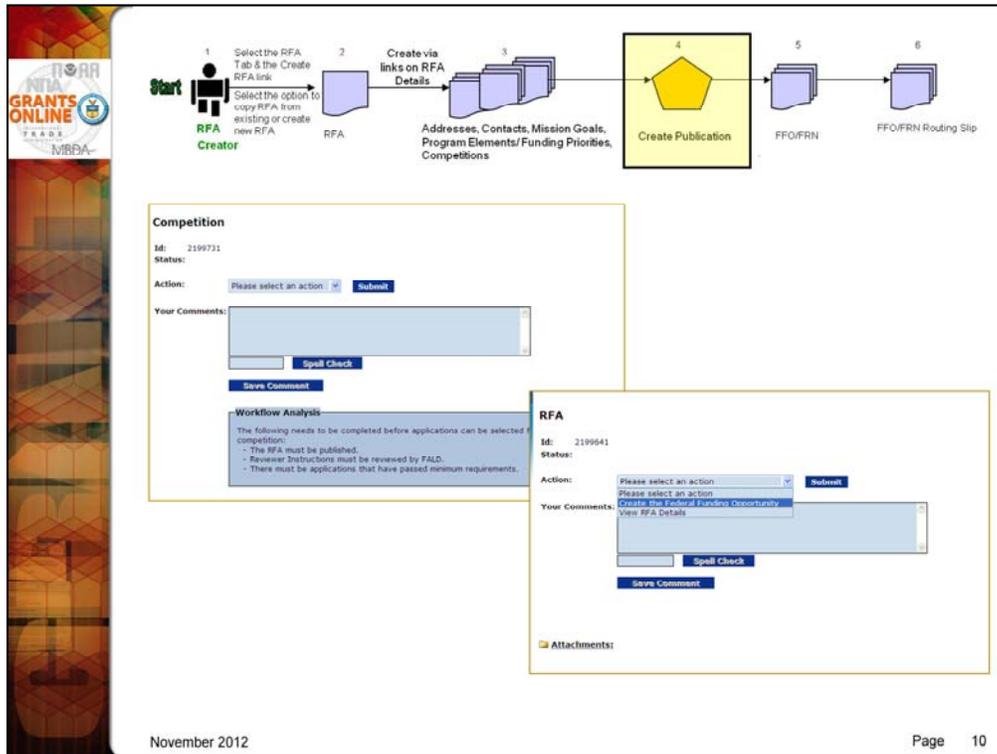
Name	Reviewer Comments	Reviewer Score	Minimum Score	Maximum Score	Action	Action
Technical/Scientific Merit	Required	Required	0.0	40.0	edit	delete
Importance/Relevance and Applicability of Proposal to the Program Goals	Required	Required	0.0	20.0	edit	delete
Overall Qualification of Applicant	Required	Required	0.0	15.0	edit	delete
Project Costs	Required	Required	0.0	15.0	edit	delete
Outreach and Education	Required	Required	0.0	10.0	edit	delete

Buttons at the bottom: Save, Save and Return to Main, Cancel.

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This is the point at which you will need to know some basic information regarding your Review Event(s). These details should reflect the information that is posted in the FFO regarding evaluation criteria and, for the most part, should not be changed after the FFO has been posted. The Review Event start and end dates can be modified as needed.

When you select “Save and Return to Main” you will go to the launch page for this new Review Event (not back to the Competition Details page where you came from.)



From the Review Event Launch Page navigate back to the Competition to check it out for completeness, then navigate to the RFA to begin creation of the FFO.

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Data previously entered in other parts of the RFA will not carry over to these fields in order to force the user to format the paragraphs correctly for publication. For the same reason, if the “Create New from Existing” option was used to create this RFA, the publications fields will still be blanked out.

No formatting (bold, italics, underline, etc.) is available at this time for FFOs due to the historical link to a corresponding Federal Register Notice.

To have both windows open on one screen right click on the “guidance documents” link and open in a new window. Resize the windows so you can have the FFO screen and guidance screen side-by-side. Use the samples from the guidance document to quickly fill in the links for the FFO. You will need to customize the sample for your own Opportunity notice. You can use the “Preceding” and “Subsequent” links to move through the guidance pages.

Note: When creating a new RFA from an existing one, you could open a second window with a *plain text version* of the old FFO and copy and paste the data into the new RFA one field at a time, making appropriate changes as you go along.

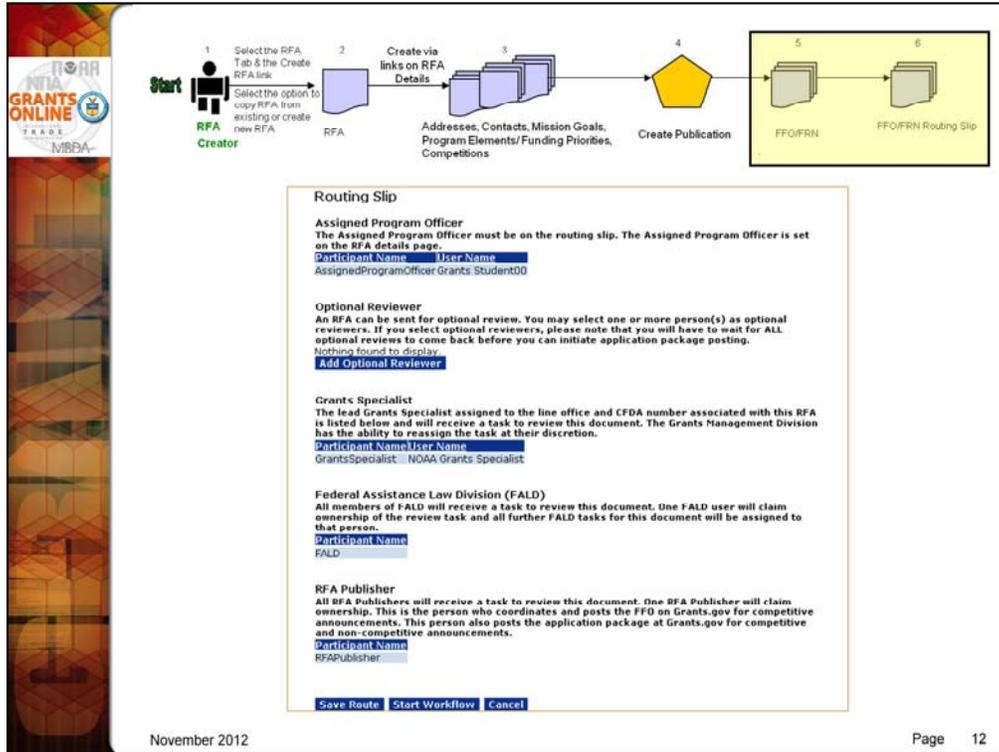
For any place where you have a “soft” date based on the publication date of the Federal Register Notice you should use the phrase <INSERT DATE 45 DAYS AFTER PUBLICATION> (or the appropriate number of days based on your RFA).

NMFS NOTE:

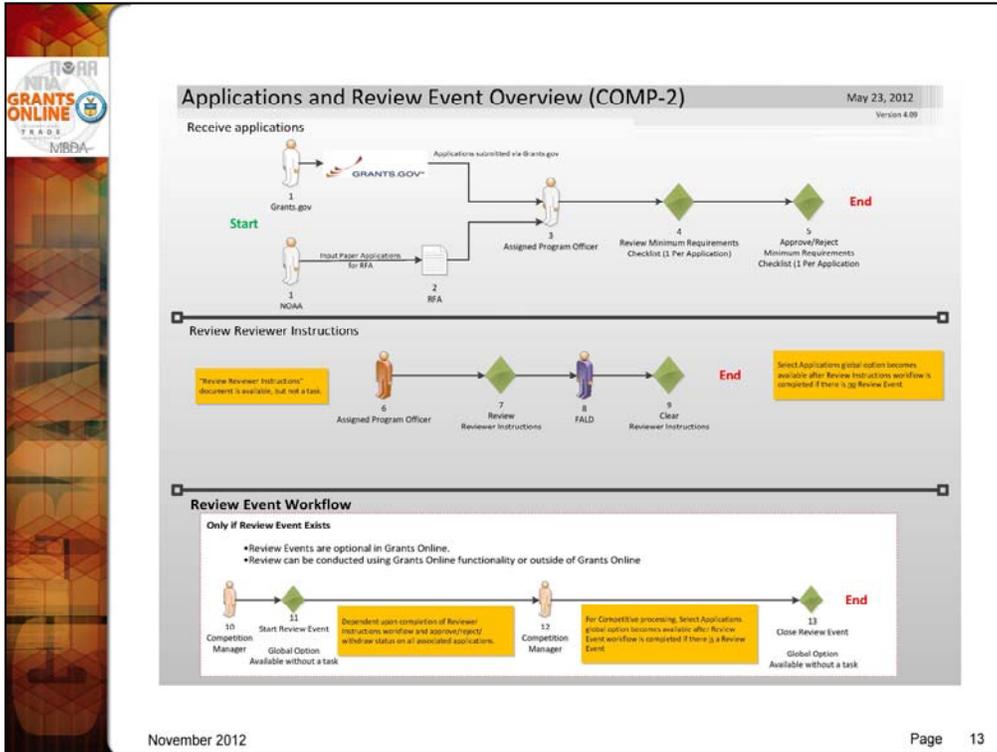
NMFS requires a funding statement under *Funding Availability* that states: "Actual funding availability for this program is contingent upon Fiscal Year 20XX Congressional appropriations"

Do not *indent* the first paragraph of any section. The system will do that for you. Subsequent paragraphs in the FFO for any one section should be indented.

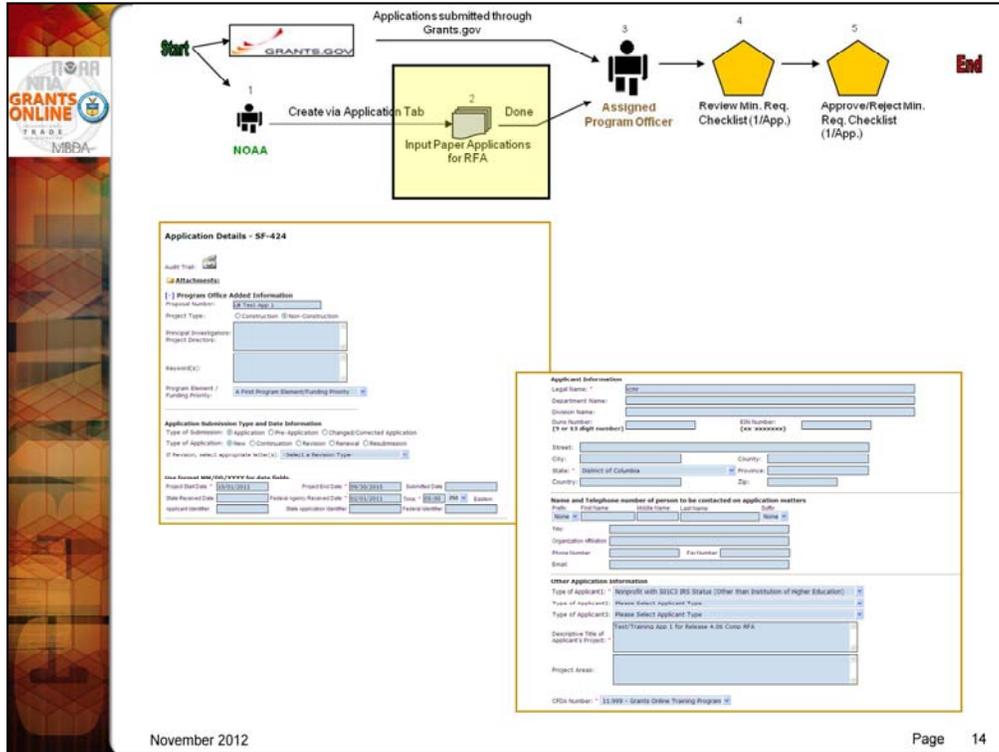
Notice that as you enter data into the various sections of the outline the “(empty)” tag becomes a check mark. This is simply an indicator that you have entered data into that section. You may still return to that section and edit as needed. If all data is removed the “(empty)” tag will be displayed.



The only customizable part of the FFO Routing slip is the section for Optional Reviewers. The Assigned Program Officer is from the RFA details. The Grants Specialist is the current lead Grants Specialist in GMD for your Line Office and CFDA number. When the FFO goes to FALD and to the RFA Publisher, all users with those roles for your agency will receive a task. The first user to take an action on the task will then become the owner and it will be cleared from the inboxes of the other users.



We will use the sample application in the training package for the data entry.



To start, select the “Input Paper Applications” menu item under the Applications tab. The data on the Application Details screen will already be filled in if the application comes in from Grants.gov. However, if a paper application is received by the Program Office the data must be entered on this screen. Only the required fields marked with an asterisk are required for the application processing to continue.

The Application Details screen contains most of the fields found on an SF-424. After entering required fields click “Save as Draft”. If you have missed any required fields you will get an error message with guidance regarding the missing fields.

Be sure to include your student userid (GSTUDENTxx\$) in the Project Title for easier identification later in the process.

The screenshot shows a workflow for submitting applications through Grants.gov. The process starts with 'NOAA' and involves 'Create via Application Tab', 'Input Paper Applications for RFA', 'Assigned Program Officer', 'Review Min. Req. Checklist (1/App.)', and 'Approve/Reject Min. Req. Checklist (1/App.)'. Below the flow is a form for 'Application Funding Details' with fields for 'Total Funding', 'Fiscal Year', 'Funding Start Date', and 'Funding End Date'. A table below the form shows funding details for the year 2011.

Application Funding Details

Application Total Funding : 500000
 Fiscal Year : 2011
 Funding Start Date : 10/01/2011
 Funding End Date : 09/30/2015
 Federal Funding : 500,000.00
 Applicant Funding :
 State Funding :
 Local Funding :
 Other Funding :
 Total Funding : 500,000.00

Fiscal Year	Start Date	End Date	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2011	10/01/2011	09/30/2015	\$500,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500,000.00	\$0.00	Edit	Delete

The “Total Funding” amount includes both Federal and matching amounts.

Hint – After entering the “Total Funding” at the bottom of the screen, click on the “Save as Draft” button. You will get an error message, letting you know that you still need to enter the Application Funding Details; however, when you click on “Add New” the Funding Start and End Dates will be pre-filled from project dates on the main page. The dates do not pre-fill unless you click the “Save as Draft” button before the “Add New” button.

Applications submitted through Grants.gov

Start → 1 NOAA → 2 Done → 3 Assigned Program Officer → 4 Review Min. Req. Checklist (1/App.) → 5 Approve/Reject Min. Req. Checklist (1/App.) → End

Your Tasks

Document Type: All | Status: Open | Apply Filter >>

30 items found, displaying all items 1

View	Task Name	Award Number	Task Received Date	Document Type	Project Title	Task Status	Document Id	Task Id	Start Date	Completed Date	Applicant Name	Propos Number
Review	Review Min. Req. Checklist	N/A	02/01/2011	Application	Test/Training App 1 for Not Release 4.05 Comp RFA Started	In	2199712	1795297			icmr	LB Test App 1
Assign	Assign Award	N/A	01/04/2011	Application	Test App for 4.05	In	2199526	1794572	01/25/2011		Institute	LB - Te

Minimum Requirements Checklist

Minimum Requirement	Yes/No/Not Applicable	Comment
Is the applicant eligible to apply for this RFA based on the applicant type?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/>
Was the application submitted by the deadline date and time?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/>
Does the application request at least the minimum Federal funding required by the RFA?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/>
Does the application request no more than the maximum Federal funding required by the RFA?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/>
Does the non-Federal funding provide at least the minimum match percentage of the total funding?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/>

Other checklist items:

- Does the non-Federal funding provide at no more than the maximum match percentage of the total funding? Yes No Not Applicable
- Does the application contain all of the required forms? Yes No Not Applicable

Overall Comments:

All requirements questions must be answered before the application can be approved or rejected for minimum requirements.

Buttons: Save, Save and Return to Main, Cancel

November 2012 Page 16

If the “No” radio button is selected on any of the items of a Minimum Requirements Checklist, a comment should be entered in the associated comments box or in the General Comments box at the bottom. Currently, if no comment has been entered for a “No” radio button the user will not have an option to Approve or Reject the Minimum Requirement Checklist. In a future release the user will not be allowed to save the screen without a comment if a “No” radio button has been selected.

Sub Documents

Type	ID	Title	Status
Applications Report	2199731	Applications Report	
Selected Applications	2199731	Selected Applications	
Reviewer Instructions	2199732	Reviewer Instructions	

Export options: [Excel](#)

Reviewer Instructions

Attachments:

Name	Short Description	Created Date	Internal Use Only	FALD Reviewed	Logistical	Remove
Text_Attached_1.pdf	Text File 1	02/01/2011 07:24:23 PM	No	No	No	Remove

Add new Attachment: [...]
Any changes to information on this page should be saved before adding or removing attachments.

Logistical Reviewer Instructions

Attachments:

Name	Short Description	Created Date	Internal Use Only	FALD Reviewed	Logistical	Remove
Text_Attached_2.doc	Text File 2 - Logistical	02/01/2011 07:26:58 PM	No	No	Yes	Remove

Add new Attachment: [...]
Any changes to information on this page should be saved before adding or removing attachments.

Note: The Logistical Reviewer Instructions may only be used for attaching instructions related to travel and meeting dates, times and locations, as well as meeting requirements and reimbursement instructions. DO NOT attach any instructions on how to how to conduct the review, review priorities, etc. The Logistical Reviewer instructions do not require FALD review.

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Before starting the Review Event, the Reviewer Instructions must be reviewed by FALD. The FPO does not have a task to start the Reviewer Instructions workflow. It is started by navigating to the Competition launch page and clicking on the ID link for Reviewer Instructions under the Sub Documents section.

There are two sections to the Reviewer Instructions details page. Only the top section is mandatory. An attachment must be added before workflow can be started.

The bottom section is not for FALD. The Logistical instructions are only for the reviewers. This section is used mostly to provide instructions to panel reviewers regarding the logistics involved with convening the panel to review the proposals.

The screenshot displays the NFTA Grants Online interface. At the top, two workflow diagrams illustrate the process:

- Diagram 1 (Yellow):** Shows a 'Competition Manager' role starting a 'Start Review Event' task. A note indicates this is a global option available without a task, dependent on the completion of reviewer instructions and approval of application status.
- Diagram 2 (Red):** Shows a 'Competition Manager' role performing a 'Close Review Event' task, which leads to 'End'. A note indicates this is a global option available without a task, where the global option becomes available after the review workflow is completed.

Below the diagrams are two task interfaces:

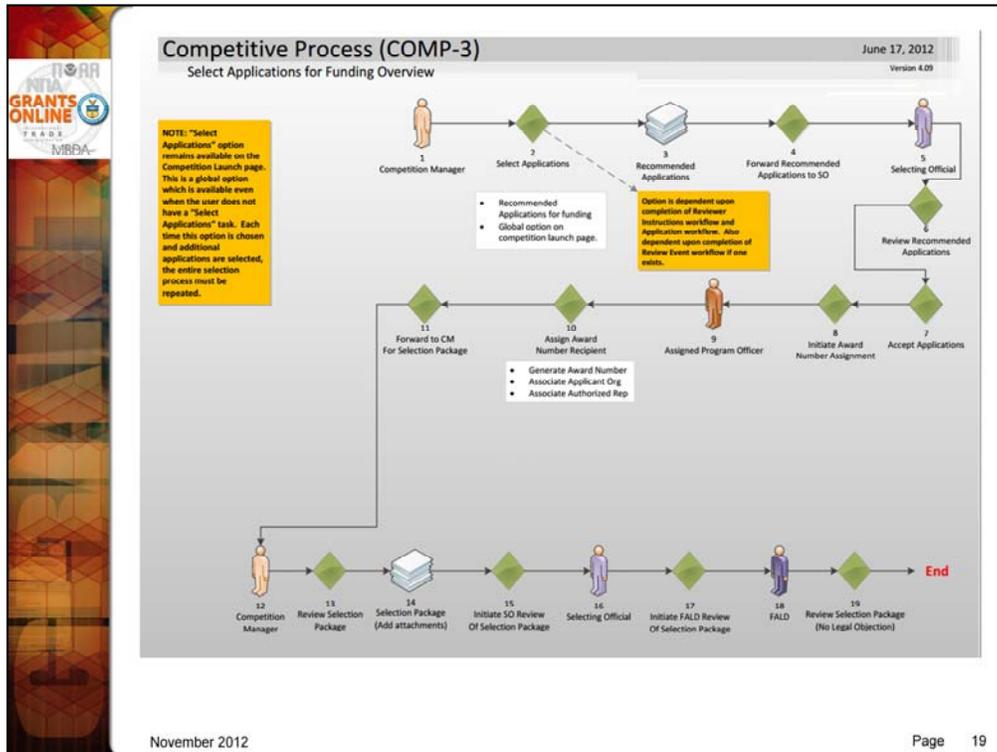
Task 1: Independent Individual Merit Review
 Id: 2253410
 Status: [Blank]
 Action: Please select an action [Submit]
 Your Comments: Please select an action, Start Review Event, View Review Event Details [Spell Check] [Save Comment]

Task 2: Manage Review Event
 Id: 2253411
 Status: ManageReviewEvent - Not Started
 Action: Close Review Event [Submit]
 Your Comments: Please select an action, Assign Applications To Review Event, Assign Reviewers To Applications, Close Review Event, View Review Event Details, View Review Event Summary [Spell Check] [Save Comment]

November 2012 Page 18

To start the Review Event there is no task in the Inbox, so the *Competition Manager* will have to navigate to the Review Event Launch Page from the Sub Documents section of the Competition Launch Page. There will be an Action dropdown option to Start the Review Event. This option will only be available if the Reviewer Instructions task has been completed by FALD.

When the Review Event has been started by the Competition Manager a “Manage Review Event” task goes to the *Review Event Manager*. The Review Event functionality will be demonstrated during the Open Forum session on Wednesday afternoon.



In class the Select Applications Workflow will be demonstrated using the Instructor's RFA. Students will have tasks at Steps 9-11 to assign award numbers to the applications. This step is functionally the same as the "Conduct Negotiations" step of the Universal Application Processing workflow.

The screenshot displays the Grants Online interface. At the top, a workflow diagram shows a Competition Manager (12) forwarding a selection package to an Assigned Program Officer (9) to assign award numbers. Below this, a task list shows a task 'Assign Award Number/Recipient' with a status of 'Progress'. The main form is for 'Application Submission Type and Date Information', with a 'Step 1: Org Lookup - Find organization's record in database or add if necessary' callout. The 'Select Organization' section shows a search for 'ICMR' with results for 'Institute for Community Managed Resources (ICMR)'.

View	Task Name	Award Number	Task Received Date	Document Type	Project Title	Task Status	Document ID	Task ID	Start Date	Completed Date	Applicant Name	Proposal Number
Select	Assign Award Number/Recipient	N/A	02/02/2011	Application	Test/Training App 1 for Not Release 4.00 Comp RFA Started	Progress	2199712	1795321			ICMR	LB Test App 1
Select	Assign Award Number/Recipient	N/A	01/04/2011	Application	Test App for 1.00 Process Maps	Progress	2199706	1795325			Institute for App 1	LB Test for App 1

Select	Org ID	Name	Address	DUNS	DUNS + EIN	Cage/ASAP	Active
Select	2002469	Institute for Community Managed Resources (ICMR)	NOAA 123 Main Street, Washington, DC 20000 USA	123456789	98765432	12345	true
Select	2002490	Institute for Community Managed Resources (ICMR)	NTIA 123 Main Street, Washington, DC 20001 USA	123456789			true

The “Assign Award Number/Recipient” task is now with each Assigned Program Officer.

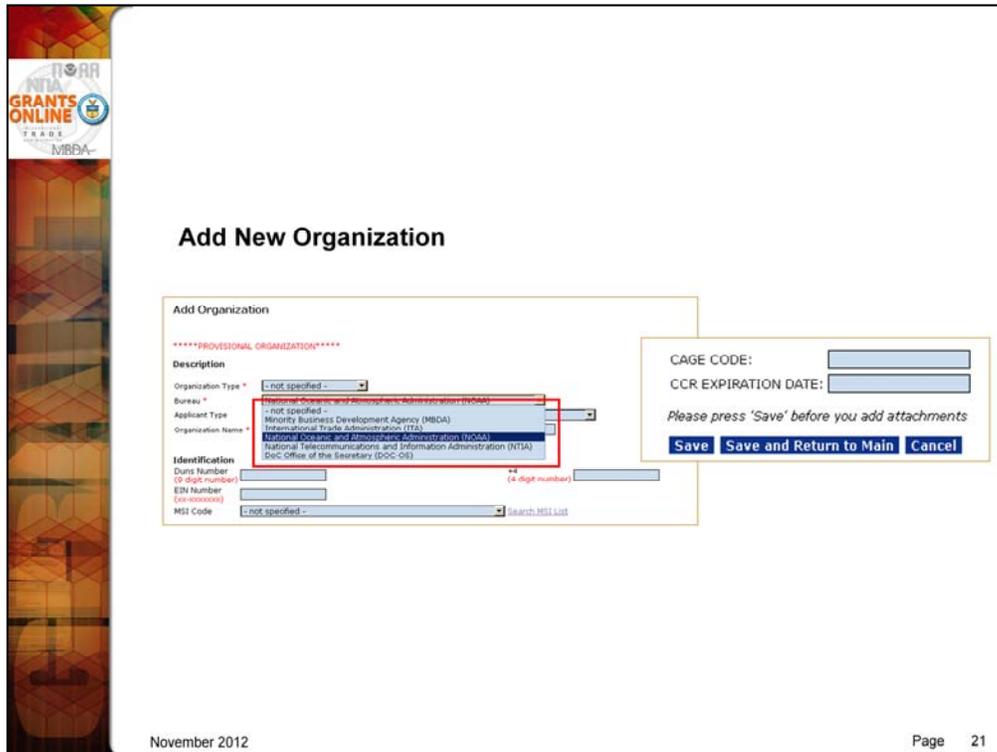
Step 1 on this page is to link the application to a recipient organization record in the Grants Online database.

- When searching for an organization in the Grants Online database use the 9-digit DUNS number alone for the initial search. Do not include the extra DUNS+4 digits in the search field if they are on the application.

Recipient – High Resolution Systems

DUNS – 602201043

- It is important to select an organization for your Bureau. If the organization that you would like to use is displayed in the search results but is associated with a different Bureau, you will need to enter a new record for your Bureau.
- An additional identifier on the Organization Profile called the “Cage Code*” may be returned in the search results. The Cage Code is a data field from the System for Award Management (SAM). SAM has replaced the Central Contractor Registry (CCR). Cage Codes are NOT displayed in Grants Online for organizations that are set up for ASAP.
- Only active records will be returned in the search results. If for some reason an organization is marked as inactive in the Grants Online database it will not show up in the search results even though it may be associated with a current award or closed award. For example, when an organization converts from non-ASAP to ASAP, the non-ASAP record will be made inactive so that it cannot be selected for a new award. If there are any closed awards for that organization before it converts to ASAP, they will remain associated with the non-ASAP record but the active ones will become associated with the ASAP record.
- You will be able to tell whether or not an organization is already set up in ASAP by the presence of an ASAP ID in the search results.



When adding a new organization you must now select your Bureau at the top of the page. If you have the organization's CAGE CODE it can be entered at the bottom of the page.

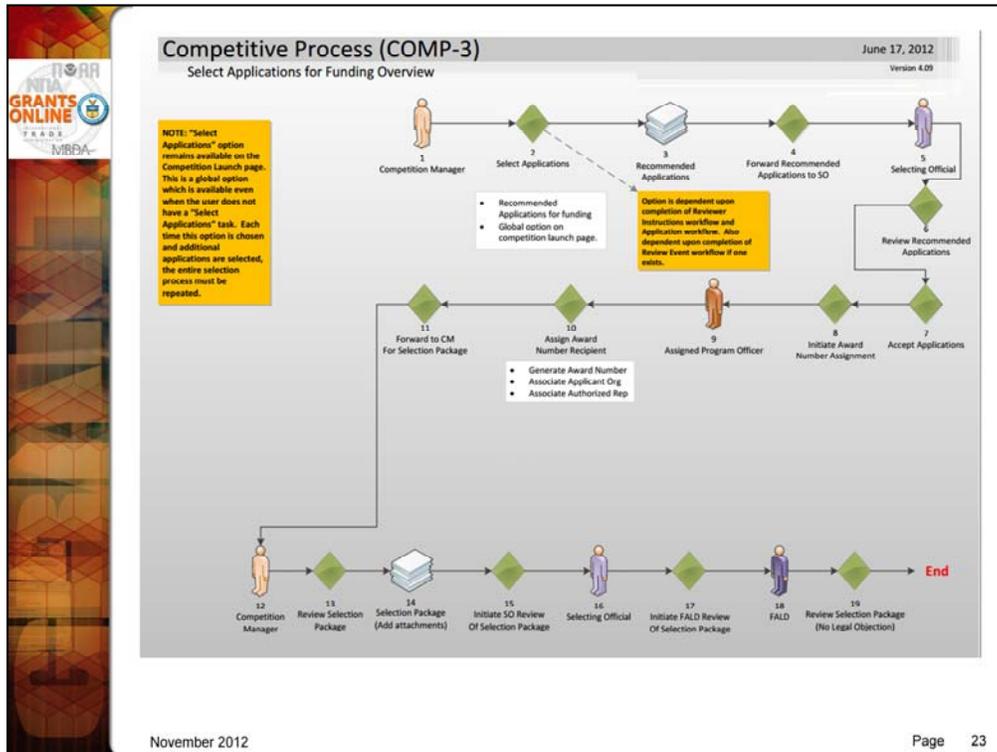
A required checkbox has been added to the PO Checklist so you can indicate if you have verified the EIN and DUNS number that the recipient entered on the submitted application. (See Slide 20) There have sometimes been typos in the EIN or DUNS number on the application which have led to inaccuracies in 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.

The screenshot displays the Grants Online system interface. At the top left, there are logos for NIFA, TRAILS, MBDA, and NARR. A workflow diagram at the top center shows a person icon (1) pointing to a yellow pentagon (2) labeled 'Conduct Negotiations', which then branches into three more yellow pentagons (3, NEPA, 12). Below the diagram is a table with 13 columns: View, Task Name, Award Number, Task Received, Document Type, Project Title, Task Status, Document Id, Task Id, Start Date, Completed Date, Applicant Name, and Propose Number. The first row is highlighted in red and contains the following data: Conduct Negotiations, N/A, 02/05/2011, Application, LB Universal2 RFA App, Not Started, 2199761, 1795527, [blank], icmr, LB Univ2 App. Below the table is a form titled 'Authorized Representative Lookup' with fields for Name, Title, Email, and a 'Find' button. A yellow callout box labeled 'Step 2: Authorized Representative Lookup - Find Auth Rep in database' points to the 'Find' button. Below the form is a section for 'Award Number' with a 'Generate' button and a 'Save and Return to Main' button. A yellow callout box labeled 'Step 3: Generate or associate award number.' points to the 'Generate' button. The footer of the page shows 'November 2012' on the left and 'Page 22' on the right.

View	Task Name	Award Number	Task Received	Document Type	Project Title	Task Status	Document Id	Task Id	Start Date	Completed Date	Applicant Name	Propose Number
View	Conduct Negotiations	N/A	02/05/2011	Application	LB Universal2 RFA App	Not Started	2199761	1795527			icmr	LB Univ2 App
View	Mobiliz. Recipients	N/A	02/05/2011	RFA	N/A	In	2199760	1795525	02/05/2011		N/A	N/A

We are currently working on a new award. However, it is very important when working on continuation amendments to select the exact same organization record that is on the original award. Right now the system does not check to make sure they are the same. If a different organization record is selected it will cause problems with the application processing further along in workflow.

When the Award number has been generated, click “Save and Return to Main”, then select the option to “Forward to Competition Manager for Selection Package”. After the last application has completed this step the Competition Manager will receive the next task to Review the Selection Package so it can be prepared for approval by the Selecting Official and FALD.



Steps 12-15

This is the point at which the Competition Manager would attach all of the pertinent Selection Package documents (e.g. Reviews, Conflict of Interest Forms, Rank Order of Applications, etc.) to the Selection Package and send for final approval.

If the actual Selecting Official is not logging into Grants Online, a copy of the Approving Document with the signature of the actual Selecting Official should be scanned and included as an attachment on the Selection Package.

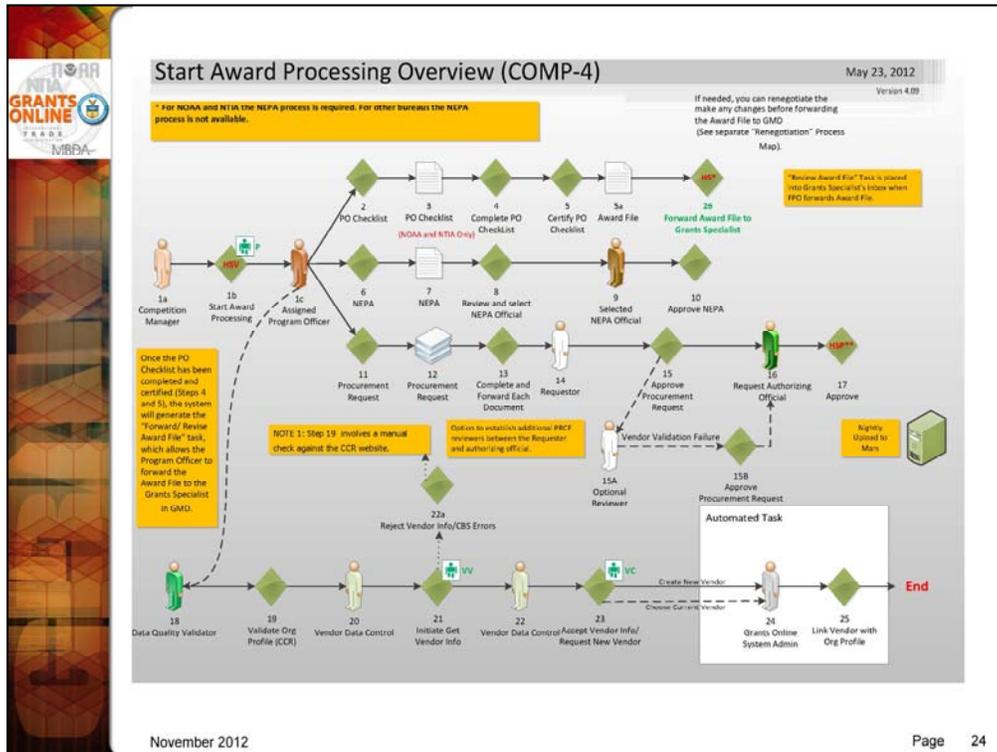
Steps 16-17

This constitutes the Selecting Official's approval of the Selection Package.

Steps 18-19

If satisfied with the Package the FALD attorney will initiate Award File workflow by choosing the "No Legal Objection" option. This will generate another "Selection Package" task for the Competition Manager. At this point the Competition Manager can, at their discretion, select additional applications and send the Selection Package back through the approval process.

NOTE: If FALD has issues with the Selection Package, they may return it to the Selecting Official *ONE TIME* with the action: "FALD Comment." The Selecting Official has a choice of following or not following any advice that FALD presents, but must send the Selection Package back to FALD. FALD can then review the actions taken by the Selecting Official, but after that they will only be able to choose the "NoLegalObjection" workflow option even if they have a legal objection.



Steps 1a-1b

To move forward with application processing, the Competition Manager would select the option to "Start Award Processing" from the "Review Selection Package" task. Once an award is checked, when the "Save" button is clicked the system will immediately generate an Award File with a PO Checklist, a NEPA document, and a Procurement Request. These documents will be in the Inbox of the Assigned Program Officer who has been working on the application. The Competition Manager can return to this task and start the award processing as needed for each individual selected application. The "Review Selection Package" task will remain in the Competition Manager's inbox until the "Terminate Selection Package Processing" option is selected.

The screenshot displays the Grants Online interface. At the top, a workflow diagram shows an 'Assignee Program Officer' (1) starting 'Award Processing', which leads to three parallel tasks: 'PO Checklist NOAA and NTIA' (3), 'NEPA' (7), and 'Procurement Request' (12). A box labeled 'To Provisional Organization Workflow' is connected to the 'Award Processing' step.

The 'Your Tasks' section shows a table with 32 items found. The following table is a simplified version of the data shown in the screenshot:

Task Name	Award Number	Task Progress	Document	Project Title	Task ID	Document/Task ID	Start Date	Completed	Applicant	Project
Procurement Request and Commitment of Funds	NA120019990022	02/02/2011	Procurement Request and Commitment of Funds	Test Training App 1 for Not Release 4.06 Comp RFA Started	2399723	1761340			Institute for Community Managed Resources (ICMR)	US Test for App 1
NEPA Document	NA120019990022	02/02/2011	NEPA	Test Training App 1 for In Release 4.06 Comp RFA Progress	2399724	1761341	02/02/2011		Institute for Community Managed Resources (ICMR)	US Test for App 1
Complete PO Checklist	NA120019990022	02/02/2011	PO Checklist	Test Training App 1 for Not Release 4.06 Comp RFA Started	2399723	1761340			Institute for Community Managed Resources (ICMR)	US Test for App 1

Below the table, the 'Pending Actions' section shows a list of tasks with their status:

Task Name	Award Number	Task Progress	Document	Project Title	Task ID	Document/Task ID	Start Date	Completed	Applicant	Project
PO Checklist	2245442	05/23/2012	\$5,000.00	2012	Complete PO Checklist: Not Started					
NEPA	2245442	05/23/2012	\$5,000.00	2012	NEPA Document: Not Started					
Procurement Request and Commitment of Funds	2245442	05/23/2012	\$5,000.00	2012	Procurement Request and Commitment of Funds: Not Started					
Organization Profile	2245442	05/23/2012	\$5,000.00	2012	Validate Organization Profile: Not Started					
Organization Profile	2245442	05/23/2012	\$5,000.00	2012	Validate Organization Profile: Not Started					

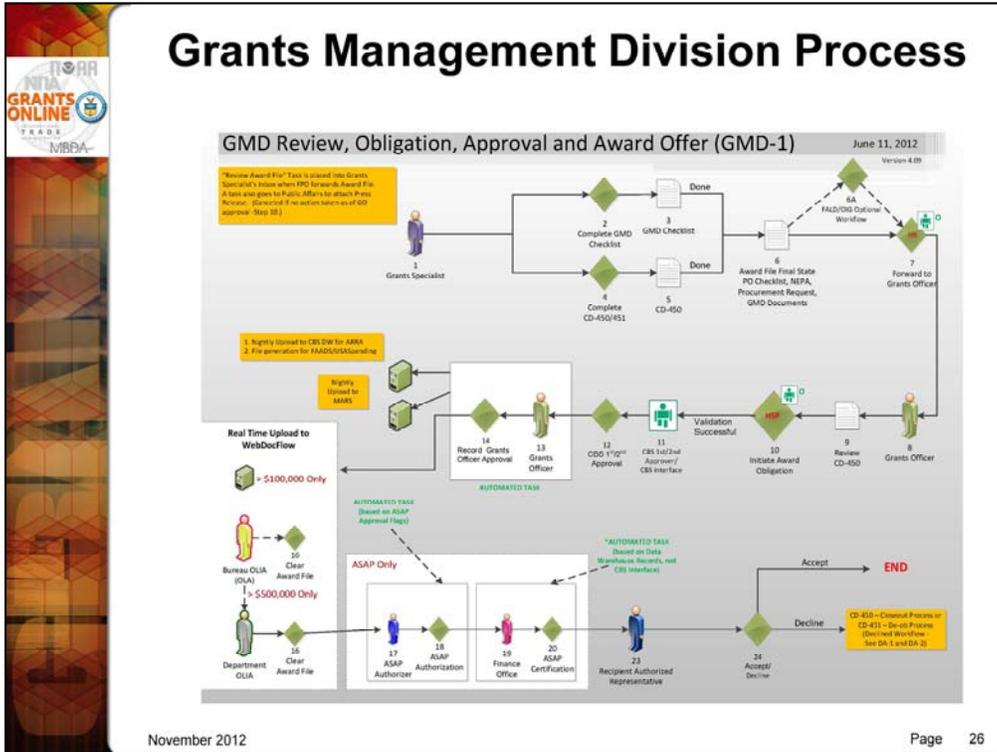
November 2012 Page 25

In the Competitive application process, the Provisional Organization workflow is initiated at the same time as the PO Checklist, NEPA, and Procurement Request when the FPO selects “Start Award Processing”. However, just like with the Universal Process, the Organization Profile task for the Provisional Organization Workflow is not in the FPOs inbox. Rather it is created in the inbox of a new Grants Online user called the Data Quality Validator. The FPO can monitor the progress of the Organization Profile by checking under “Pending Actions” on the Award File launch page.

Until the Provisional Organization workflow is completed, the FPO will not have an option to Certify the PO Checklist and the Budget Officer will not have an option to Approve the Procurement Request.

You now have 3 new tasks in your Inbox. (If not, refresh your task box.) An Award File has also been created in the database. These three tasks will each move along three separate workflow paths but will all end up as a part of the same Award File in the Grants Specialists’ Inbox. They do not have to be completed in any particular order; however, the Grants Specialist will often return an “incomplete” Award File back to the FPO because they cannot complete their work until all three documents are complete in the Award File. Therefore, you should periodically check Workflow History to make sure the Procurement Request and NEPA have completed their approval process before forwarding the Award File to the Grants Specialists. (The task with the option to forward the Award File to the Grants Specialist appears after you complete the PO Checklist.)

For the steps to complete the NEPA, PO Checklist, and Procurement Request refer to the Universal Processing section starting with page 17.



Once the Award File has been forwarded to the Grants Management Division (GMD) there are several additional steps that take place before the award offer actually gets to the recipient. GMD has 60 days to complete their review and approval process. The GMD workflow steps for processing a Competitive application package are exactly the same as for the Universal application package; however, the actual GMD review and approval process is not the same.

If funds have been removed from the ASAP accounts used on the Procurement Request after the award file was sent to GMD, the Grants Officer will not be able to approve the award and will return it to the Program Office to remedy the situation.

If the recipient organization record attached to the application is not marked as ASAP, the ASAP steps on this workflow will be skipped and the recipient will have to use an Organization Profile Change Request to initiate their ASAP enrollment after the award has been accepted. This process must still take place even if a “Non-ASAP” organization was accidentally associated with the application instead of the ASAP record for that organization.

Please note that for Non-NOAA Bureaus using Grants Online, all awards are routed to WebDocFlow for OLIA clearance regardless of the award amount.

Federal Program Officer Training Agenda

Day 3 - AM

Session 4: Post Award Actions 8:00am – 12:30pm	
Topic	Duration
Introduction and Agenda	8:00 – 8:15 (15 min)
Online Demonstration/Process Maps with Hands-On Participation – Recipient Award Acceptance	8:15 – 8:45 (30 min)
Online Demonstration/Process Maps with Hands-On Participation – AAR, PPR, FFR	8:45 – 10:00 (1 hr 15 min with 1 break)
Online Demonstration/Process Maps with Hands-On Participation – Partial Funding Process Map/Screen Shot Review of Additional Processes: <ul style="list-style-type: none"> - Reduce Funding - De-obligate Declined Amendment - Correct Access Lines on Approved Award - Correct Award Dates (Administrative Amendment) - Organization Profile Change Request 	10:00 – 12:15 (2 hr 15 min with 1 break)
Additional Resources and Training Questions and Comments Evaluations	12:15 – 12:30 (15 min)

Objectives – By the end of this class students should:

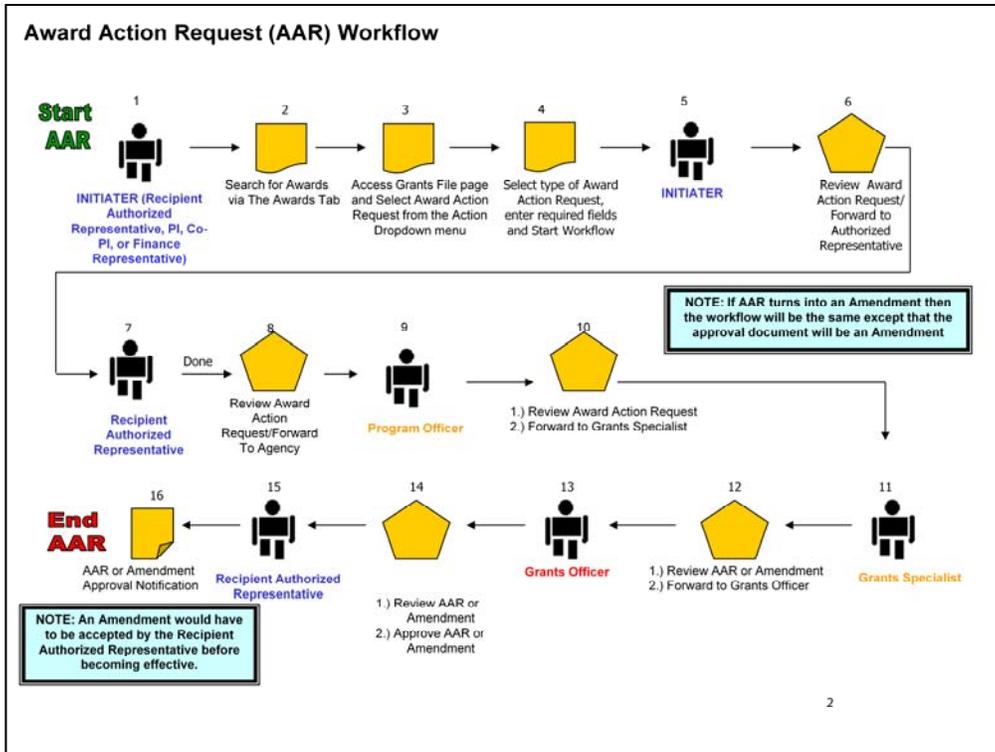
- Understand the Recipient Award Acceptance Process
- Understand the use of an Award Action Request
- Be able to review an Award Action Request
- Be able to review, route (if needed), and accept a Performance Progress Report
- Be able to find and view a Financial Report
- Understand the use of a Partial Funding Action
- Be able to initiate and route a Partial Funding Action
- Be aware of additional Post Award Functions
- Know where to find help when needed

Training Materials:

1. Agenda and Objectives
2. Process Maps – AAR Workflow
3. Process Map – Progress and Financial Reports
4. Student Screen Shots – Post Award Processes
5. Course Evaluation



**Grants Online
Award Action Request
Process Maps and Screen Shot**



Award Action Request Index Page

[* No Cost Extension - Prior Approval Required](#)

[Extension to Close Out](#)

[* Change in Scope](#)

[* Transfer of Award](#)

[Change in Principal Investigator/Project Director](#)

[Change in Key Person Specified in the Application](#)

[Simplified Special Award Conditions](#)

[Transfer of funds allotted for training to other categories of](#)

[expenses](#)

[Pre-Award Cost](#)

[Other](#)

[No Cost Extension - Prior Approval Waived \(Research Terms and Conditions\)](#)

[Reprogram or Rebudget](#)

[Equipment Purchase](#)

[Foreign Travel](#)

[Sole Source Contract](#)

[Absence of more than 3 months or 25% by project director or PI](#)

[Inclusion of cost that require prior approval based on cost principles](#)

[* Sub award, transfer or contracting out of any work under the award if not described in the approved](#)

[application](#)

[* Termination for Convenience](#)

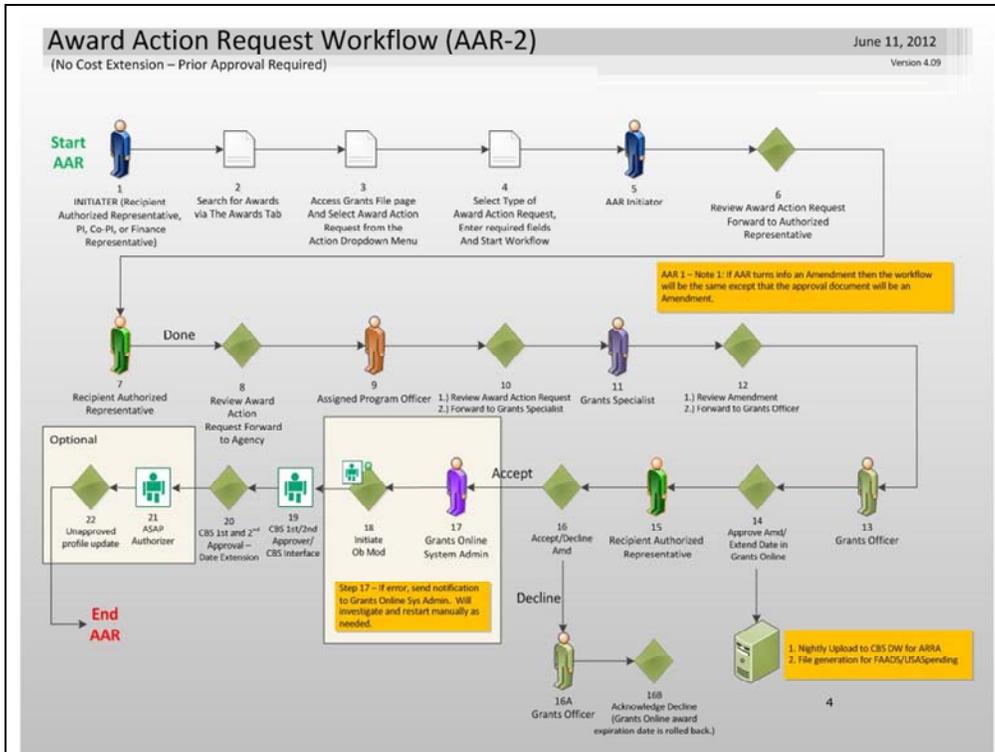
Grantees:

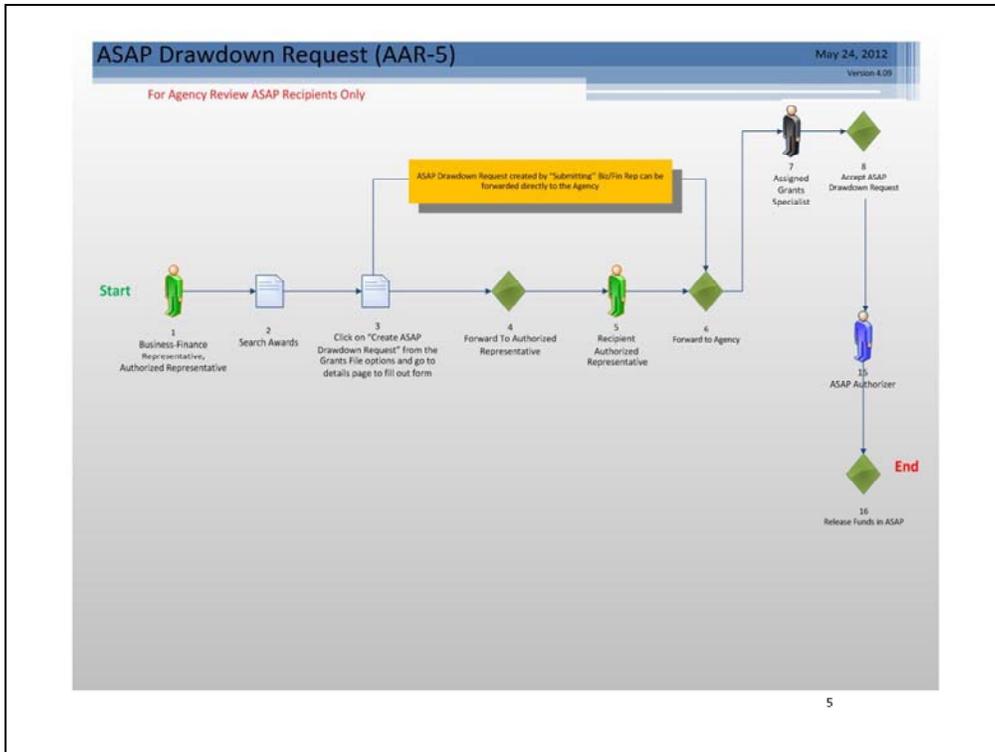
Please note that the above listing contains all the possible Award Action Requests that can be created on this Award. While the ability to create these Award Action Requests is given to all grantee users, they can only be forwarded to the agency by the Authorized Representative.

* Note: Award Action Requests marked with an * will always result in an amendment to the award (if approved). Other requests generally result in a notification of approval. However, any request may result in an amendment at the discretion of the Grants Officer. See guidance document for more information.

[Guidance](#)

[Return to Main](#)



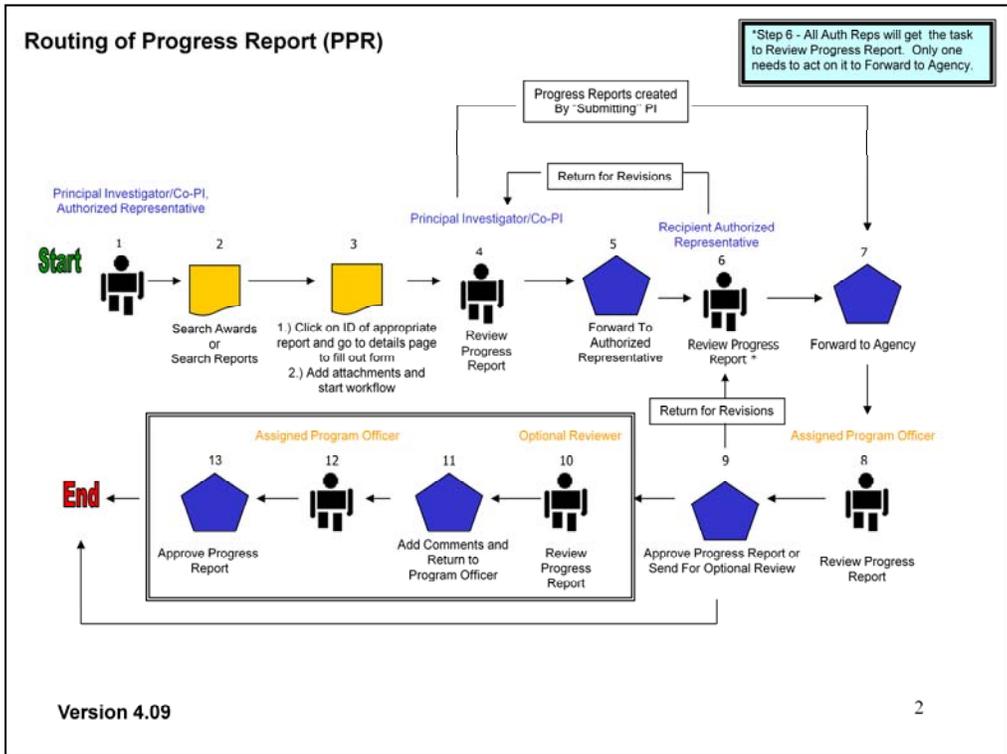


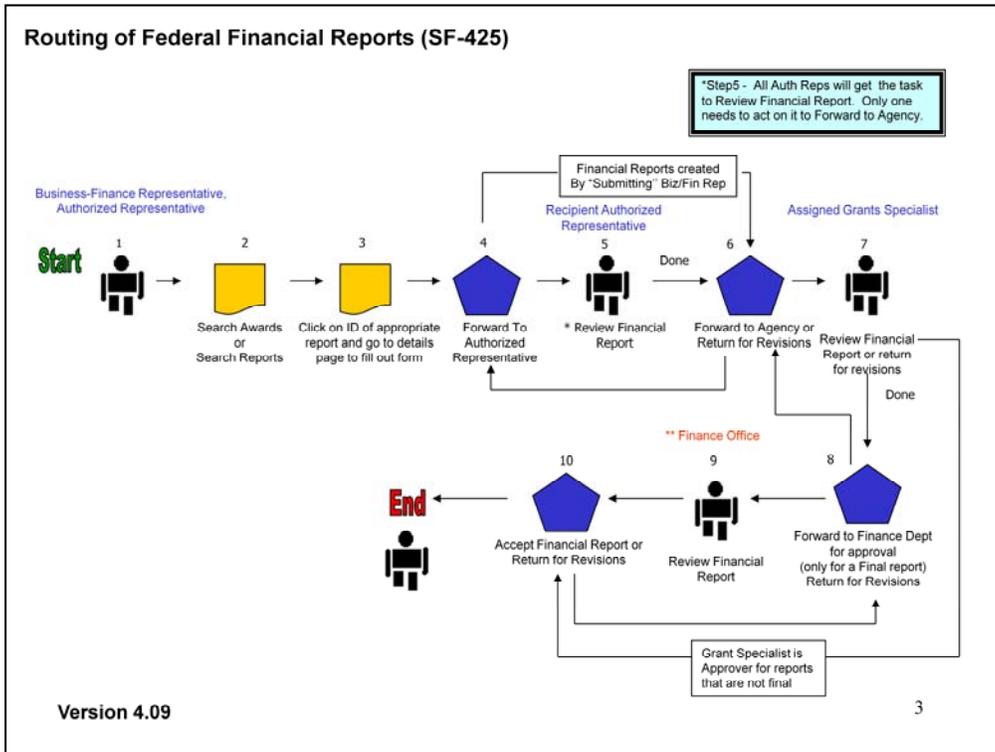


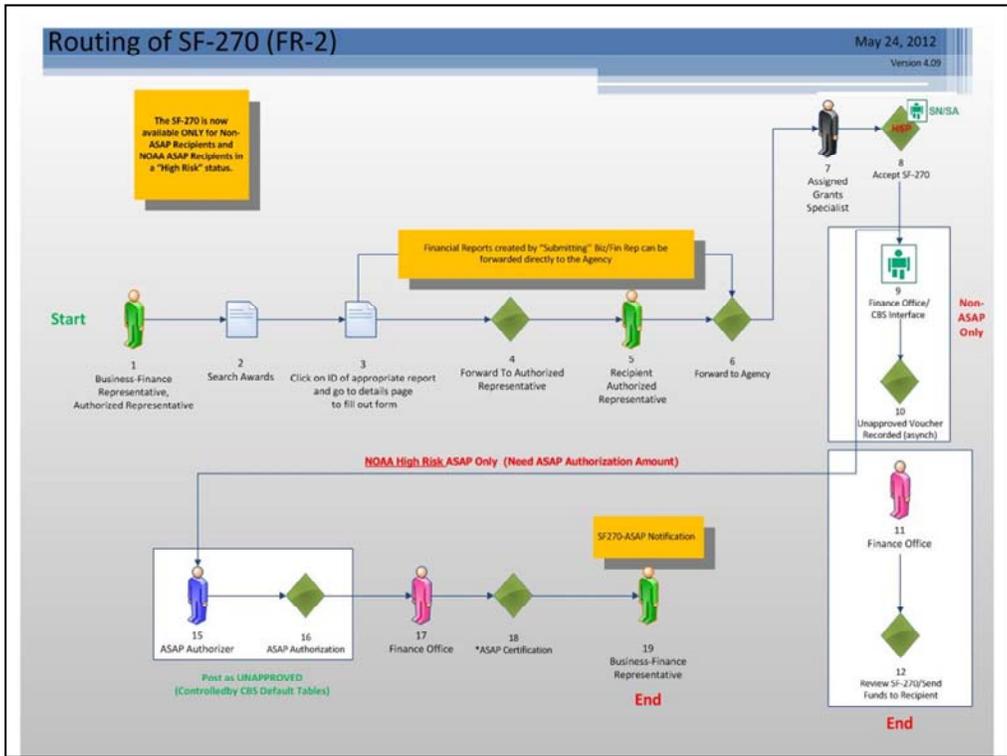
**Grants Online Process Maps
Overviews Only
Performance Progress Report (PPR)
&
Federal Financial Reports
(SF-425, SF-270)**

Version 4.09

1



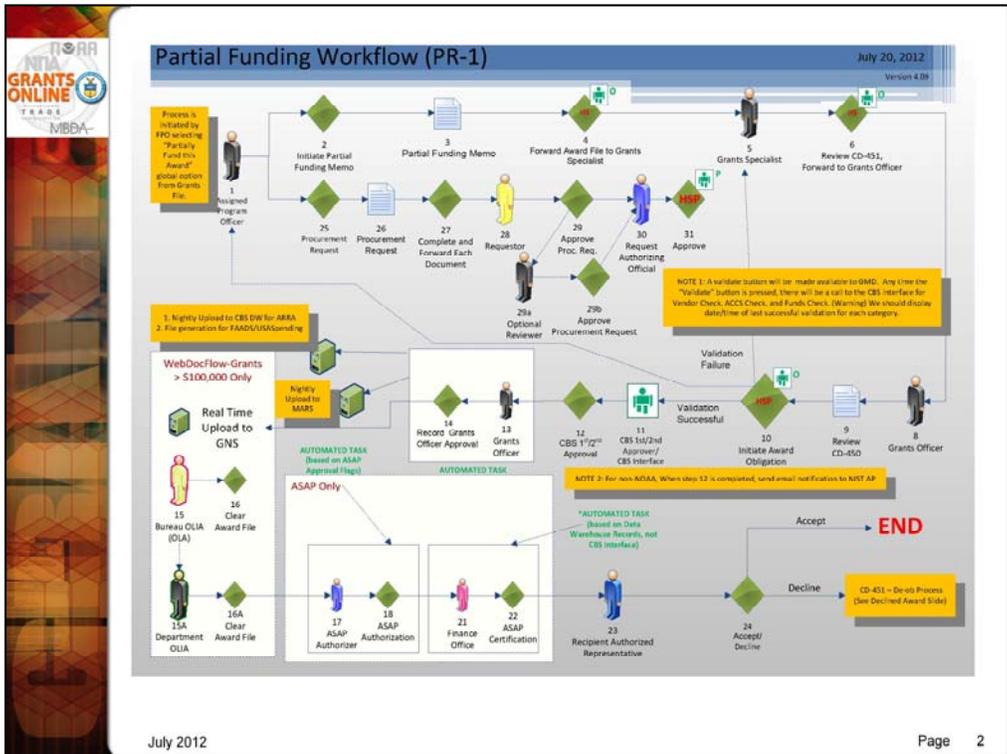






Grants Online Training Post Award Processes

July 2012





**NIFA
GRANTS
ONLINE**
TRADE
MARK
MIBDA

FPO – Partial Funding Steps 1 and 2

Search Awards

Award Number:

Recipient Name:

Project Title:

Award Status:

PI-PO Last Name:

[Search](#) [Reset](#)

Please use the above fields to narrow down your search. Searches are not case-sensitive. Fields can be partially completed to get all matching results.

Search Results

26 items found, displaying all items. 1

Award Number	Org ID	Recipient Name	Project Title	Award Status	Pri Inv File
NA09GOT4990038	2001132	Institute for Culturally Managed Resources (ICMR)	TEST RECORD - Grants Online Training Applications6	Accepted	None
NA09GOT4990027	2001132	Institute for Culturally Managed Resources (ICMR)	TEST RECORD - Grants Online Training Applications7	Accepted	None Designated
NA09GOT4990009	2001132	Institute for Culturally Managed Resources (ICMR)	TEST RECORD - Grants Online Training Application	Accepted	None Designated
NA09GOT4990076	2001132	Institute for	TEST RECORD - Grants	Accepted	None Designated

Grants File - NA09GOT4990038

Id: 2139154
Status: Accepted

Action: [Submit](#)

Your Comments:
[View Accounting Details](#)
[View/Manage Award-related Personnel](#)

[Spell Check](#)

[Save Comment](#)

1. From the Award Tab, search for the Award to be used for Partial Funding.
2. From the Grants File Launch Page select "Partially Fund this Award" in the Action dropdown list, then click "Submit".

July 2012

Page 3



FPO – Partial Funding Steps 3 and 4

Partial Funding -- NA09GOT4990038

Memo * Guidance

[Spell Check](#)

Approved Plan and Prior Obligations

Action	Application ID	Project Title
Select	2139113	TEST RECORD - Grants Online Training Application05

Selected Application

None

[Cancel](#)

Approved Plan and Prior Obligations

Action	Application ID	Project Title		
Select	119113	TEST RECORD - Grants Online Training Application05		
Planned Year	Approved Fed Share	Obligated	Approved Non-Fed Share	Assigned Non-Fed Share
2009	\$135,000.00	\$135,000.00	\$0.00	\$0.00
2010	\$125,000.00	\$0.00	\$0.00	\$0.00
2011	\$250,000.00	\$0.00	\$0.00	\$0.00

3. Click on the “plus (+)” beside the Action box to get details for the appropriate application for the Partial Funding. (All applications associated with the award will be available, but Partial Funding can be done on only ONE application at a time.)

4. Click the “Select” button to chose the desired application.

July 2012

Page 4



FPO – Partial Funding Step 5

Organization Name: Institute for Culturally Managed Resources (ICMR) Electronic Recipient: Yes ASAP Recipient: [blank]

SF-425 Frequency: (after 3/31/2009) Semi-Annual Cash Flow with Report

Progress Report Frequency: Semi-Annually

Final Reports Due On: 12/29/2012

Project Title: TEST RECORD - Grants Online

Principal Investigators-Project Directors: None Designated

Partial Funding -- NA09GOT4990038

Memo * [Guidance](#)
Enter appropriate memo language here. See guidance.

Spell Check

Grants Online Partial Funding Guidance Partial Funding Memo

The Partial Funding Memo is used to explain the state of funding for the approved Application. A clear and precise explanation of what is happening in this Partial Funding will greatly assist GMD personnel in processing the action. Typically, Partial Funding actions are used to fund the out-years of multi-year awards, with a single application being submitted for the award's duration. However, some awards will have multiple multi-year applications associated with them. Older awards are single-year awards for which the fully approved amount was not provided in the initial award. Every situation requires an explanation.

5. Enter appropriate language into the Memo box. (See last slide for sample language which is also available from the "Guidance" link.)



FPO – Partial Funding Steps 6 and 7

Partial Funding -- NA09GOT4990038

Memo * [Guidance](#)

Enter appropriate memo language here. See guidance.

Windows Internet Explorer

WARNING: Release of Funds and Procurement Request workflow tasks will be placed in your inbox. Are you sure you wish to proceed?

Selected Application

Application ID	Approved Fed Share	Remaining Fed Share	Pending Fed Share	Fed Add Amount	Approved Non-Fed Share	Remaining Non-Fed Share	Pending Non-Fed Share	Non-Fed Amount	AMD No.	Project Title
2139113	\$500,000.00	\$375,000.00	\$325,000.00	10,000.00	\$0.00	\$0.00	\$0.00	0.00	0	TEST RECORD - Grants Online Training Application05

Note: Federal Add Amount plus Pending Federal Share plus the sum of all prior obligations may be up to 5% greater than the Approved Federal Share. If exceeding the Approved Federal Share, enter a memo explaining the reason for the additional funds.

Note: Only one application may be funded per Partial Funding action.

6. Enter amount of Partial Funding into the "Fed Add Amount" box and appropriate Non-Fed Amount if applicable.
7. Click "Save and Start Workflow." Click "OK" on the warning message alerting you that a Procurement Request is being put into your task box. You will be returned to the launch page of the new Award File.



FPO – Partial Funding Step 8

Your Tasks

Document Type: Status: [Apply Filter >>](#)

34 items found, displaying all items. 1

View	Task Id	Award Number	Task Name	Task Status	Applicant Name	Document Type
View	1380605	NA09GOT4990038	Procurement Request and Commitment of Funds	Not Started	Institute for Culturally Managed Resources (ICMR)	Procurement Request and Commitment of Funds
View	1380604	NA09GOT4990038	Review Release of Funds	Not Started	Institute for Culturally Managed Resources (ICMR)	Award File

8. Navigate to the “Inbox” “Task” screen. There should be two new tasks: (1) Procurement Request and Commitment of Funds and (2) Review Release of Funds. (The Procurement Request should be completed and sent through workflow. The process works just like a new award and will not be repeated here.) Click on “View” for Review Release of Funds.

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FPO – Partial Funding Step 9

Award File In Progress - NA09GOT4990038

ID: 2147952
Status: Program/Action/Action - Not Started

Action: Forward to Grants Specialist for Review Submit

Your Comments: Please select an action Edit Special Award Conditions Forward to FALD for Review Forward to Grants Specialist for Review Reassign Award File View Amendment Details View PAIS Sheet View Resourcing Requirements View/Edit Partial Funding Document Save Comment

View Award File History

Attachments

Pending Actions X

Line	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status	Last Action Date	Last Action Done
1	2147952	04/24/2009		2009	Procurement Request and Commitment of Funds: Not Started		NOAA Student

NOTE: Be sure Procurement Request has been approved before forwarding the Award File to the Grants Specialist. (Red "X" should change to a green check mark.)

9. In most cases, *after the Procurement Request has been approved*, you can simply select "Forward to Grants Specialist for Review" and add a workflow comment. Do not make any edits to the "Amendment Details"; they will be done by the Grants Specialist. If changes to the Partial Funding Memo or Funding Amounts are needed select "View/Edit Partial Funding Document".

NOTE: *If changes are being made to the Federal Funding Amount, the Procurement Request task must also be in your Inbox. Make sure the same changes are made on both documents.*

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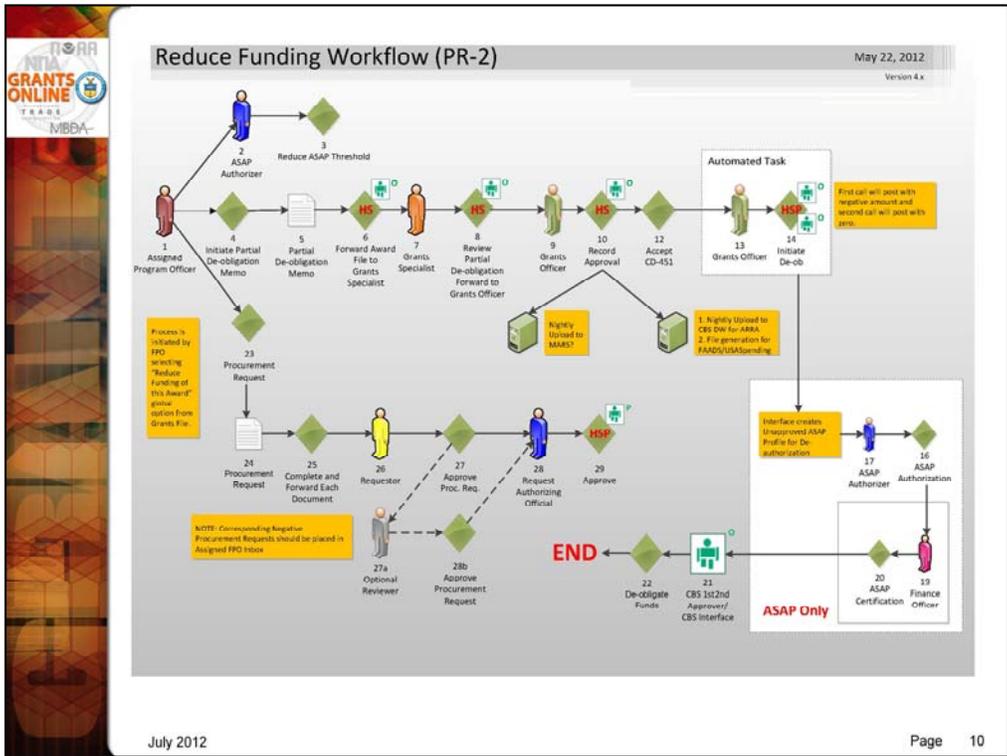
8



Sample Language for Partial Funding Memo

- (STANDARD) This release of funds of \$ ____ is for year __ of a __ year multi-year award. All required Progress and Financial reports have been submitted and accepted.
- (EXAMPLE 2) This release... Due to _____, total funding for this award period is not available; additional funds will be provided at a later date. All required Progress...
- (EXAMPLE 3) This release... Due to _____, total funding for this award period is not available in this FY. Additional funds will be provided in FY __. It is our intent to provide total funding for this award. All required Progress...
- (EXAMPLE 4*) This release... Due to _____, additional funds will not be provided and this award will be reduced by _____. All required Progress and Financial reports have been submitted and accepted.
- (EXAMPLE 5) This release of funds is expected to be the final release of funds in FY _____. The remainder of the project is expected to be funded in FY ____ through FY ____ assuming funds are available. All required Progress...
- (EXAMPLE 6**) This release of funds of \$ ____ is for year __ of a __ year multi-year application which was originally funded as Amendment _____. All required Progress...
- **NOTES:**
 - *When no additional funds are to be made available then the Program Office needs to advise the Grants Officer so that an amendment can be created informing the recipient that no additional funds will be provided and that they have the option of continuing work with existing funds or terminating the award.*
 - ** If Federal Funding is being reduced, the match should be reduced accordingly.*
 - *** If the Partial Funding is on a continuation application instead of the original award, note the appropriate amendment number in the Partial Funding Memo.*

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The Reduction in Funding workflow follows a very similar process as the Partial Funding Workflow and has the same “Look and Feel”.

Grants File - NA12GOT9990023
 Id: 2245484
 Status: Accepted

Action:
 Your Comment:
Reduce Funding of this Award (highlighted)
 View Accounting Details
 View/Manage award-related Personnel

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.
 143 / 4000

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

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On the Reduce Funding Memo only the “Fed Deduct Amount” and “Non Fed Amount” (also a deduction) are available for data entry of funding amounts. The word “Deduct” will be added to the Non Fed Amount label to avoid confusion. Even though positive numbers should be entered into these fields the amounts will be deducted from the award.

The screenshot displays the NHTA Grants Online interface. On the left is a vertical sidebar with the NHTA logo and 'GRANTS ONLINE' text. The main content area features a table of tasks and a summary box.

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

Last CBS Validation: Status:

Active Procurement Requests:
Nothing found to display.

Withdrawn Procurement Requests:
Nothing found to display.

Federal Share: * \$

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. The Procurement Request must be filled out using negative numbers for the funding reduction, and the workflow must be completed by the Authorizing Official (Budget Officer role) in order to be able to forward the action to the Grants Management Division.

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)

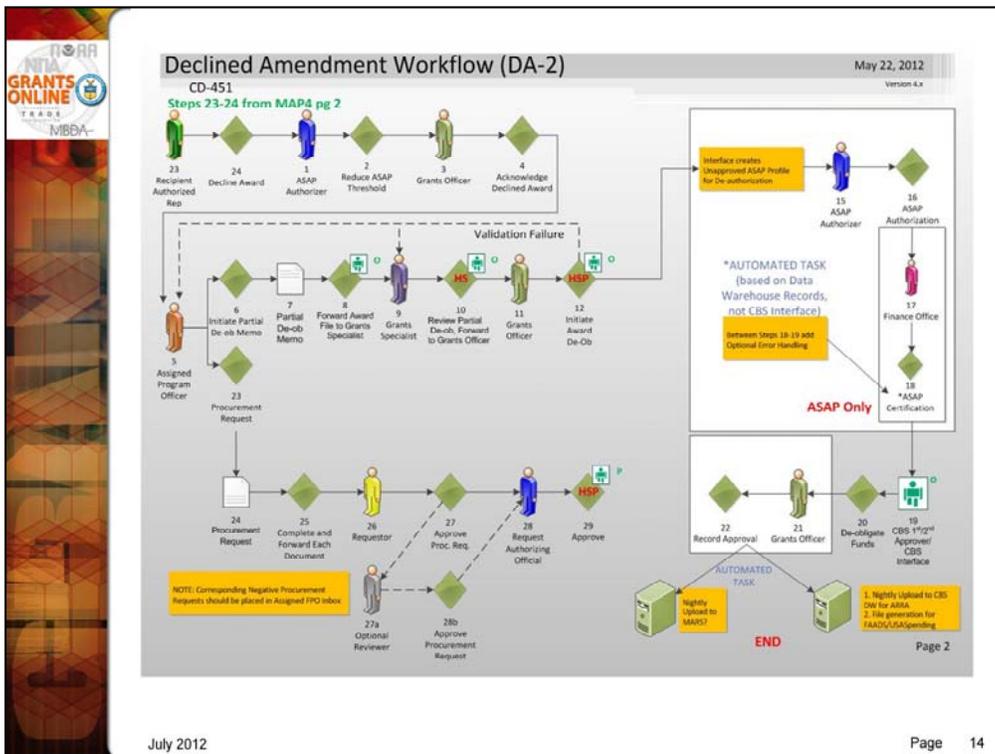
The Grants Management Division has reviewed the subject award. This document serves as authorization to proceed with the de-obligation process.

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.

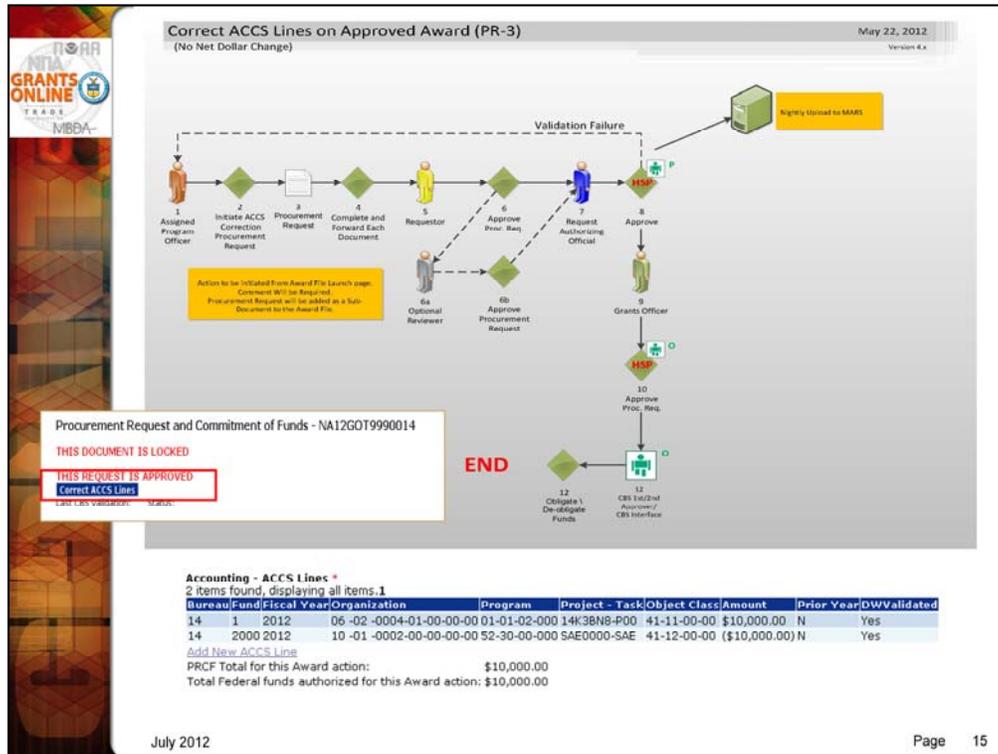
Grants Officer Approval:
De-obligation Completed: Grants Online-CBS Interface
Finance Office Approval: N/A

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The Award File for a Reduction in Funding contains a de-obligation memo to document the de-obligation by the system via the interface. In the case of a non-Interfaced award the workflow will flow through the Finance Office to manually approve the de-obligation memo. There is no activity required by the Federal Program Officer on the de-obligation memo, but it is available for viewing.



For a FPO, the Declined Amendment workflow looks just like a Reduction in Funding except that the tasks are generated when the Grants Officer acknowledges the declined award as opposed to the Federal Program Officer initiating the action.



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

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

*** NOTE: Only the Assigned Program Officer on the Award has this option.

The screenshot displays the 'Administrative Amendment - Date Changes (GMD-2)' workflow and a corresponding form. The workflow diagram includes steps such as 'Search for Awards via the Awards Tab', 'Select link for Amendment and complete Required Fields', 'Review Amendment', 'Approve/Decline Amend', and 'Acknowledge/Inquire'. The form below the workflow contains the following information:

Amendment to Financial Assistance Award

CFDA Number: 11.999

Award Number: NA12G019990014

Recipient Name: Institute for Community Managed Resources (ICMR)

Amendment Start and End Dates: [] - []

Grant Type: Grant Cooperative Agreement

Amendment Number: Pending

Street Address: 123 Main Street, Washington, DC 20000

Extend Work Completion To: N/A

Project Start and End Dates: [] - []

The Amendment Start and End Date fields and the Project Start and End Date fields are not part of the official CO-451. The Amendment Start and End Dates are for internal reporting purposes only and cannot be used by themselves to extend the award. The award can only be extended using the Project End date field or by submission of a No-Cost Extension Award Action Request.

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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. Both the Start and End dates can be modified.

NOAA GRANTS ONLINE

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
Physical Address		
Legal Name or DBA	Institute for Community Managed Resources (ICMR)	
Street Address	123 Main Street	
City	Washington	
State	DC - District of Columbia	
Zip/Postal Code	20000	
Country	USA - United States	
Phone	301-555-1212	
Mailing Address		
Mailing Name	ICMR	
Street Address	123 Main Street	
City	Washington	
State	DC - District of Columbia	
Zip/Postal Code	20000	
Country	USA - United States	
Business Identifiers		
EIN	98-7654321	
DUNS	123456789	
DUNS Plus4		
CAGE / NCAGE		
ASAP ID		Enroll in ASAP >>
Applicant Type	M - Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)	

*Justification for Changes

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The New Organization Profile Change Request screen will allow recipients to submit changes to their various data fields of identifying information on their Organization and Vendor records. It also allows Non-ASAP recipients to initiate the ASAP Enrollment process by submitting their Point of Contact information via Grants Online instead of using a separate email.



Known Issues from Release 4.09

- During renegotiation, if changing organizations, the Authorized Representative will be removed from the application since that person was associated with the original organization selected. The user will need to remember to add the Authorized Representative again because the system will allow workflow to move forward without the Authorized Rep being on the Application. This will cause workflow to hang at a later point in the process.
- If CBS is down during the "Conduct Negotiations" process, the system will not be able to detect if the selected organization is linked to a CBS vendor so it will initiate the "Provisional Organization" workflow. The solution is simply to have the Vendor users complete the workflow; it will just re-link with the same CBS vendor.
- If a CBS Error or Warning message is generated on a Procurement Request with multiple ACCS lines, the order of the lines on the message may be different from the order on the Procurement Request screen.

Q&A

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