



**Grants Online Training
New Federal Program Officers**

February 2013

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
MBDA	Minority Business Development Agency

DOC Grants and Grants Online Acronyms

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

January 2013

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

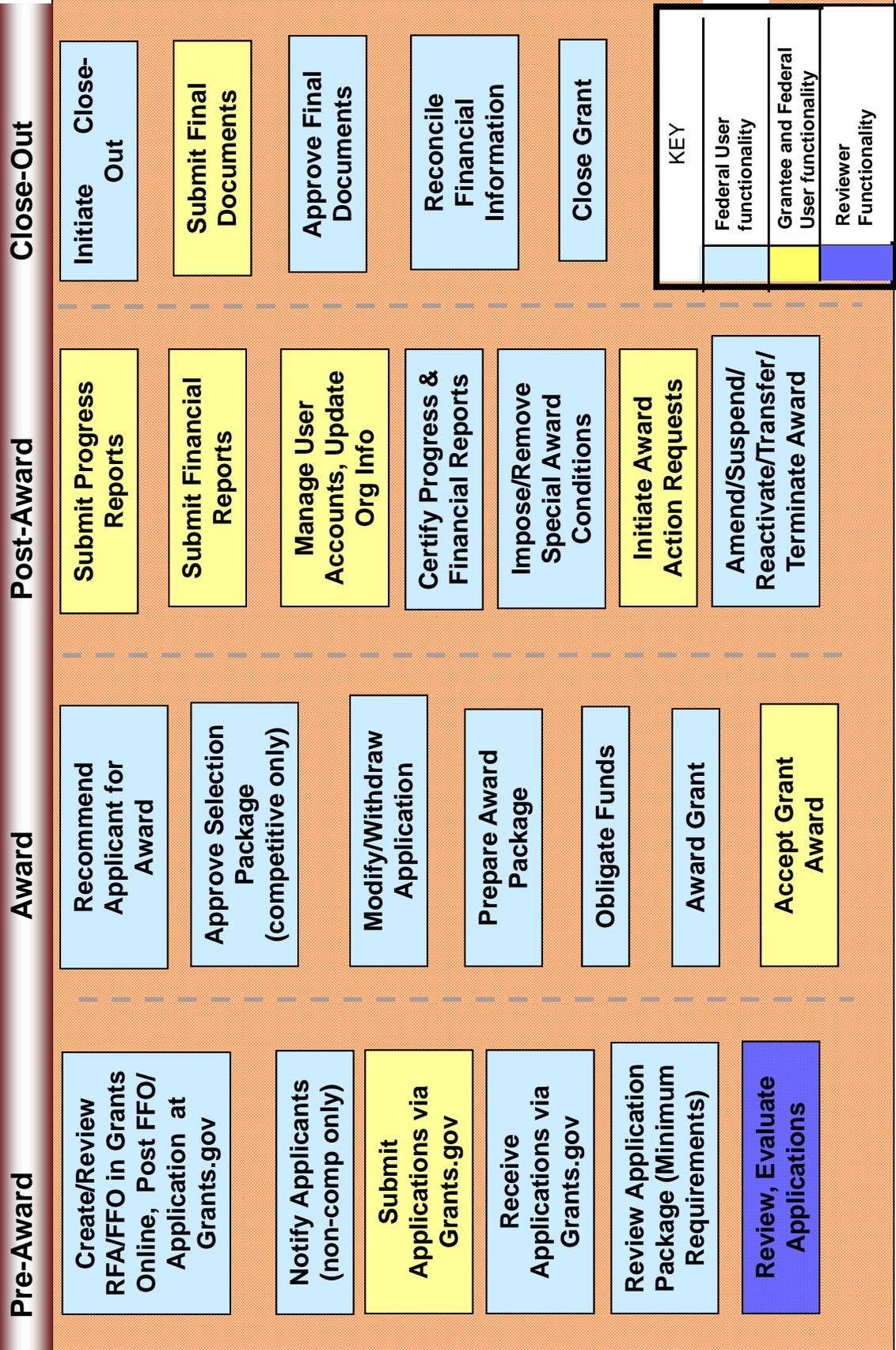
Rollout to Grantees – October through August FY 2006

Rollout to DOC – March 2009

Review Module – October 2011

CBS Interface – June 2012

Grants Life Cycle



Grants Online and Grants.gov



Applicants



General
Public

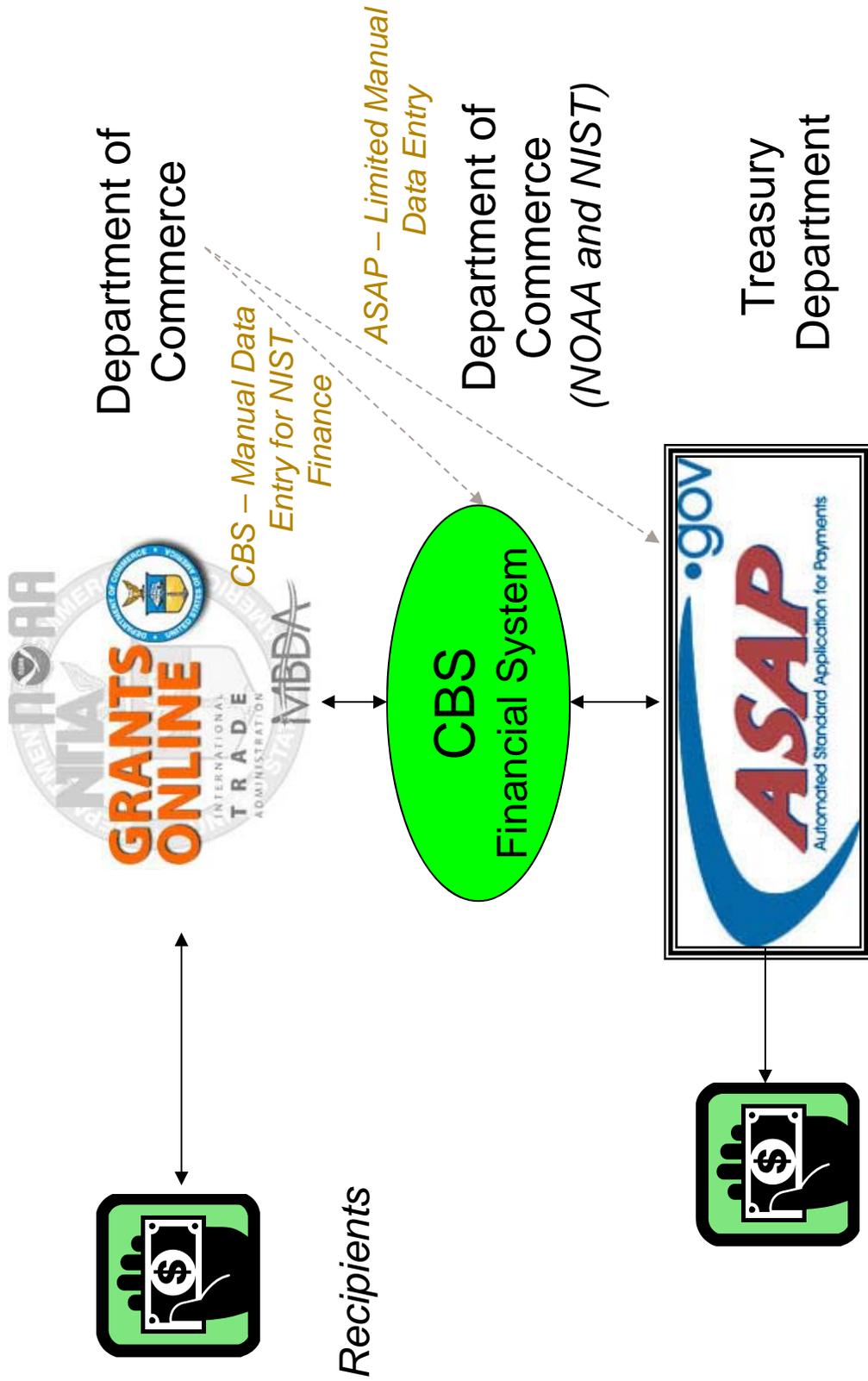


Recipients



DOC

Grants Online and ASAP



Department of
Commerce

*CBS - Manual Data
Entry for NIST
Finance*

Recipients

*ASAP - Limited Manual
Data Entry*

Department of
Commerce
(NOAA and NIST)

CBS
Financial System



Recipients

Treasury
Department

Grants Online Document Relationships



Pre-Award Processing

Post-Award Processing

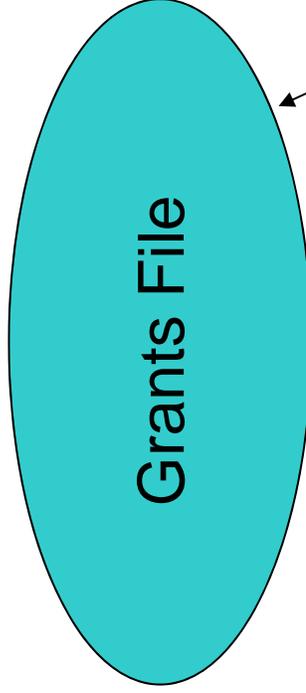


FFO Posted

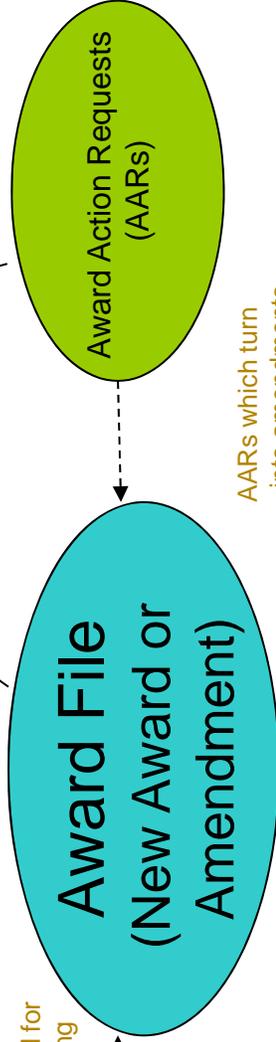
Application Received by NOAA

Application Submitted

If Selected for funding



Progress Reports
Financial Reports



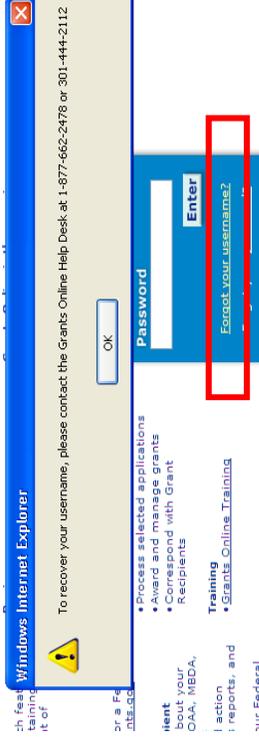
AARs which turn into amendments

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.**





Buttons vs. Column Headings

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.

Competitions
 Press Save before selecting the following link(s)

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

[Add New](#)

Attachments:

Save Create Publication(s) Save & Continue Cancel

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

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

Document Type: Status:

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.

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)**

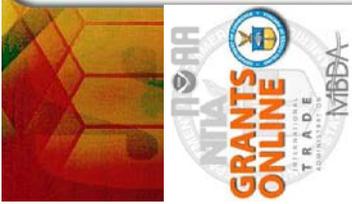
- Provides the final approval on all grant management matters
- Federal Grants Management Experts
- Provides oversight on the financial aspects of the project – *receives and accepts the Financial Reports (SF-425, SF-270)*



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	Brenda Alford	301-734-1174
NOAA/USEC/OED	Sarah Schoedinger / Meka Laster	704-370-3528 / 301-713-9437
MBDA	Holden Hoofnagle / Cynthia Rios	202-482-3937 / 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





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								
Approve NEPA Document							X				
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/PPD	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.
GMAC (Grants Management Advisory Committee)	This role is reserved for the official members of the NOAA Grants Management Advisory Committee and their designated backups, 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	<p>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.</p>
Program Office Requestor	<p>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.</p>
Program Office Reviewer	<p>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.</p>
Program Office Staff	<p>This is a staffing role to Federal Program Officers. They may assist in the development of RFAs, 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.</p>
Progress Report Reviewer	<p>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</p>
Public Affairs Liaison	<p>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).</p>
Recipient Administrator	<p>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.</p>
Recipient Authorized Representative	<p>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.)</p>
Recipient Business/Finance Representative	<p>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.</p>
Recipient Principle Investigator	<p>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.</p>
RFA Publisher	<p>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.</p>
Selecting Official	<p>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.</p>
View Program Office (Line Office, Agency)	<p>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).</p>



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.



Warning!

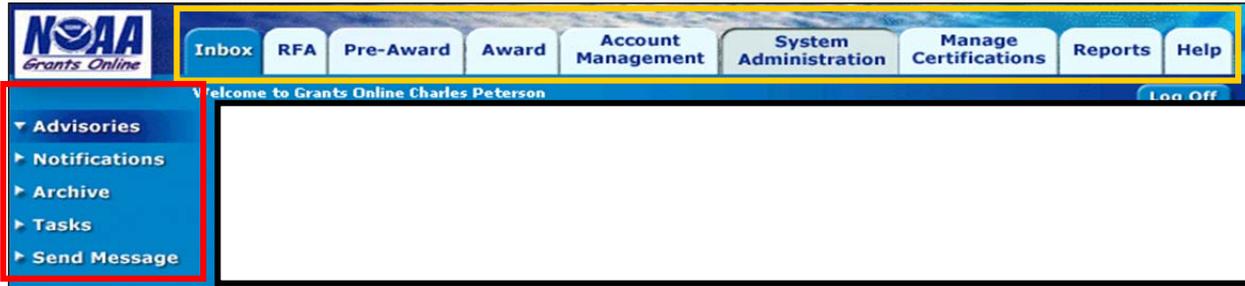
If you entered your username or password incorrectly you will see an error message in red on the screen. After three unsuccessful attempts to log in, the system will lock you out and you will have to click on the "Forgot your Password?" link to reset it using your security questions.

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).



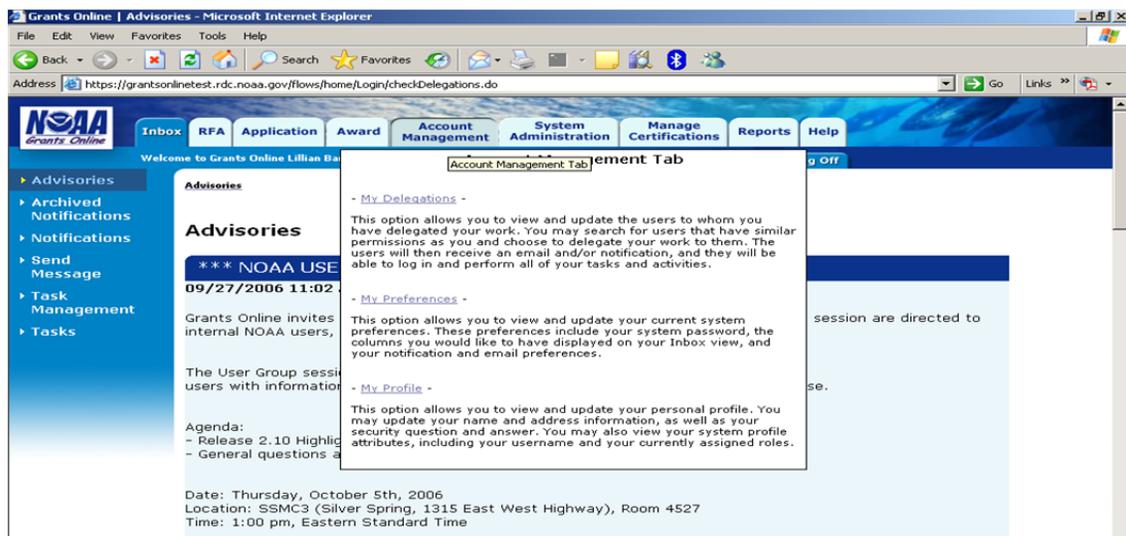
- **Navigation Pane:** Highlighted by the red border, is the navigation pane. Based on the Tab that you are currently on, commands for certain function display here. Click on the desired command to go to that specific screen.
- **Document Pane:** Highlighted by the black border, is the document pane. 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.

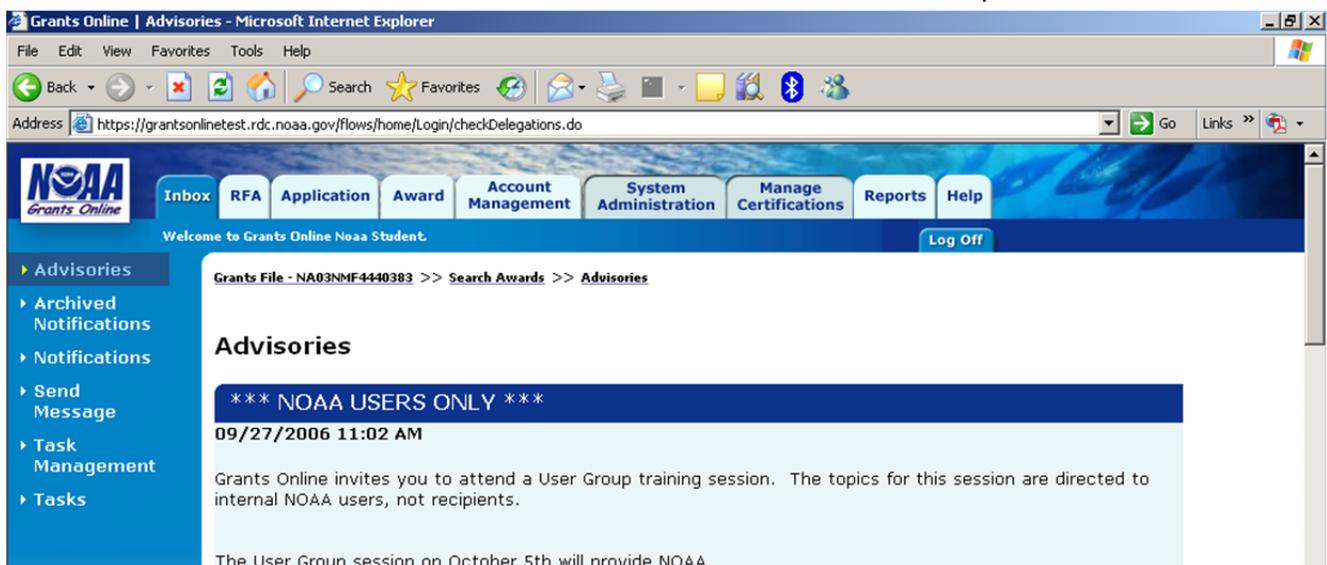
Pop Up Short Cuts

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.



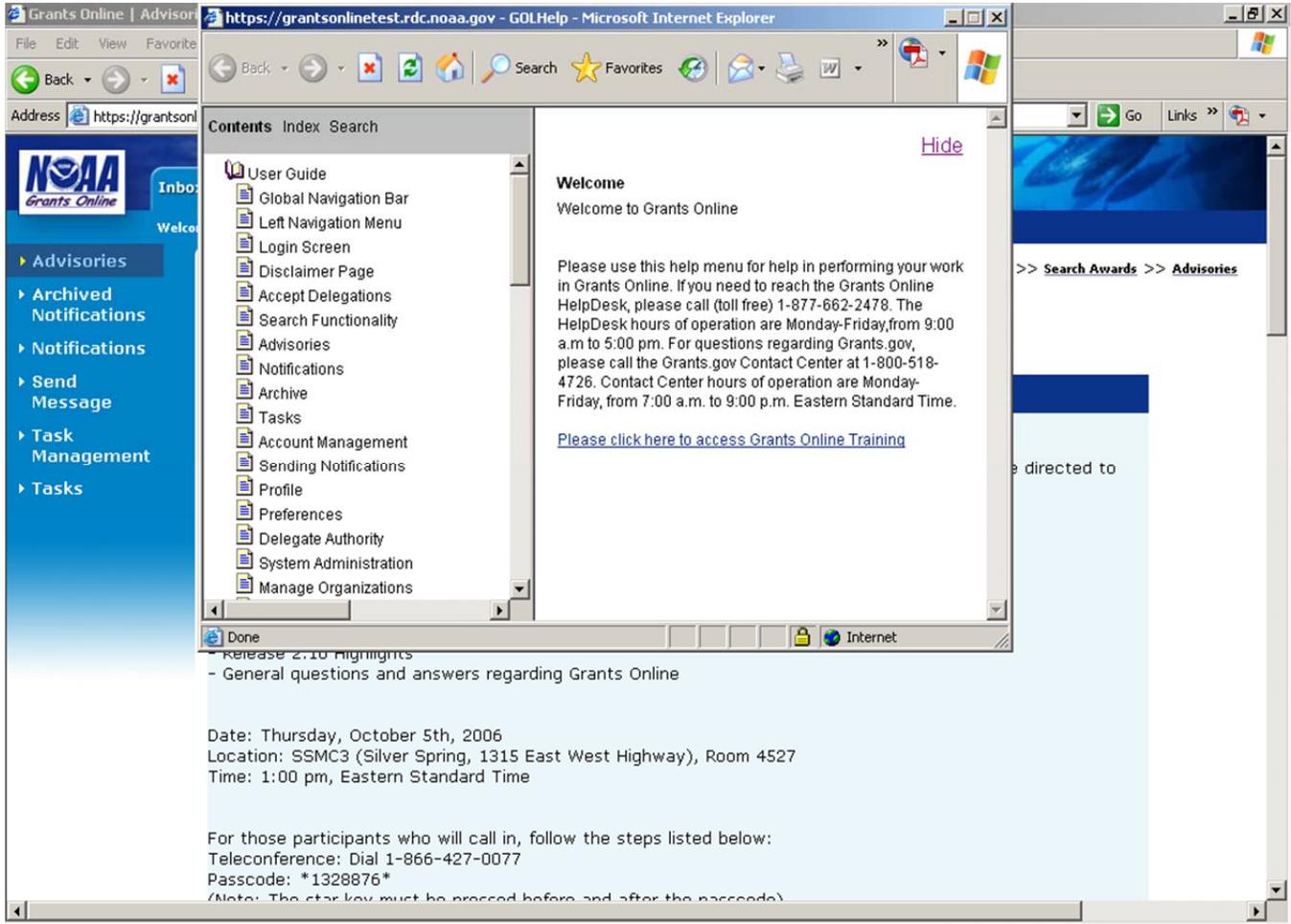
Breadcrumbs

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	NA06MOS4730010	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.



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.

Welcome to Grants Online Mark La Fave [Log Off](#)

Account Management

- [MY PROFILE](#) -

This option allows you to view and update your personal profile. You may update your name and address information, as well as your security question and answer. You may also view your system profile attributes, including your username and your currently assigned roles.

- [MY PREFERENCES](#) -

This option allows you to view and update your current system preferences. These preferences include your system password, the columns you would like to have displayed on your Inbox view, and your notification and email preferences.

- [MY DELEGATIONS](#) -

This option allows you to view and update the users to whom you have delegated your work. You may search for users that have similar permissions as you and choose to delegate your work to them. The users will then receive an email and/or notification, and they will be able to log in and perform all of your tasks and activities.

Accessing My Profile

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

Welcome to Grants Online Grants Student. You are logged in to TRAIN2.

Manage Profile [Edit >>](#)

(Comments Exist)

Prefix: Mrs.
 First Name: Grants
 Middle Name:
 Last Name: Student
 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](#)

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)

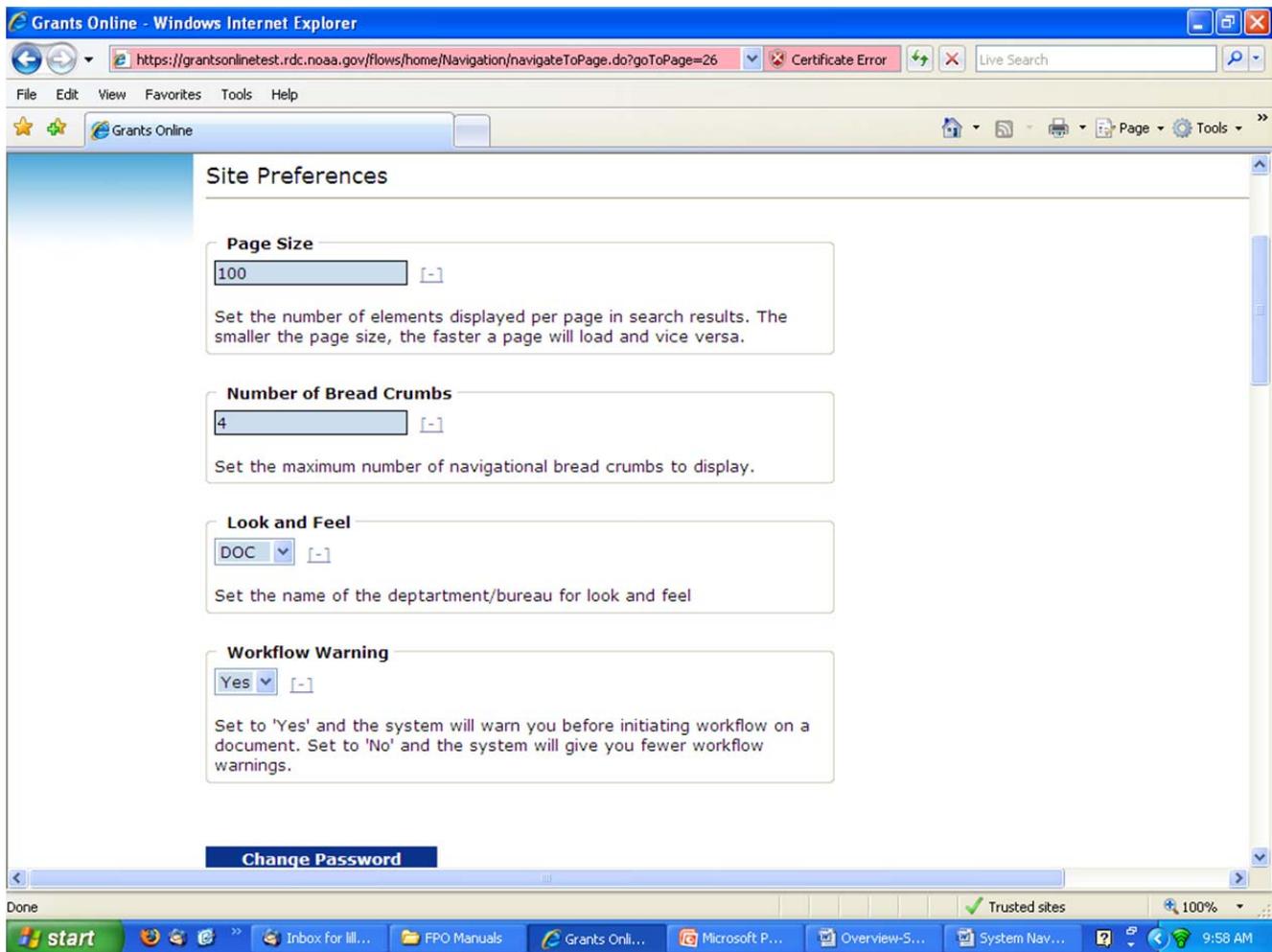
[Done](#)

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.

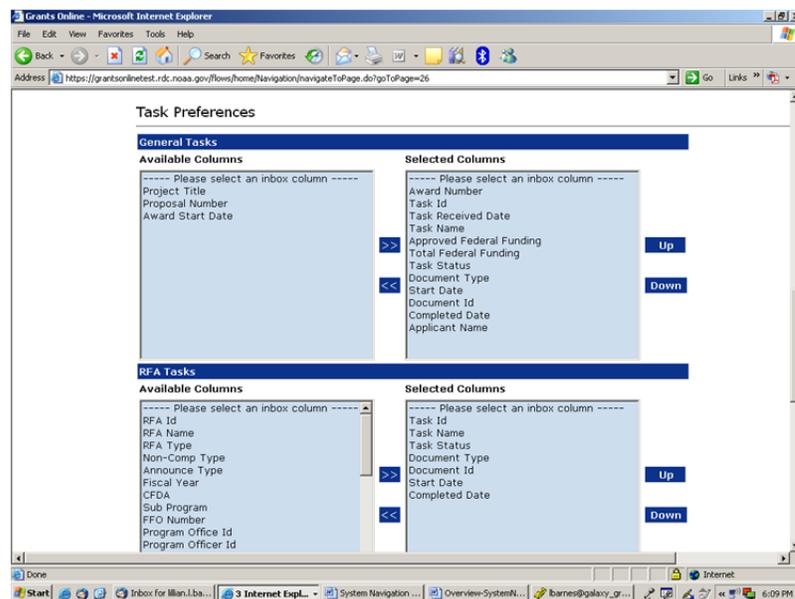
Accessing My Preferences

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.



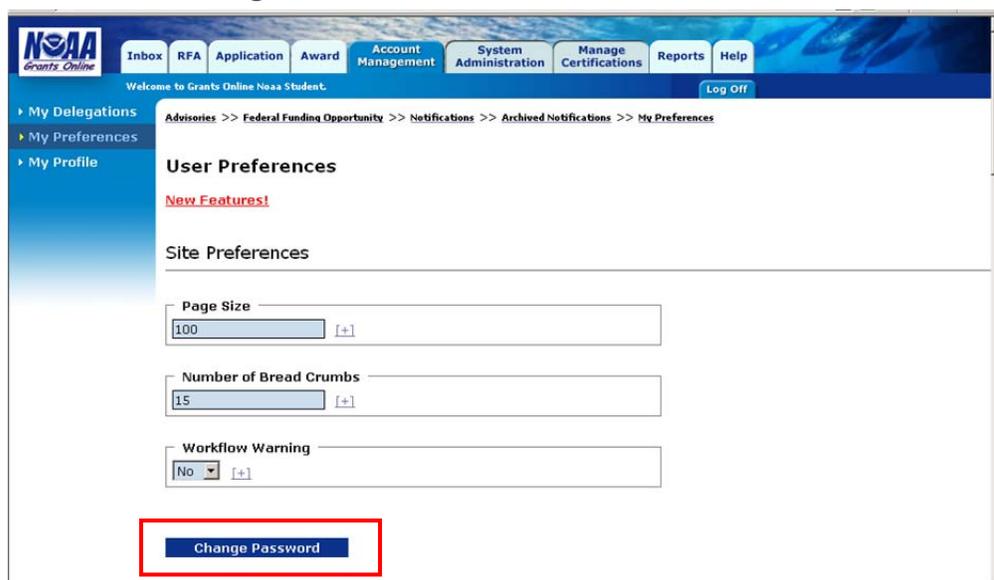
Customizing Tasks

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

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:

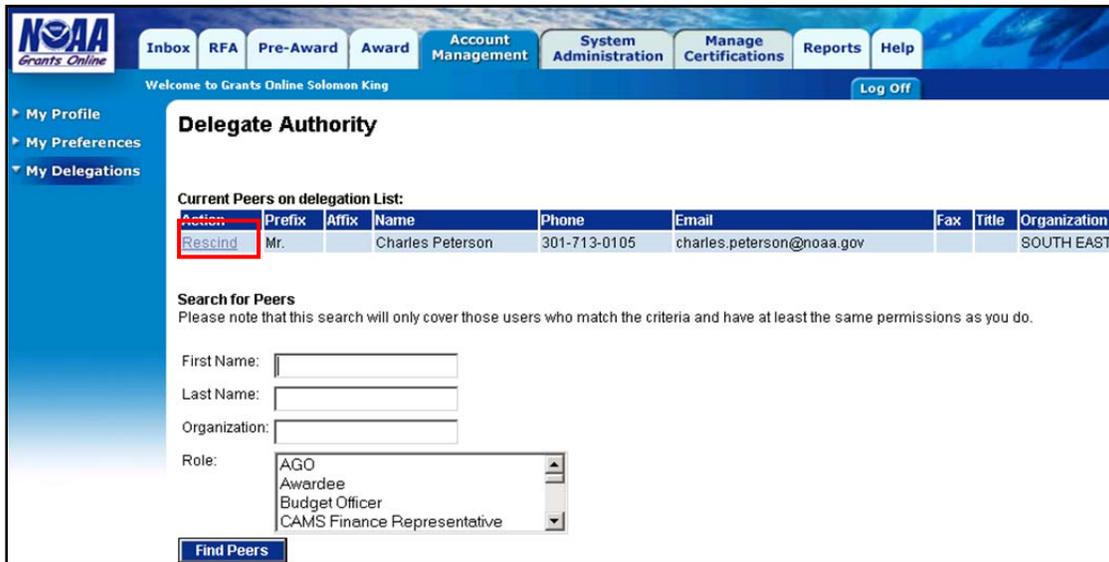
- AGO
- Awardee
- Budget Officer
- CAMS Finance Representative

Search Results

Peterson Charles

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**

February 2013



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 .

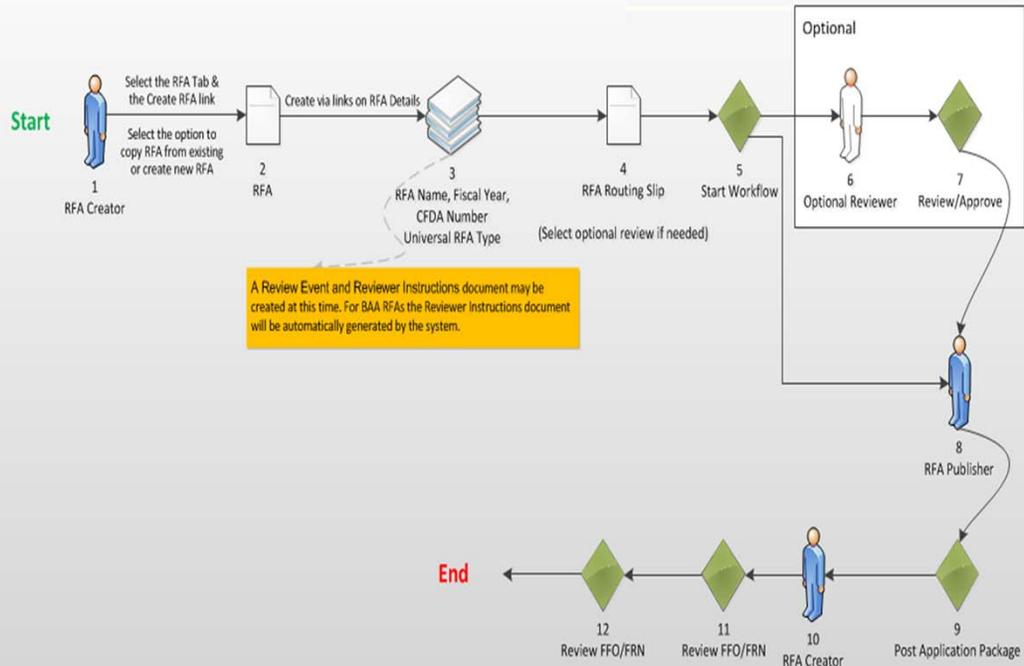


Universal Process – RFA Creation

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

January 22, 2013

Version 4.10



Workflow Diagram:

- 1. **Start** (RFA Creator icon)
- 2. **RFA** (document icon)
- 3. **RFA Name, Fiscal Year, CFDA Number, Universal RFA Type** (stack of documents icon)
- 4. **RFA Routing Slip (select optional reviewer if needed)** (document icon)
- 5. **Start Workflow** (pentagon icon)

RFA Details Form:

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 Officer: Student, Grants
- CFDA Number: 11.999 - Grants Online Training Program
- SubProgram: -Select a Sub Program
- RFA Type: Noncompetitive

RFA Additional Information

- Anticipated Funding Amount for All Recipients: \$
- Application Due Date: (MM/DD/YYYY)
- Anticipated Award Date: (MM/DD/YYYY)

Selected Federal Addresses

No addresses have been selected.

Selected Federal Contacts

No contacts have been selected.

Search Addresses:

- Program Office Name: []
- Street Address: []
- City: []
- State: Please select a state
- Zip: []
- Search

Search Results:

Nothing found to display.

Selected Addresses for this RFA:

- One item found: 1
- Program Office Name | Address
- GOT One Commerce Program Office (OCPO) 20020 Century Blvd, Germantown, MD 20878

Mission Goals Information

No mission goals have been selected.

Application Routing

No Program Officers are assigned to receive applications.

Application Package

An application package has not been selected.

Minimum Requirements

Priority	Requirement Name
1	Received on Time
2	Correct Federal Funding
3	Correct Match
4	Complete Application

Special Award Conditions

No Special Award Conditions are associated with this RFA.

Matching Requirements

No Matching Requirements have been defined.

Attachments

No attachments.

Buttons: Save, RFA Routing Slip - Start Workflow, Cancel

Recipient – High Resolution Systems
DUNS – 602201043

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

The image is a composite of several elements. At the top left is a vertical banner with logos for NOAA, NTA, GRANTS ONLINE, INTERNATIONAL TRADE ADMINISTRATION, and NIBDA. To the right is a flowchart on a yellow background with the following steps:

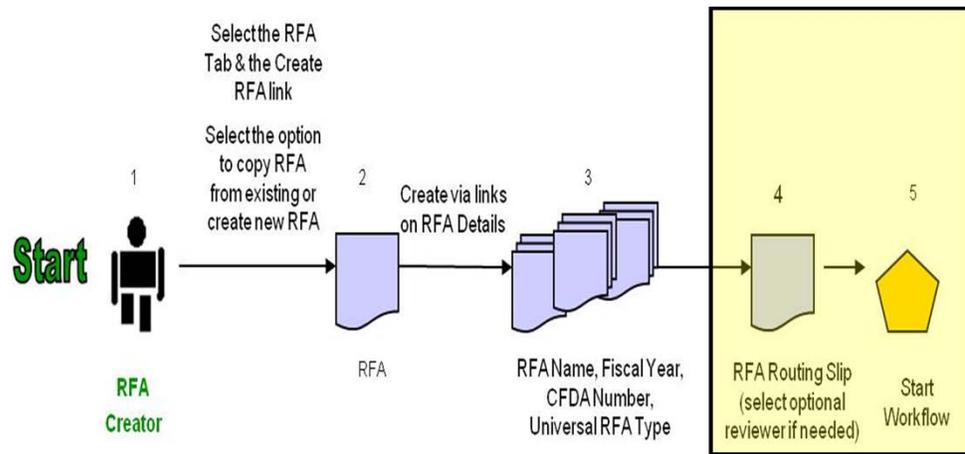
- 1. **Start** (represented by a person icon) labeled **RFA Creator**. Text: "Select the RFA Tab & the Create RFA link".
- 2. **RFA** (represented by a document icon). Text: "Select the option to copy RFA from existing or create new RFA".
- 3. **RFA Name, Fiscal Year, CFDA Number, Universal RFA Type** (represented by a stack of documents). Text: "Create via links on RFA Details".
- 4. **RFA Routing Slip (select optional reviewer if needed)** (represented by a document icon).
- 5. **Start Workflow** (represented by a pentagon icon).

Below the flowchart are three screenshots of the application interface:

- Application Package**: Shows dropdown menus for "Select a Form Family" (SF-424) and "Select a Template" (NOAA - Non Construction v2). It lists "Mandatory Forms" (Budget Narrative Attachment Form, CD-511, Project Narrative Attachment Form, SF-424, SF-424A, SF-424B) and "Optional Forms" (Other Attachments Form, SF-LLL). It also includes an "Attachments" section with instructions and "Save" and "Cancel/Done" buttons.
- Matching Requirement**: Shows a "Statutory Authority" field with a text area containing "Stat Authority goes here.", and "Minimum Cost Share (%)" (5) and "Maximum Cost Share (%)" (20) input fields. It has "Save" and "Cancel" buttons.
- Special Award Condition Details**: Shows a "Name" field with "Programmatic SAC" and a "Description" field with "SAC Description goes here.". It includes a "Spell Check" button and "Save", "Done", and "Cancel" buttons.

At the bottom left of the page is the text "February 2013" and at the bottom right is "Page 6".

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.

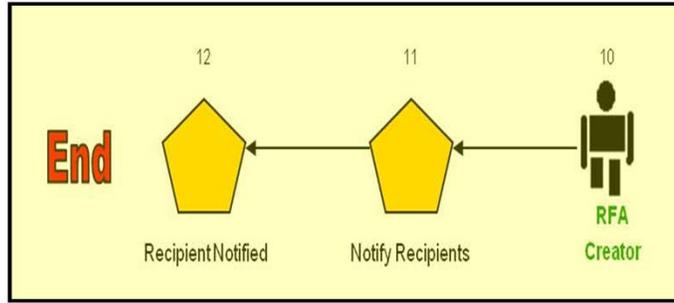
Add Optional Reviewer

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: Status: [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: [Submit](#)

Your Comments:

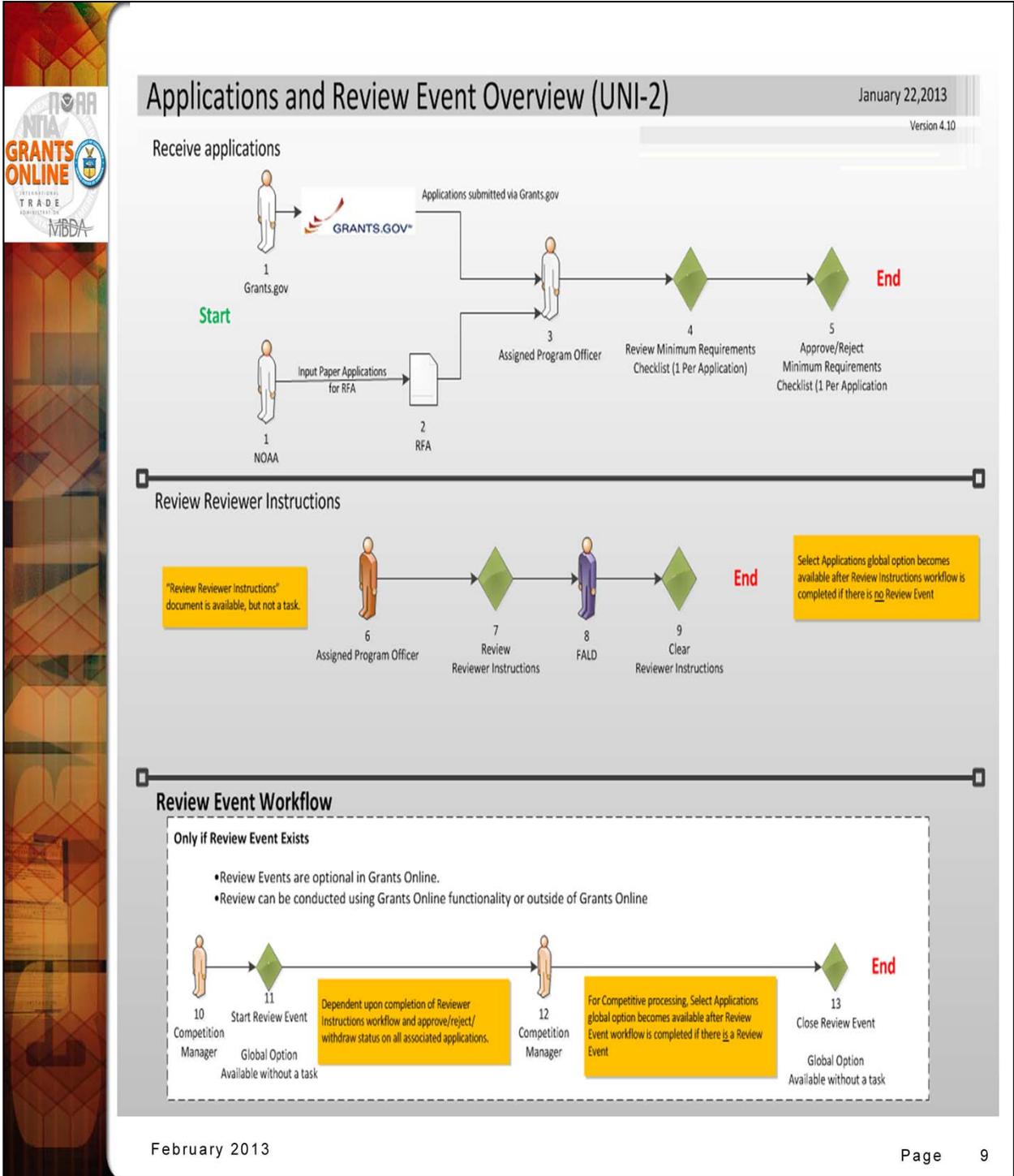
[Spell Check](#)

[Save Comment](#)
[View the routing slip >>](#)

Workflow History

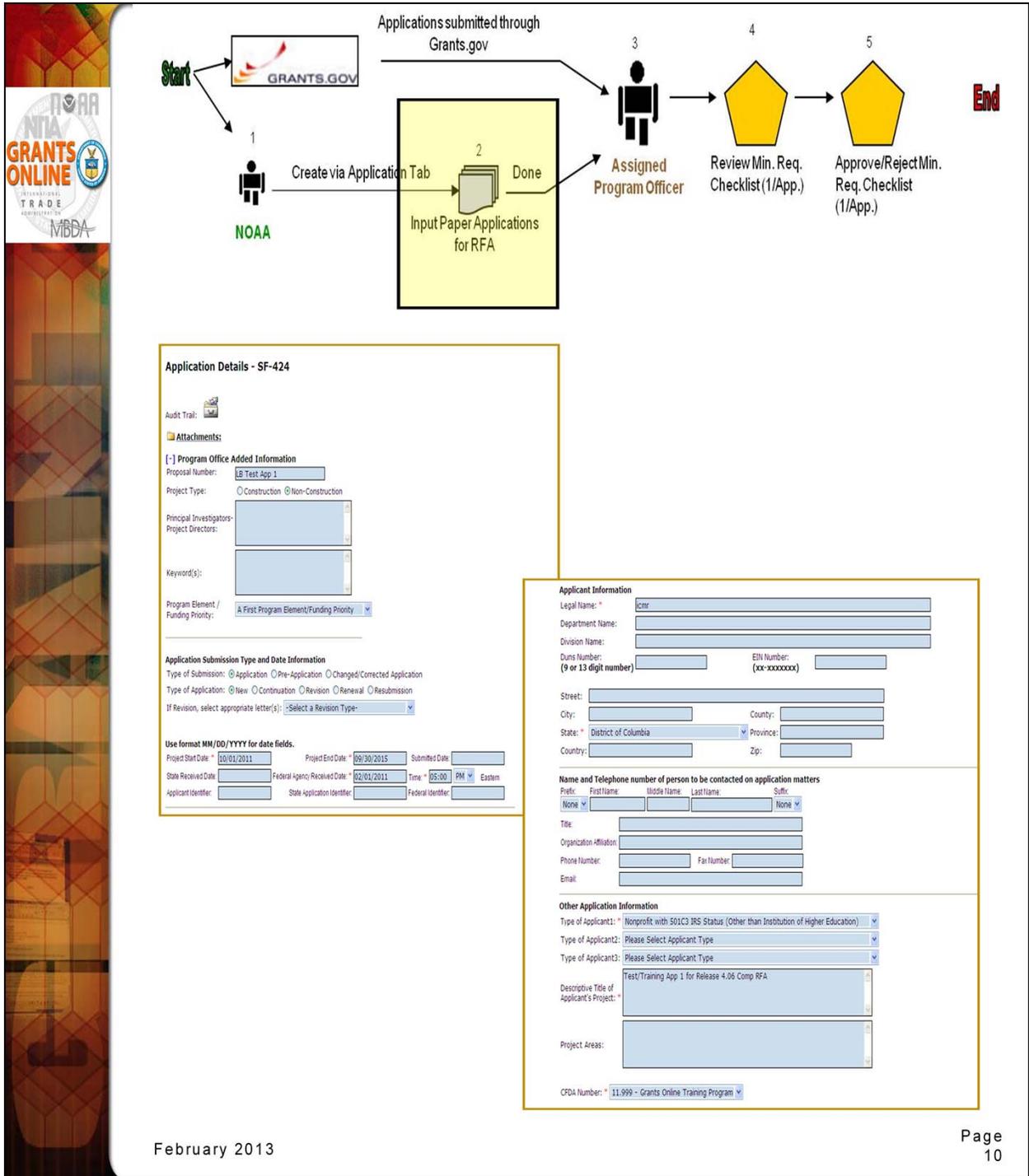
Name	Date Assigned	Date Started	Date Completed	Performer	Role	Action Taken	Current Status	User Comments
Post	02/03/2011	02/03/2011	02/03/2011	Steve	RFAPublisher	ApplicationPackagePosted	Complete	
Application Package	05:37:05 PM	05:37:39 PM	05:37:39 PM	John Drescher				
Approve or Review	02/03/2011	02/03/2011	02/03/2011	Grants Student	RFACreator	InitiateApplicationPackagePosting	Complete	

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.

Applications submitted through Grants.gov

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

NOAA

Name of Federal Agency: NOAA
Applicant Congressional District: _____ **Project Congressional District:** _____
Is the Applicant Delinquent on any Federal Debt? Yes No
Is Application Subject to Review by State Executive Order 12372 Process?
 a. This application was made available to the State under the Executive Order 12372 Process for review on _____
 b. Program is subject to E.O. 12372 but has not been selected by the state for review.
 c. Program is not covered by E.O. 12372.

Authorized Representative
Prefix: None **First Name:** _____ **Middle Name:** _____ **Last Name:** _____ **Suffix:** None
Title: _____
Phone Number: _____ **Fax Number:** _____
Email: _____

Application Funding Details: *
Total Funding: * 500000
Multi Year Award: No
 Nothing found to display.
[Add New](#)

Edit Application Funding Details

Application Total Funding: 500000
Fiscal Year: * 2011 (use format YYYY)
Funding Start Date: * 10/01/2011 (use format MM/DD/YYYY) **Funding End Date:** * 09/30/2015 (use format MM/DD/YYYY)
Federal Funding: * 500,000.00 **Program Income:** _____
Applicant Funding: _____
State Funding: _____
Local Funding: _____
Other Funding: _____
Total Funding: \$500,000.00

Application Funding Details: *
Total Funding: * 500000
Multi Year Award: No

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

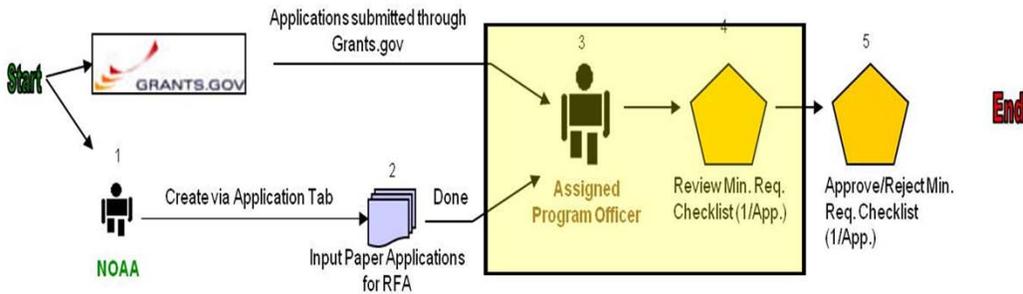
[Add New](#)

February 2013 **Page 11**

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.





2 items found, displaying all items.1

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.

February 2013
Page 12

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.

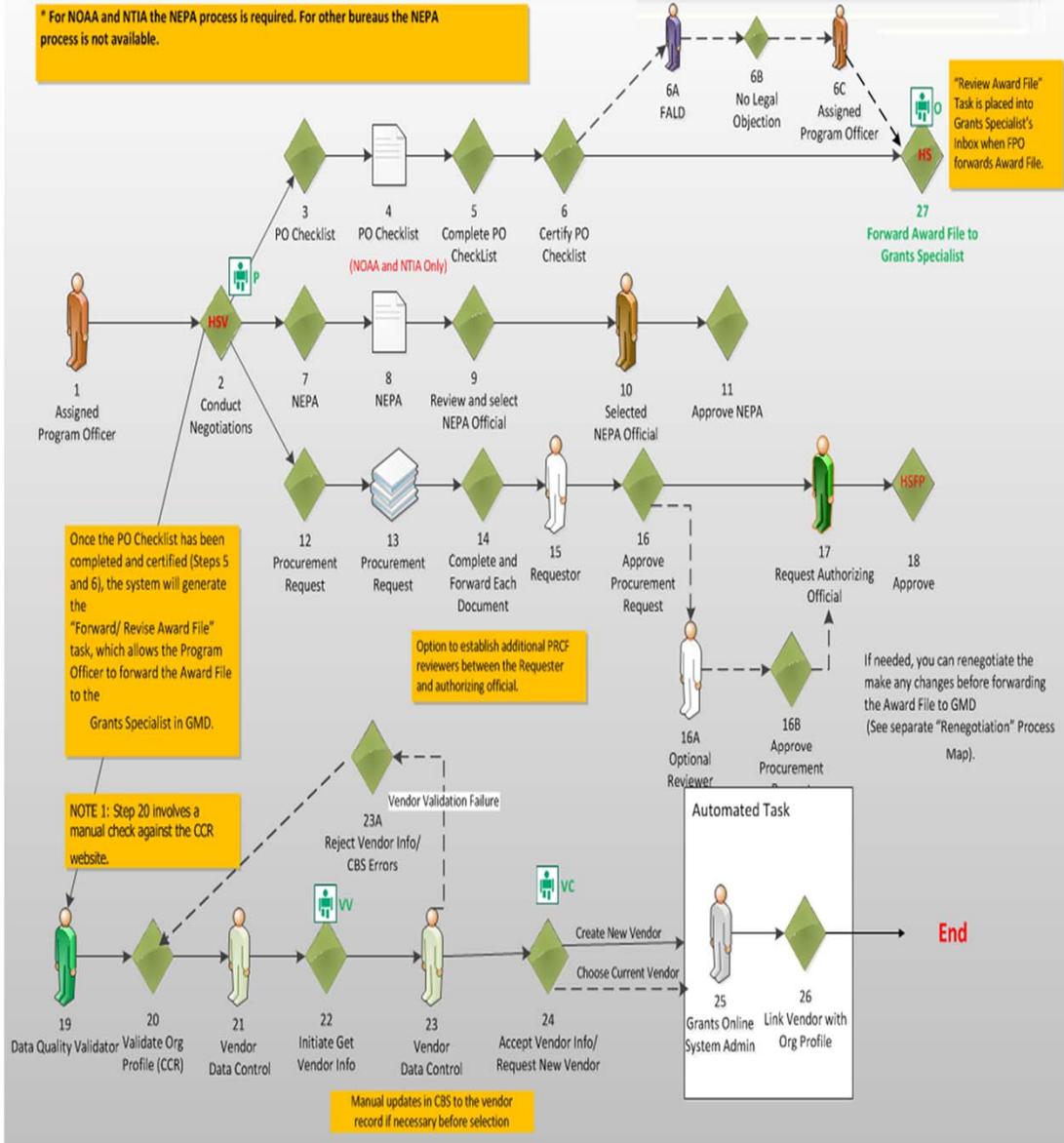


Prepare Applications for Funding Overview (UNI-3)

January 22, 2013

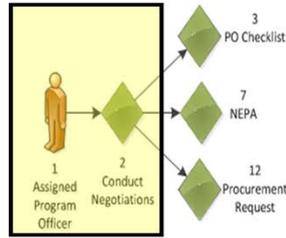
Version 4.10

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



February 2013

Page 13



33 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	Conduct Negotiations	N/A	02/05/2011	Application	LB Universal2 RFA App	Not Started	2199761	1795527			icmr	LB Univ2 App
View	Notifv Recipients	N/A	02/05/2011	RFA	N/A	In	2199760	1795525	02/05/2011		N/A	N/A

Application Submission Type and Date Information

Type of Submission: Application Pre-Application Changed/Corrected Application
 Type of Application: New Continuation Revision Renewal Resubmission
 If Revision, select appropriate letter(s):

Use format MM/DD/YYYY for date fields.

Project Start Date: Project End Date: Submitted Date:
 State Received Date: Federal Agency Received Date: Time:
 Applicant Identifier: State Application Identifier: Federal Identifier:

Applicant Information

Legal Name:
 Department Name:
 Division Name:
 Duns Number: (9 or 13 digit number)

Step 1 : Org Lookup - Find organization's record in database or add if necessary

Select Organization

Enter your search criteria to find the organization.
 Organization Name:
 Address-City:
 DUNS Number:
 EIN Number:
 Address-State:

[Add a new organization >>](#)

2 items found, displaying all items.1

Select	Org ID	Name	Address	DUNS	DUNS+ EIN	Cage Code	ASAP	Active
Select	2002469	Institute for Community Managed Resources (ICMR)	NOAA 123 Main Street, Washington, DC 20000 USA	123456789	987654321	12345	true	
Select	2002490	Institute for Community Managed Resources (ICMR)	NTIA 123 Main Street, Washington, DC 20001 USA	123456789	123456789		true	



- 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

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

Description

Organization Type *

Bureau *

Applicant Type

Organization Name *

Identification

Duns Number +4

(9 digit number) (4 digit number)

EIN Number

(xx-xxxxxxx)

MSI Code [Search MSI List](#)

CAGE CODE:

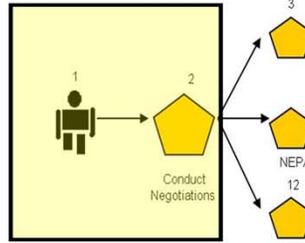
CCR EXPIRATION DATE:

Please press 'Save' before you add attachments

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

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.



33 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	Conduct Negotiations	N/A	02/05/2011	Application	LB Universal2 RFA App	Not Started	2199761	1795527			icmr	LB Univ2 App
View	Notify Recipients	N/A	02/05/2011	RFA	N/A	In	2199760	1795525	02/05/2011		N/A	N/A

b. Program is subject to E.O. 12372 but has not been selected by the state for review.
 c. Program is not covered by E.O. 12372.

Authorized Representative

Prefix: First Name: Middle Name: Last Name: Suffix:
 None None None None

Title:
 Phone Number: Fax Number:
 Email:

Please Associate an Authorized Representative within Grants Online for the Organization mentioned above using the Authorized Representative Lookup button.

[Authorized Representative Lookup](#)

Application Funding Details:

Total Funding: *

Multi Year Award: No

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

[Add New](#)

Award Number:

[Generate New Award Number](#)

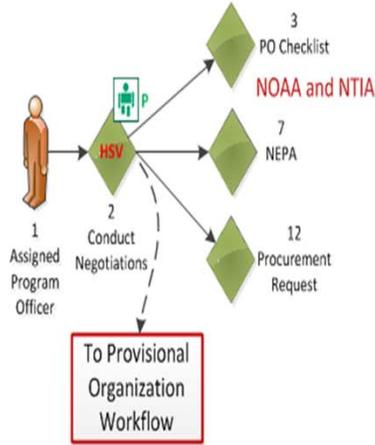
Note: The option to associate this application with an existing award is not available because a recipient organization is not yet associated with the application.

[Save](#) [Save and Return to Main](#) [Cancel](#)

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

Step 3: Generate or associate award number.

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.



Award File In Progress - NA12GOT9990022

Id: 2245442

Status:

Actions:

Your Comments:

Attachments:

Pending Actions X

5 items found, displaying all items.1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action	Status
PO Checklist	2245444	05/22/2012	\$5,000.00	2012	Complete PO Checklist:	Not Started
NEPA	2245446	05/22/2012	\$5,000.00	2012	NEPA Document:	Not Started
Procurement Request and Commitment of Funds	2245443	05/22/2012		2012	Procurement Request and Commitment of Funds:	Not Started
Organization Profile	2245445	05/22/2012	\$5,000.00	2012	Validate Organization Profile:	Not Started
Organization Profile	2245445	05/22/2012	\$5,000.00	2012	Validate Organization Profile:	Not Started

Your Tasks

Document Type: Status:

32 items found, displaying all items.1

View	Task Name	Award Number	Task Date	Document Type	Project Title	Task Status	Document ID	Task ID	Start Date	Completed	Applicant Name	Proposed
View	Procurement Request and Commitment of Funds	NA11GOT9990039	02/02/2011	Procurement Request and Commitment of Funds	Test/Training App 1 for Not Release 4.06 Comp RFA Started		2199722	1795342			Institute for Community Managed Resources (ICMR)	LB Test App 1
View	NEPA Document	NA11GOT9990039	02/02/2011	NEPA	Test/Training App 1 for In Release 4.06 Comp RFA Progress		2199724	1795341	02/02/2011		Institute for Community Managed Resources (ICMR)	LB Test App 1
View	Complete PO Checklist	NA11GOT9990039	02/02/2011	PO Checklist	Test/Training App 1 for Not Release 4.06 Comp RFA Started		2199723	1795340			Institute for Community Managed Resources (ICMR)	LB Test App 1
View	Assignments Number/Recipient		01/04/2011	Application	Test App for RFA Process Maps	All Progress	2199520	1794972	01/23/2011		Institute for Community	LB Test App 1

(NEPA - NOAA, NTIA Only)

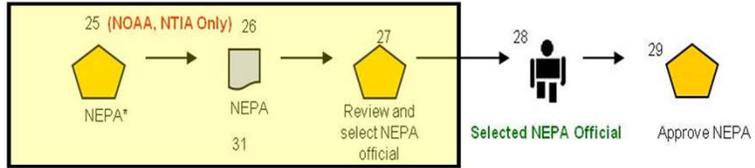


- In the Universal application process, the Provisional Organization workflow is initiated at the same time as the PO Checklist, NEPA, and Procurement Request when the FPO selects “Negotiations Complete”. However, the Organization Profile task for the Provisional Organization Workflow is not in the FPOs 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.



Attachments:

No attachments.

Add new Attachment [±]
 Any changes to information on this page should be saved before adding or removing attachments.
[Large File Guidance](#)

[Guidance - \(NOAA FY 2009 Workshop: Presentations - Day1 pp. 107-121\)](#)

[NOAA Guidance - requires NOAA email address and password](#)

a.) Level of Review

Indicate below the level of environmental review that has been conducted by the Responsible Program Manager for the proposed action in accordance with the applicable provisions of the NOAA Administrative Order 216-6 entitled, "Environmental Review Procedures for Implementing the National Environmental Policy Act"

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.) Mitigating Measures

If either an EA or EIS was completed, did the analysis of the environmental impacts require the implementation of one or more mitigation measures?
 NO [Special Award Condition](#)
 YES

c.) Post Award NEPA Review Process

Does the proposal include funding for one or more projects that have not yet been identified and therefore NEPA review cannot be completed?
 NO [Special Award Condition](#)
 YES

Please Select a NEPA Official for routing purposes:

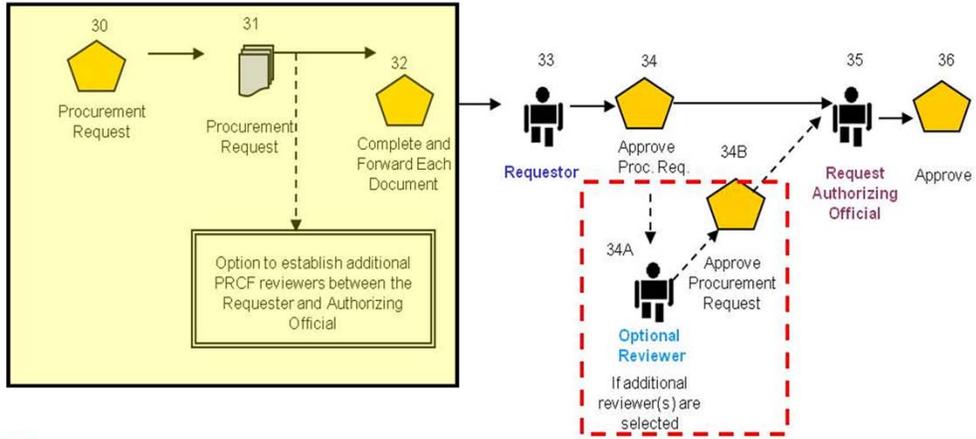
Save **Save and Return to Main** **Cancel**

Categorical Exclusions

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 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, and cumulatively have significant impacts on the human environment (e.g., actions with limited scope).
<input type="checkbox"/> 6.03b.2	Examples of Restoration Actions Eligible for a CE



- 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*



Federal Share: \$500,000.00

Request Authorizing Official: *
None Selected.
[Search](#)

Additional Reviewers:
Nothing found to display.
[Add](#)

(Please note, you must press 'Save and Return to Main' for the Route to be

Requestor: *
None Selected.
[Search](#)

Invoice Address: * Requisition Number: *

The ACS is valid

Validated: true

Bureau (xx): * 14

Fund (xx): * 2000

Fiscal Year (yyyy): * 2013

Project Task: SAE0000 - SAE

Program Code: 52 - 30 - 00 - 000

Organization: 10 - 01 - 0002 - 00 - 00 - 00 - 00

Object Class: 41 - 11 - 00 - 00

Amount: * \$2,000.00 Prior Year Fund: No

[Save](#) [Save and Add More ACS Lines](#) [DWValidate](#) [Cancel/Done](#)

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DW	Validated
14	2000	2013	10-01-0002-00-00-00-00	52-30-00-000	SAE0000-SAE	41-11-00-00	\$2,000.00	N	Yes	

Accounting - ACS Lines *

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Validated	Action
14	37	2011	50-42-0000-00-00-00-00	03-03-02-000	D8R3BSG-PO0	41-12-00-00	\$125,000.00	Yes	Edit Delete

[Add New ACS Line](#)

PRCF Total for this Award action: \$125,000.00

Total Federal funds authorized for this Award action: \$500,000.00

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



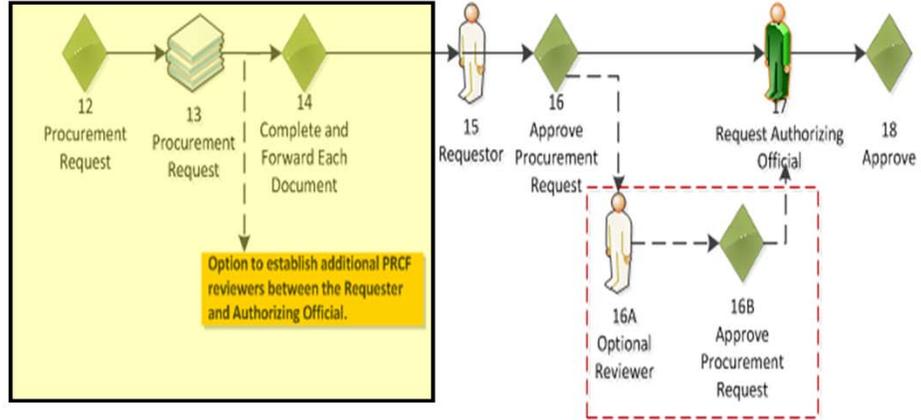
- Next, select the “Procurement Request” task from the Inbox and then select Complete Procurement Request and Commitment of Funds from the Action dropdown box. Note that this Procurement Request is only for the first year of funding. We will discuss how to fund the out-years during the Post Award class.

- 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.



Accounting - ACCS Lines *
 No CD435 ACCS Lines have been defined.
[Add New ACCS Line](#)
 PRCF Total for this Award action: \$0.00
 Total Federal funds authorized for this Award action: \$5,000.00

[Procurement Request Official Comments](#)

Save Save and Return to Main **CBSValidate** Cancel

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

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 - Org4 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;

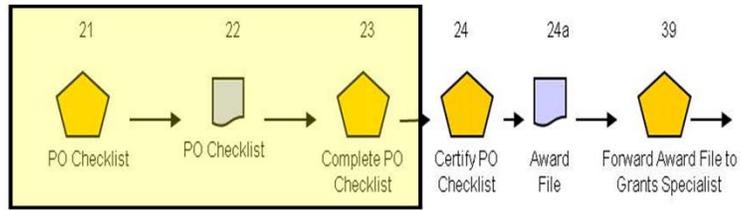
Cancel

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.



- 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.



PO Checklist - NA11GOT9990039

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

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

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

Project Description/Abstract* [Guidance](#)

General Award Information
Application Organization: [icmr2](#) State: DC
Applicant's EIN and DUNS numbers have been verified:*

Grant Type* [Guidance](#)
 Grant
 Cooperative Agreement
If Cooperative Agreement, enter [Cooperative Agreement Special Award Condition](#)

Matching Requirements* [Guidance](#)

a. Federal Share 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	Edit Del

[Add New](#)

Analysis of Matching Requirements
Negotiated Federal Share: \$500,000.00
Total Federal Share (from Matching Requirements): \$500,000.00
Negotiated 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 (OMB Circular A-110, Future 2 CFR §215) and will the funding for the proposed award, or any part of the proposed award, be used to conduct research? NO YES Not Answered



- 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.

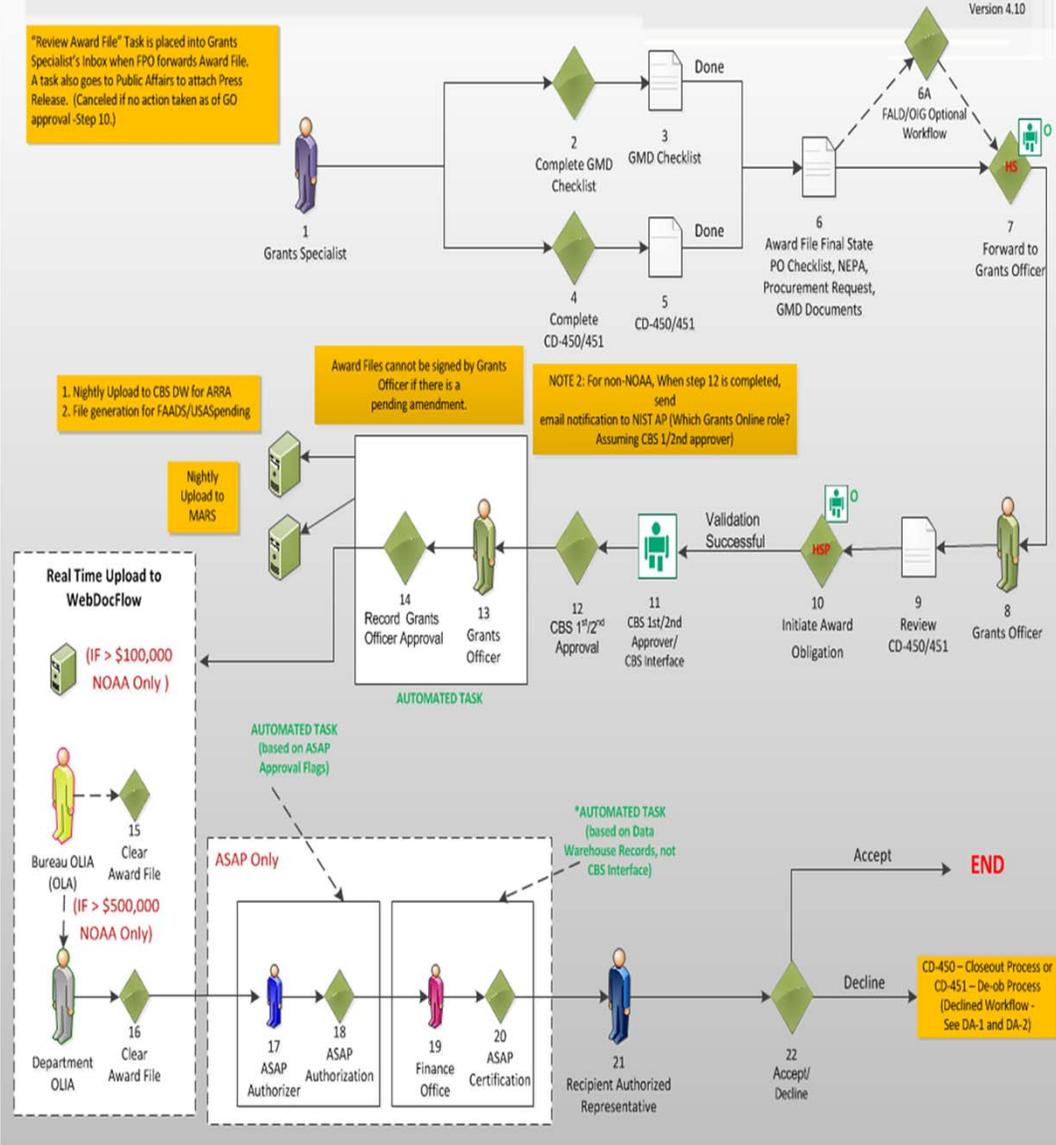
Grants Management Division Process

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

January 22, 2013

Version 4.10

"Review Award File" Task is placed into Grants Specialist's inbox when FPO forwards Award File. A task also goes to Public Affairs to attach Press Release. (Canceled if no action taken as of GO approval - Step 10.)



February 2013

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- **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 Number: 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**

February 2013

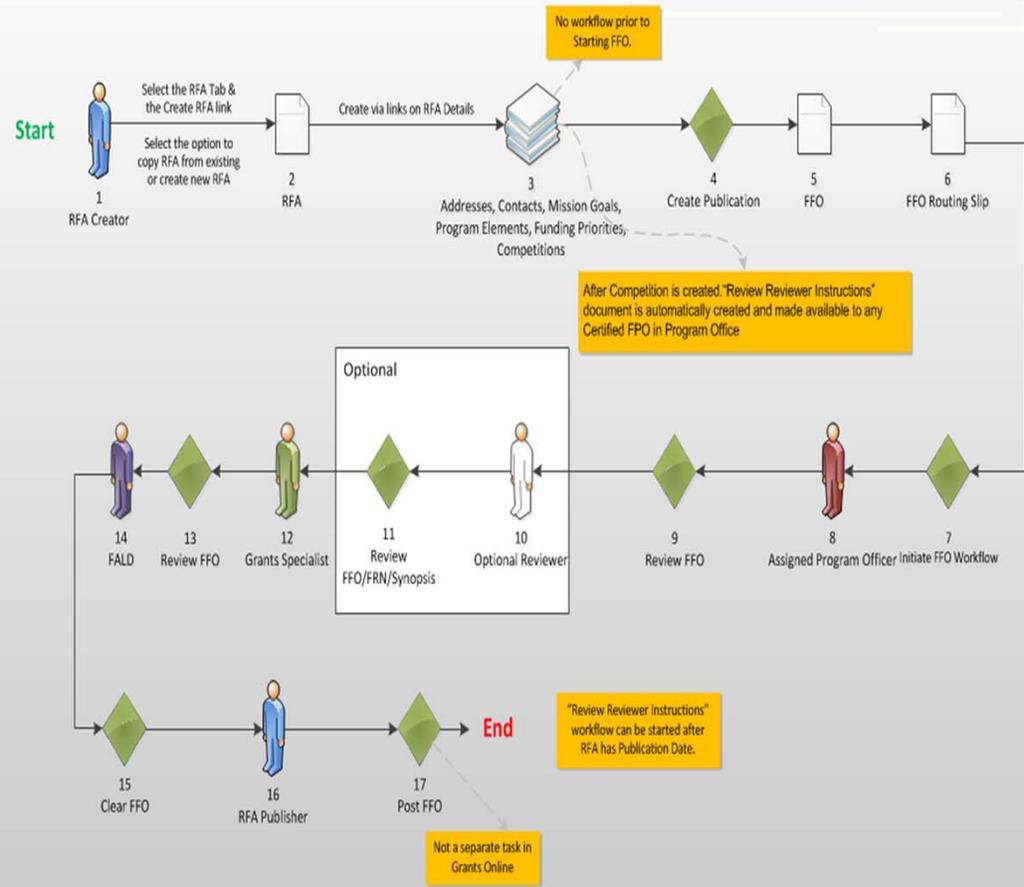


Competitive Process – RFA Creation

Create & Review RFA and Publish FFO Overview (COMP-1)

January 22, 2013

Version 4.10





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:

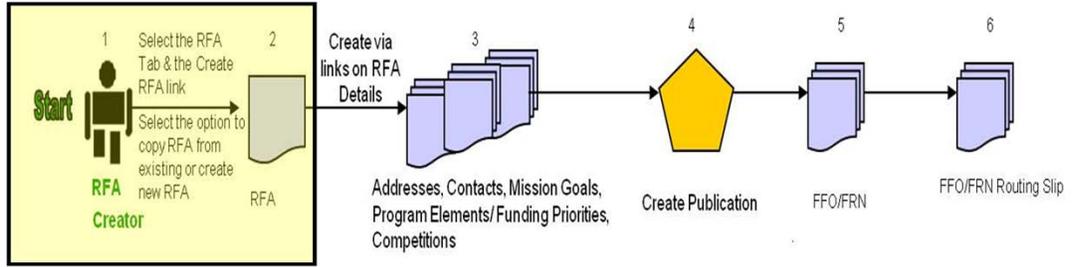
1. Assigned Program Officer on the RFA needs to be a “Certified FPO” in order to forward the documents through workflow.

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*



Create RFA

Choose Type:

Competitive Broad Agency Announcement

Congressionally Directed Congressionally Mandated

Formula/Allotment Institutional

Noncompetitive

Choose Action:

Create New from Scratch Create New from Existing

Create RFA

RFA Header Information

Document ID 2147932

RFA Name* Sample RFA for FPO Training

Fiscal Year* (YYYY) 2009

Announcement Type Initial

Anticipated Publication Date* (MM/DD/YYYY) 04/24/2009 **** Competitive Only**

Funding Opportunity Number NOAA-GOT-ONPO-2009-2001984

Line Office* NOAA Grants Online Training (GOT)

Assigned Program Office* GOT One NOAA Program Office (ONPO) v

Assigned Program Officer* Student, NOAA v

CFDA Number* 11.499 - NOAA Grants Online Training v

Sub Program -Select a Sub Program- v

RFA Name* [text box]

Fiscal Year* (YYYY) [text box]

Announcement Type Initial

Anticipated Publication Date* (MM/DD/YYYY) [text box] **** Competitive Only**

Line Office*

Assigned Program Office* -Select a Program Office- v

Assigned Program Officer* -Select a Program Officer- v

CFDA Number* -Select a CFDA #- v

Sub Program -Select a Sub Program- v

Save Cancel



- 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

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
6 FFO/FRN Routing Slip

RFA Supplementary Information
 Anticipated Funding Amount * \$
New Program *
 This **IS NOT** a new program. A Federal Register Notice **IS NOT REQUIRED** unless anticipated funding is \$100M or greater.
 This **IS** a new program. A Federal Register notice **IS REQUIRED**.
 Anticipated Award Amount \$ Min Max
 Anticipated Number of Awards

Selected Federal Addresses *
 No addresses have been selected.
[Add/Edit](#)

Selected Federal Contacts *
 No contacts have been selected.
[Add/Edit](#)

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

Program Elements/Funding Priorities *
 No Program Elements/Funding Priorities Available
[Add/Edit](#)

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

Search Addresses
 Program Office Name: **1**
 Street Address:
 City:
 State:
 Zip:
 2

Search Results
 Nothing found to display.
 3

Selected Addresses for this RFA
 Nothing found to display.

May change on future release. For now always select top radio button to indicate FRN is NOT required.

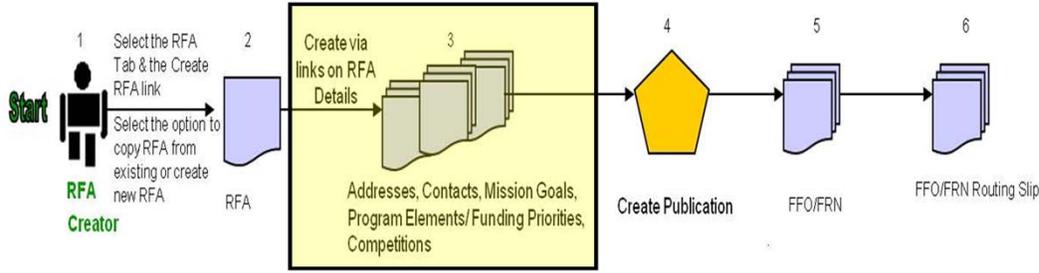
February 2013 Page 8

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.



**NTIA
GRANTS
ONLINE**
NATIONAL TRADE ADMINISTRATION
MIBDA



1 Select the RFA Tab & the Create RFA link
Select the option to copy RFA from existing or create new RFA

2 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

Selected Addresses *
No addresses have been selected.
[Add/Edit](#)

Selected Contacts *
No contacts have been selected.
[Add/Edit](#)

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

Program Elements/Funding Priorities *
No Program Elements/Funding Priorities Available
[Add/Edit](#)

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:

Description of Program Element "A" goes here.

45 / 4000 [Spell Check](#)

[Save](#) [Cancel](#)

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

[Reorder](#)

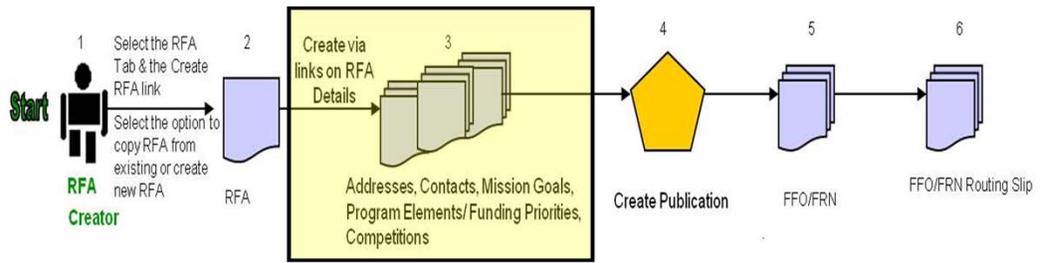
[Add New](#)

[Done](#)

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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.



Competition Name * Fiscal Year *

Competition Type * Group Individual Qualification

Assigned Program Office *

Competition Manager *

Save **Cancel**

Competition Name * Fiscal Year *

Competition Type * Group Individual Qualification

Assigned Program Office *

Competition Manager *

Selecting Official *

	Min	Max
Anticipated Federal Funding for this Competition *	<input type="text"/>	<input type="text"/>
Required Federal Funding (in Dollars) per Application	<input type="text"/>	<input type="text"/>
Cost Share (%) per Application	<input type="text"/>	<input type="text"/>

Anticipated Competition Schedule

Pre-Application Due Date Time: Eastern

Application * Due Date Time: Eastern

Anticipated Award Date * Days after Application Due Date

View Anticipated Competition Schedule

Review Criteria Type: * Agency Standard Fellowship [Guidance](#)

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

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

Minimum Requirements *

Priority	Requirement Name
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
7	Complete Application

[View/Edit](#)

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

Review Events *
No Review Events available.
[View/Edit](#)

NOTE:
Review Events are required for the Competitive Process but can be done outside of Grants Online..

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



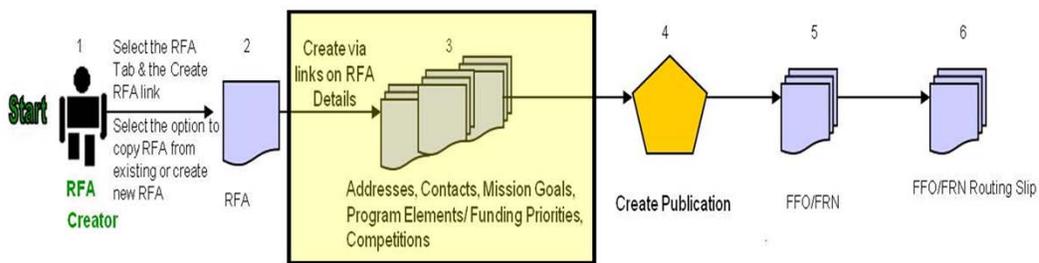
- The RFA name is repeated as the Competition name, make changes as appropriate. Enter the Fiscal Year. (There can be competitions for more than one fiscal year in a single RFA.) In most cases you will select Group for Competition Type. (See explanation of Competition Types below.)
- Group – All applications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

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**NTA
GRANTS
ONLINE**
INTERNATIONAL
TRADE
ADMINISTRATION
MBDA



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
6 FFO/FRN Routing Slip

Independent Individual Merit Review
[Guidance](#)

Review Event Name:

Review Event Manager:

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 on Med

Not Scored Criteria: Yes No

Bonus Points: Yes No

Anticipated Review Start Date: Anticipated Review End Date:

Points Scoring Criteria

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

[Add New >>](#) [Reorder >>](#)

[FFO Evaluation Criteria Report](#)

Sample Individual Merit Review Event details page using "Points"

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.)

Start **RFA Creator**

- 1 Select the RFA Tab & the Create RFA link
Select the option to copy RFA from existing or create new RFA
- 2 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

Competition
Id: 2199731
Status:
Action:
Your Comments:

Workflow Analysis
The following needs to be completed before applications can be selected for competition:
- The RFA must be published.
- Reviewer Instructions must be reviewed by FALD.
- There must be applications that have passed minimum requirements.

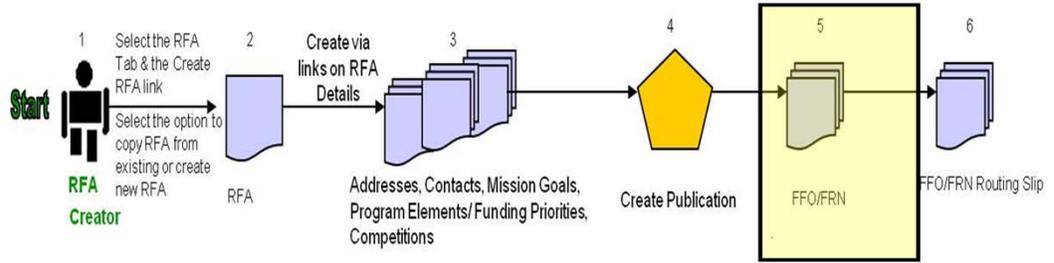
RFA
Id: 2199641
Status:
Action:

Your Comments:

Attachments:

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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.



Federal Funding Opportunity

Please click on this icon to view the audit trail on this FFO:

Please read the appropriate [guidance documents](#) before filling out the fields below.

Regulatory Information Number (RIN)

Executive Summary

Federal Agency Name:

Funding Opportunity Title:

Announcement Type:

FFO Number:

Catalog of Federal Domestic Assistance (CFDA) Number:

Dates:

Funding Opportunity Description:

Full Text of Announcement

I. Funding Opportunity Description

- A. Program Objectives
- B. Program Priorities *(empty)*
- C. Program Authority *(empty)*

II. Award Information

- A. Funding Availability *(empty)*
- B. Project/Award Period *(empty)*
- C. Type of Funding Instrument *(empty)*

III. Eligibility Information

**Grants Online
Federal Funding Opportunity,
and
Federal Register Notice
Document Creation Assistance**

Last Update: 05/12/2011

Every competitive announcement MUST have a Federal Funding Opportunity (FFO). The FFO will be available on Grants.gov along with the application package. It will be the primary reference document for applicants. All grant programs must continue to develop FFO announcements, which incorporate all substantive grant provisions, such as application requirements, evaluation criteria and selection procedures, and to make it available on Grants.gov. The Financial Assistance law Division (FALD) will forward to the Office of the Assistant General Counsel for Legislation and Regulation (L&R), those FFO announcements with funding that exceeds \$100 million and announcements for new grant programs, so that L&R may coordinate the review and clearance of those announcements with the Office of Management and Budget (OMB).

The change in policy does not supersede any statutory or regulatory requirements to publish a Notice of Funding Availability, or other similar notice, in the Federal Register. Agencies must still publish such notices if required to do so by any law or regulation.



- 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.

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Routing Slip

Assigned Program Officer
 The Assigned Program Officer must be on the routing slip. The Assigned Program Officer is set on the RFA details page.
 Participant Name
 AssignedProgramOfficer Grants Student00

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](#)

Grants Specialist
 The lead Grants Specialist assigned to the line office and CFDA number associated with this RFA is listed below and will receive a task to review this document. The Grants Management Division has the ability to reassign the task at their discretion.
 Participant Name
 GrantsSpecialist NOAA Grants Specialist

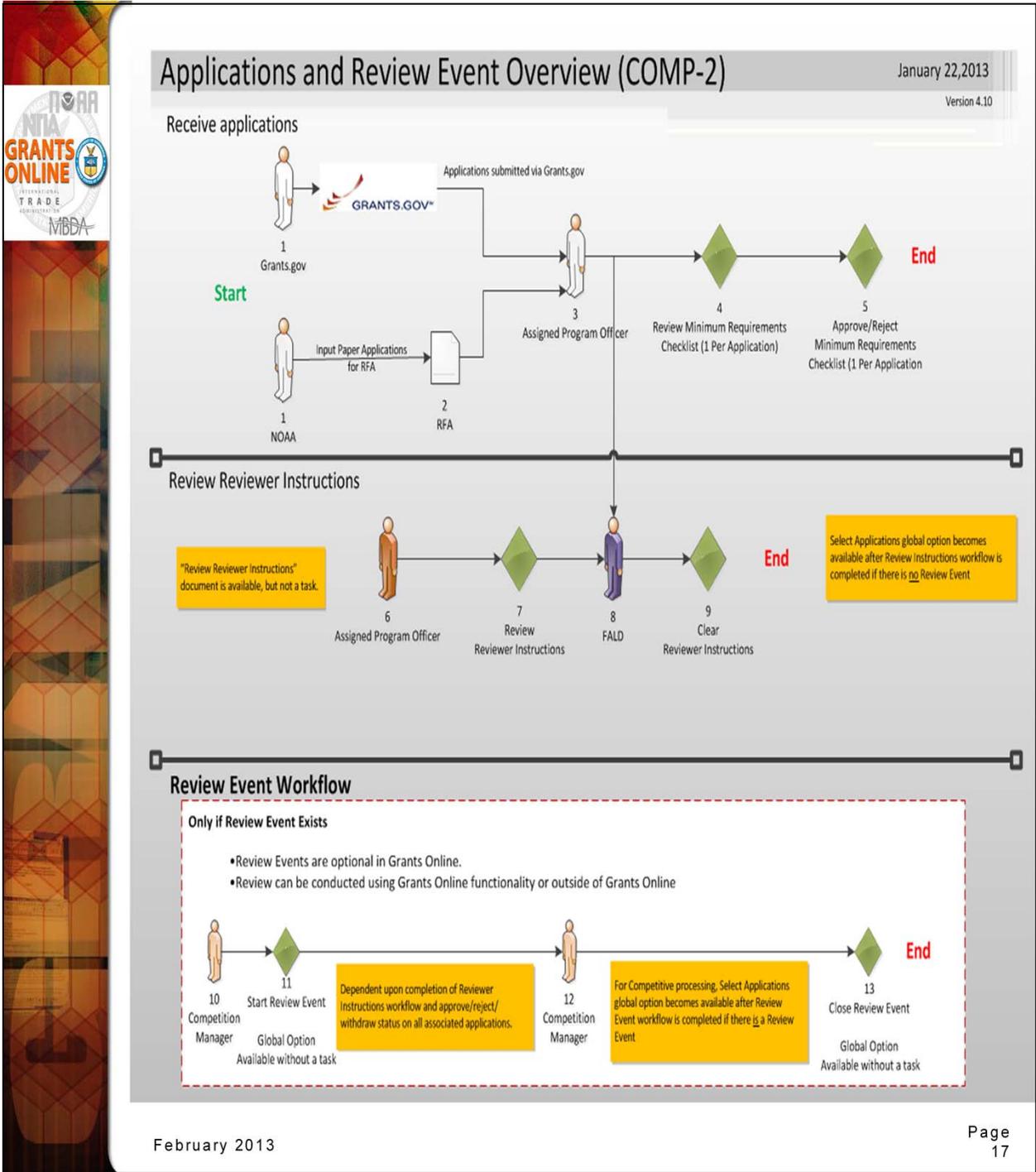
Federal Assistance Law Division (FALD)
 All members of FALD will receive a task to review this document. One FALD user will claim ownership of the review task and all further FALD tasks for this document will be assigned to that person.
 Participant Name

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 posts the FFD on Grants.gov for competitive announcements. This person also posts the application package at Grants.gov for competitive and non-competitive announcements.
 Participant Name

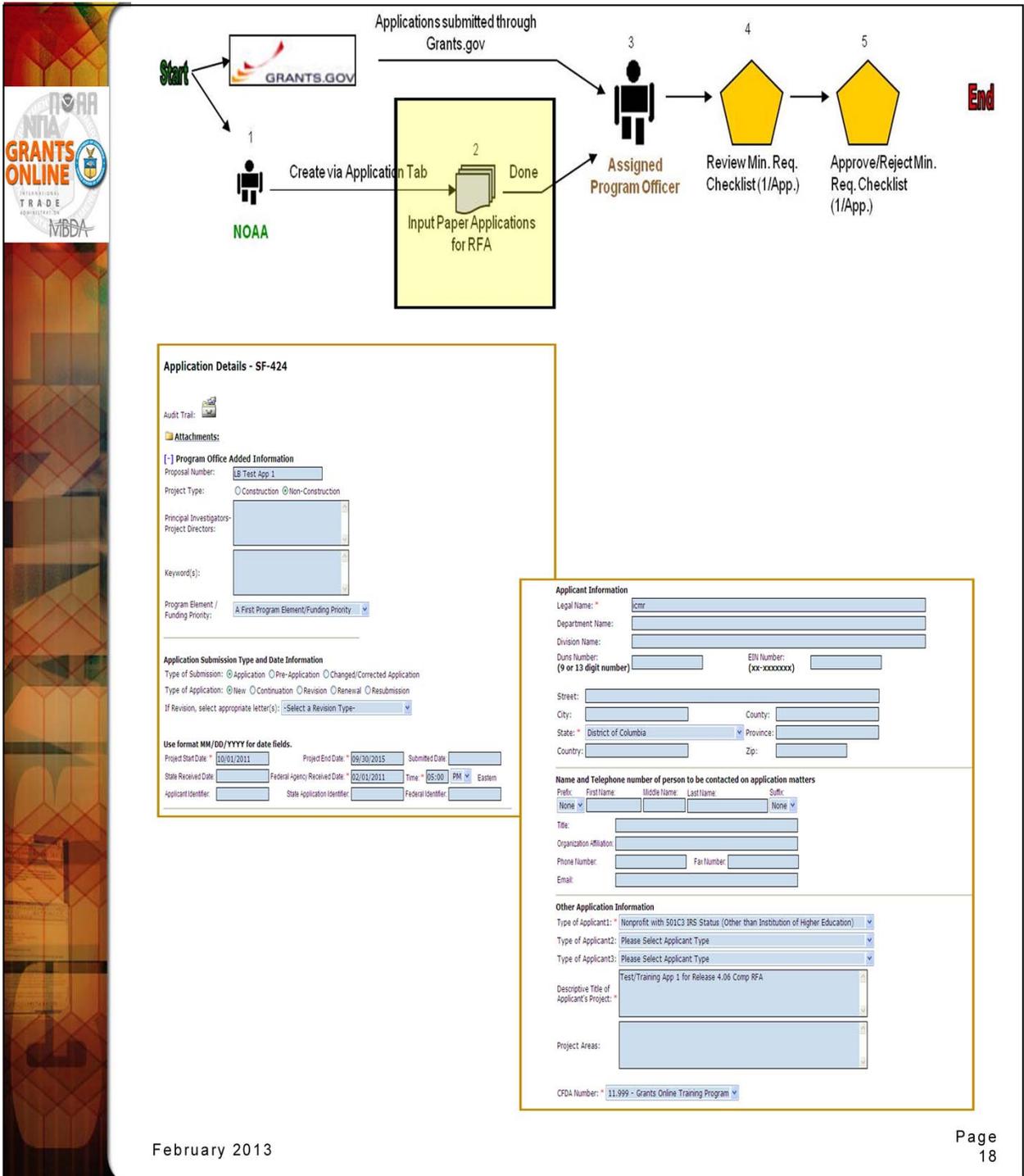
[Save Route](#) [Start Workflow](#) [Cancel](#)

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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.

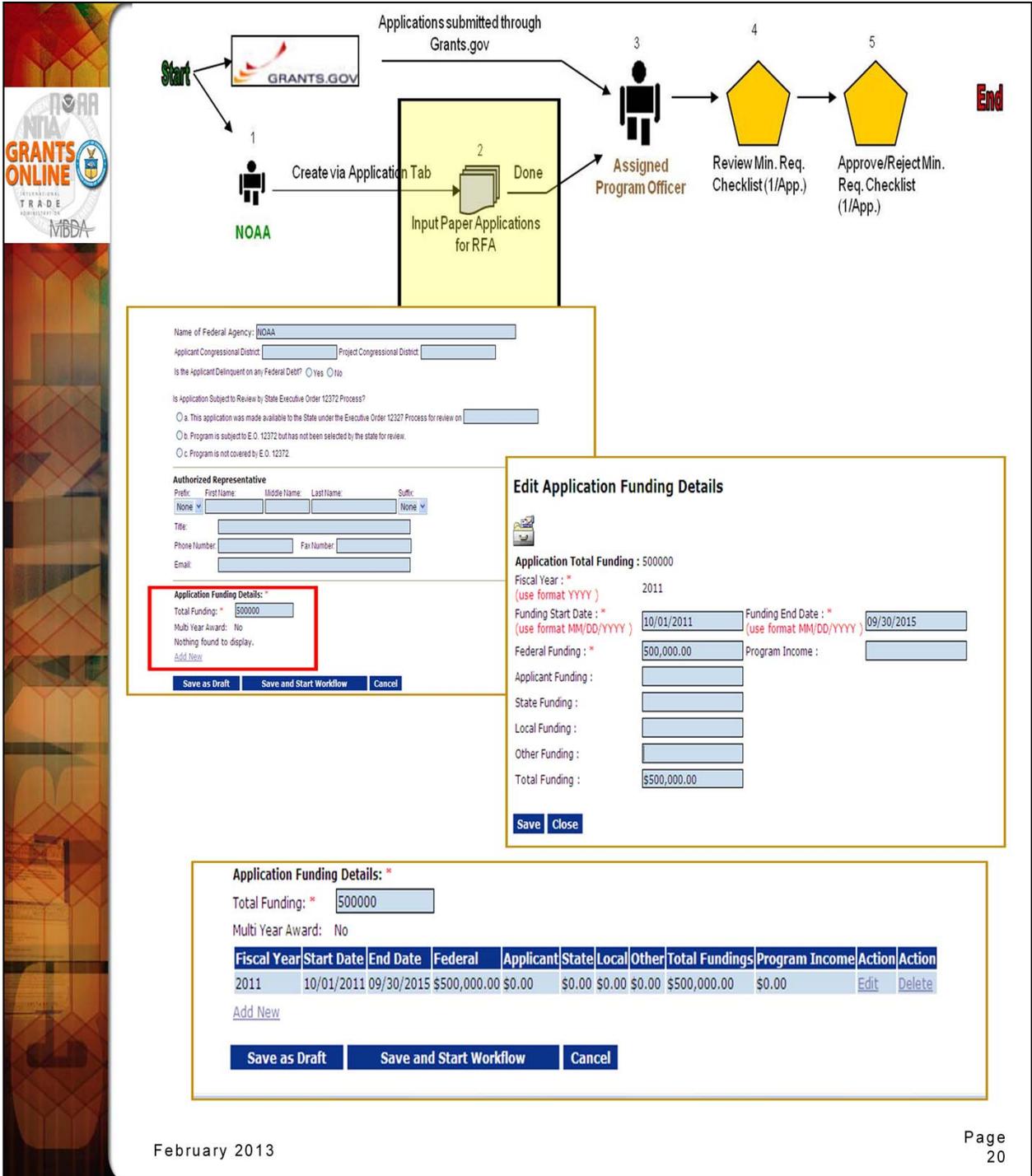




- To start, select the “Input Paper Applications” menu item under the Applications tab. The data on the Application Details screen will already be filled in if the application comes in from Grants.gov. However, if a paper application is received by the Program Office the data must be entered on this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

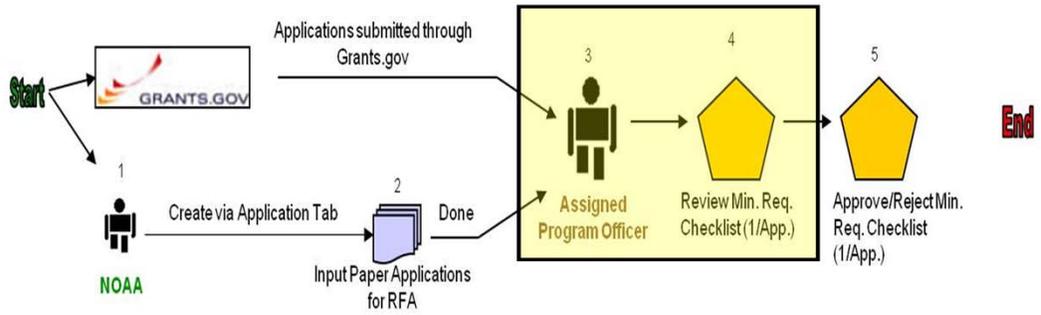
- The Application Details screen contains most of the fields found on an SF-424. After entering required fields click “Save as Draft”. If you have missed any required fields you will get an error message with guidance regarding the missing fields.

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





- The “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.



Your Tasks

Document Type: Status: [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
View	Review Min. Req Checklist	N/A	02/01/2011	Application	Test/Training App. 1 for Not Release 4.06 Comp RFA Started		2190712	1795207			icmr	LB Test
View	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	Met Requirement ?	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"/>

Does the non-Federal funding provide at no more than the maximum match percentage of the total funding?

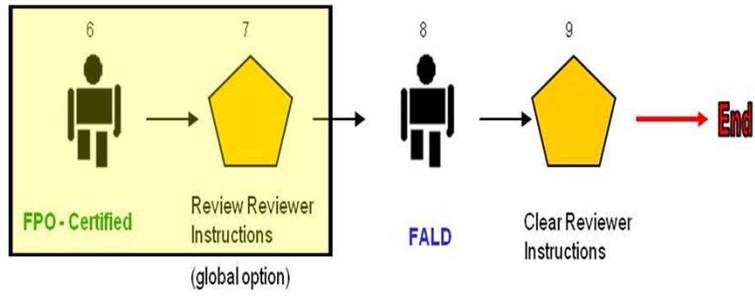
Does the application contain all of the required forms?

Overall Comments:

[Save](#) [Save and Return to Main](#) [Cancel](#)



- 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
Test Attachment 1.pdf	Test 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.

Save

Logistical Reviewer Instructions

Attachments:

Name	Short Description	Created Date	Internal Use Only	FALD Reviewed	Logistical	Remove
Test Attachment 2.doc	Test 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.

Done

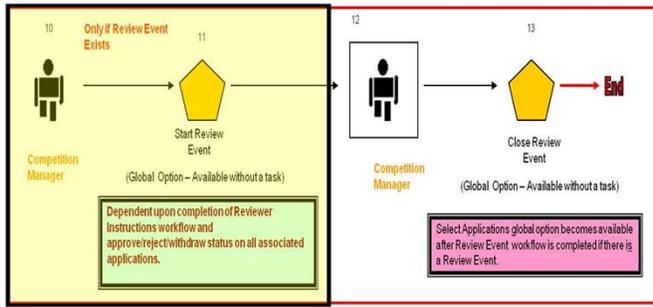
Note: The Logistical Reviewer Instructions may only be used for attaching instructions related to travel and meeting dates, times and locations, as well as meeting requirements and reimbursement instructions. DO NOT attach any instructions on how to how to conduct the review, review priorities, etc.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



- **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.**



Independent Individual Merit Review

Id: 2253410
Status:

Action:

Your Comments:
 Start Review Event
 View Review Event Details

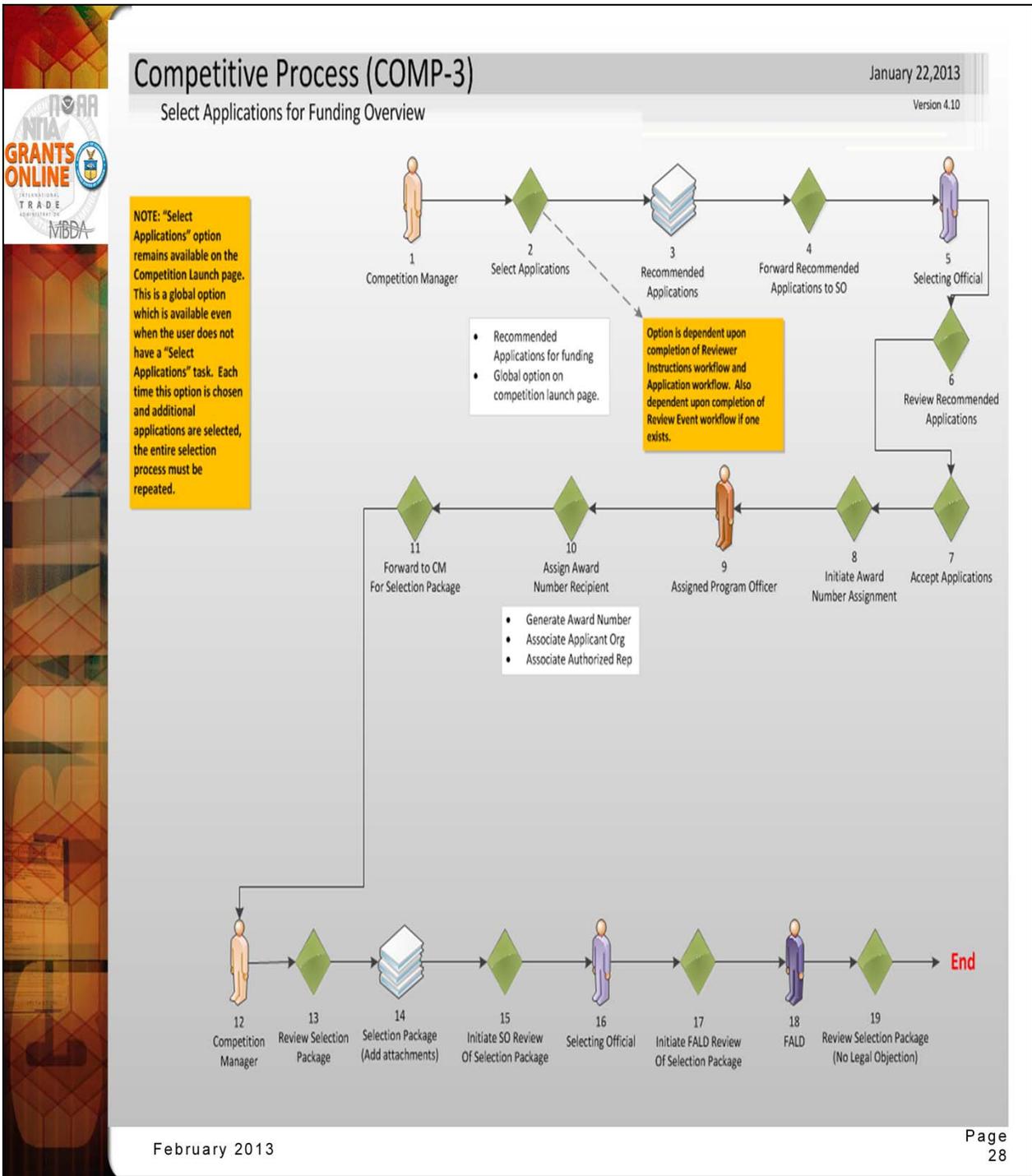
Id: 2253411
Status: ManageReviewEvent - Not Started

Action:

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



- 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 Manger 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.

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Competition Manager

11



Forward to CM for Selection Package

10



Assign Award Number/Recipient
-GENERATE AWARD NUMBER
-ASSOCIATE APPLICANT ORG
-ASSOCIATE AUTH REP

9



Assigned Program Officer

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	Assign Award Number/Recipient	N/A	02/02/2011	Application	Test/Training App 1 for Not Release 4.06 Comp RFA Started		2199712	1795321			icmr	LB Test App 1
View	Assign Award Number/Recipient	N/A	01/04/2011	Application	Test App for 1.05 Process Maps	In Progress	2199526	1794572	01/25/2011		Institute for Community	LB Test App 1

Application Submission Type and Date Information

Type of Submission: Application Pre-Application Changed/Corrected Application

Type of Application: New Continuation Revision Renewal Resubmission

If Revision, select appropriate letter(s):

Use format MM/DD/YYYY for date fields.

Project Start Date: Project End Date: Submitted Date:

State Received Date: Federal Agency Received Date: Time:

Applicant Identifier: State Application Identifier: Federal Identifier:

Applicant Information

Legal Name: **Org Lookup**

Please Associate an Organization within Grants Online using the Org Lookup button.

Department Name:

Division Name:

DUNS Number: (9 or 13 digit number)

Step 1 : Org Lookup - Find organization's record in database or add if necessary

Select Organization

Enter your search criteria to find the organization.

Organization Name:

Address-City:

DUNS Number:

EIN Number:

Address-State:

Search **Cancel**

[Add a new organization >>](#)

2 items found, displaying all items.1

Select	Org ID	Name	Bureau	Address	DUNS	DUNS+ EIN	Case Code	ASAP	Active
Select	2002469	Institute for Community Managed Resources (ICMR)	NOAA	123 Main Street, Washington, DC 20000 USA	123456789	987654321	12345	true	true
Select	2002490	Institute for Community Managed Resources (ICMR)	NTIA	123 Main Street, Washington, DC 20001 USA	123456789	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.
- 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

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

Description

Organization Type *

Bureau *

Applicant Type

Organization Name *

Identification

Duns Number (9 digit number) (4 digit number)

EIN Number (xx-xxxxxxx)

MSI Code [Search MSI List](#)

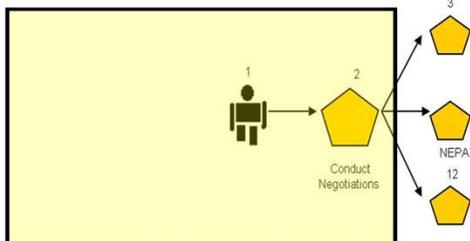
CAGE CODE:

CCR EXPIRATION DATE:

Please press 'Save' before you add attachments



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

Program is subject to E.O. 12372 but has not been selected by the state for review.
 Program is not covered by E.O. 12372.

Authorized Representative

Prefix: First Name: Middle Name: Last Name: Suffix:
 None None None None

Title:
 Phone Number: Fax Number:
 Email:

Please Associate an Authorized Representative within Grants Online for the Organization mentioned above using the Authorized Representative Lookup button.

[Authorized Representative Lookup](#)

Application Funding Details:

Total Funding: *

Multi Year Award: No

Fiscal Year	Start Date	End Date	Federal	Applicant	State	Local	Other	Total Funding	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 update

[Add Item](#)

Award Number:

[Generate New Award Number](#)

Note: The option to associate this application with an existing award is not available because a recipient organization is not yet associated with the application.

[Save](#) [Save and Return to Main](#) [Cancel](#)

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

Step 3: Generate or associate award number.



- **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.**



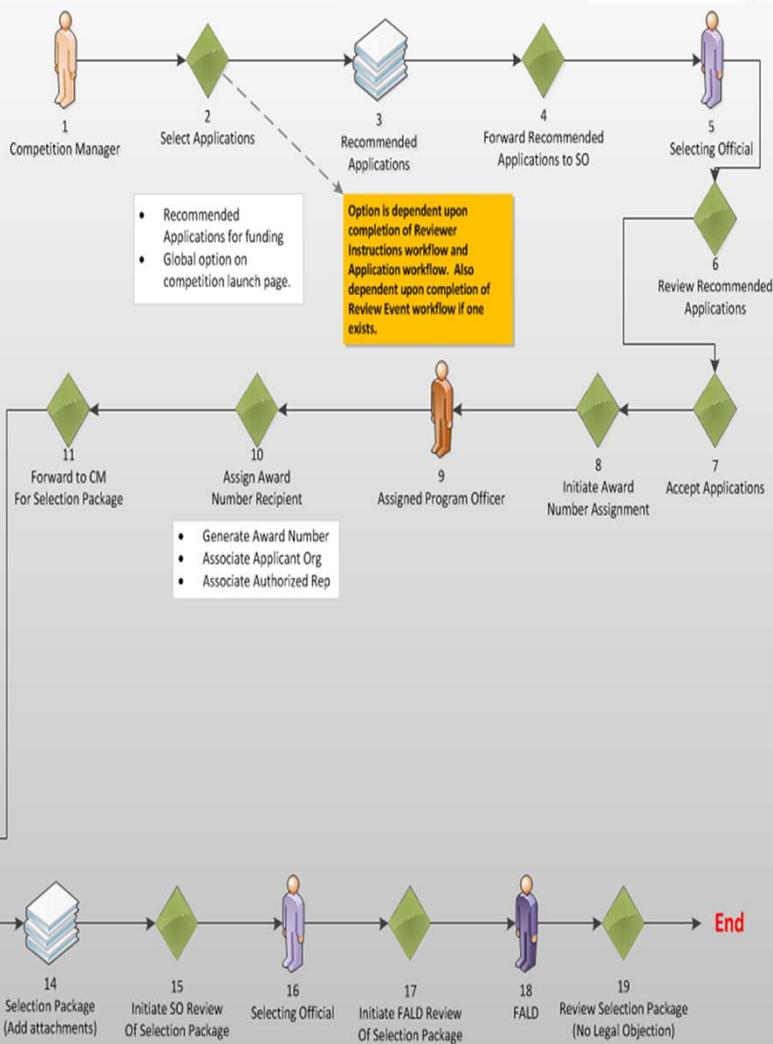
Competitive Process (COMP-3)

January 22, 2013

Select Applications for Funding Overview

Version 4.10

NOTE: "Select Applications" option remains available on the Competition Launch page. This is a global option which is available even when the user does not have a "Select Applications" task. Each time this option is chosen and additional applications are selected, the entire selection process must be repeated.





- **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.



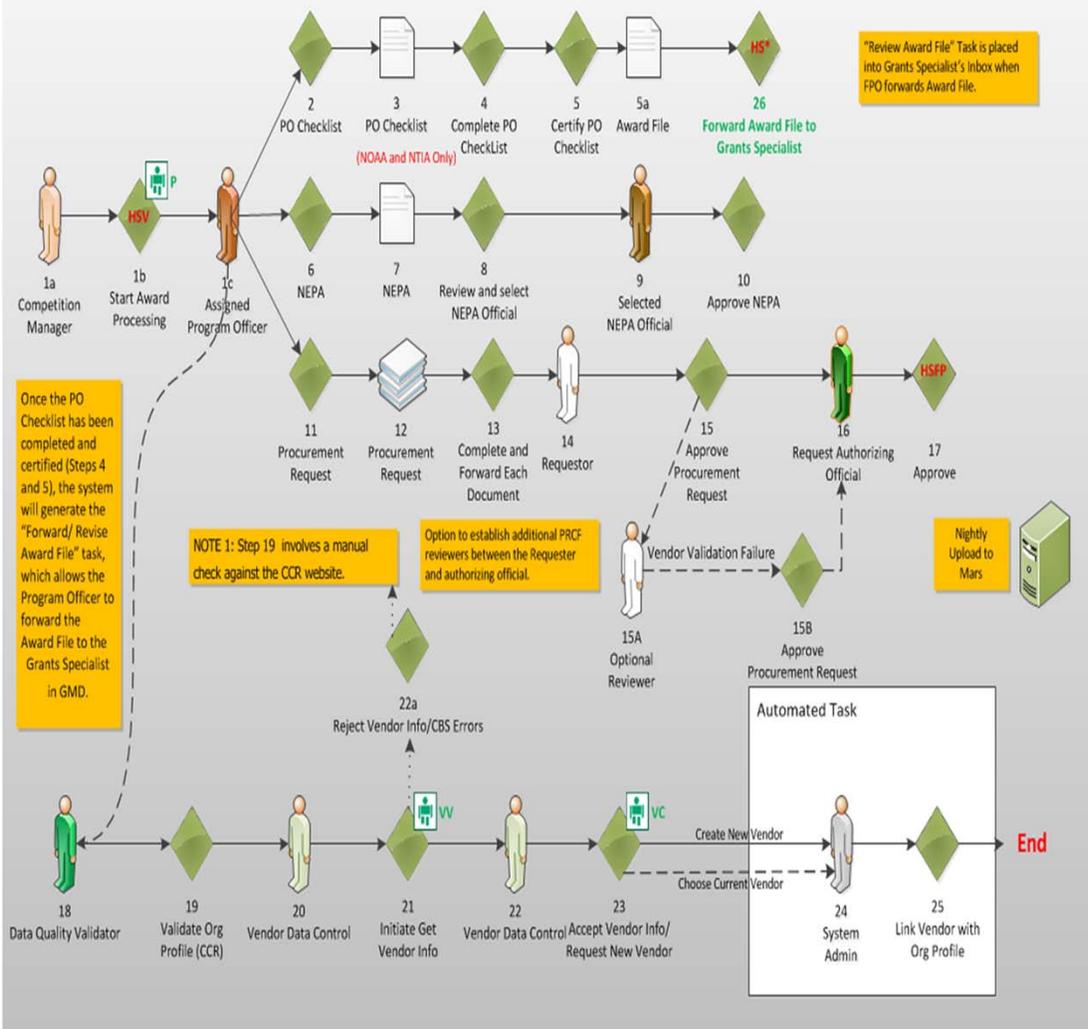
Start Award Processing Overview (COMP-4)

January 22, 2013

Version 4.10

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

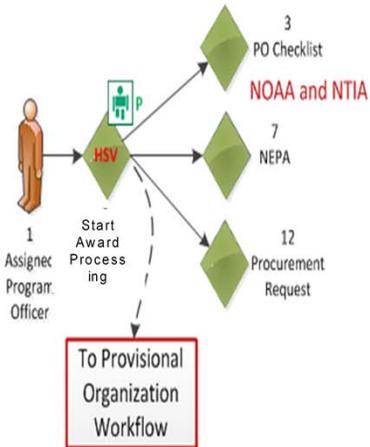
If needed, you can renegotiate the make any changes before forwarding the Award File to GMD (See separate "Renegotiation" Process Map).





- **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.**



Award File In Progress - NA12GOT9990022

Id: 2245442
Status:

Action:

Your Comments:

Attachments:

Pending Actions X

5 items found, displaying all items. 1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action	Status
PO Checklist	2245444	05/22/2012	\$5,000.00	2012	Complete PO Checklist:	Not Started
NEPA	2245446	05/22/2012	\$5,000.00	2012	NEPA Document:	Not Started
Procurement Request and Commitment of Funds	2245442	05/22/2012	\$5,000.00	2012	Procurement Request and Commitment of Funds:	Not Started
Organization Profile	2245445	05/22/2012	\$5,000.00	2012	Validate Organization Profile:	Not Started
Organization Profile	2245445	05/22/2012	\$5,000.00	2012	Validate Organization Profile:	Not Started

Your Tasks

Document Type: Status:

32 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	Propose Number
View	Procurement Request and Commitment of Funds	NA11GOT9990039	02/02/2011	Procurement Request and Commitment of Funds	Test/Training App 1 for Not Release 4.06 Comp RFA Started	In Progress	2199722	1795342			Institute for Community Managed Resources (ICMR)	LB Test App 1
View	NEPA Document	NA11GOT9990039	02/02/2011	NEPA	Test/Training App 1 for In Release 4.06 Comp RFA Progress	In Progress	2199724	1795341	02/02/2011		Institute for Community Managed Resources (ICMR)	LB Test App 1
View	Complete PO Checklist	NA11GOT9990039	02/02/2011	PO Checklist	Test/Training App 1 for Not Release 4.06 Comp RFA Started	In Progress	2199723	1795340			Institute for Community Managed Resources (ICMR)	LB Test App 1
View	Assign Award Number/Recipient	NA	02/04/2011	Application	Test App for 4.06 Process Maps	In Progress	2199526	1794572	02/25/2011		Institute for Community	LB Test App 1

(NEPA - NOAA, NTIA Only)



- 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.*

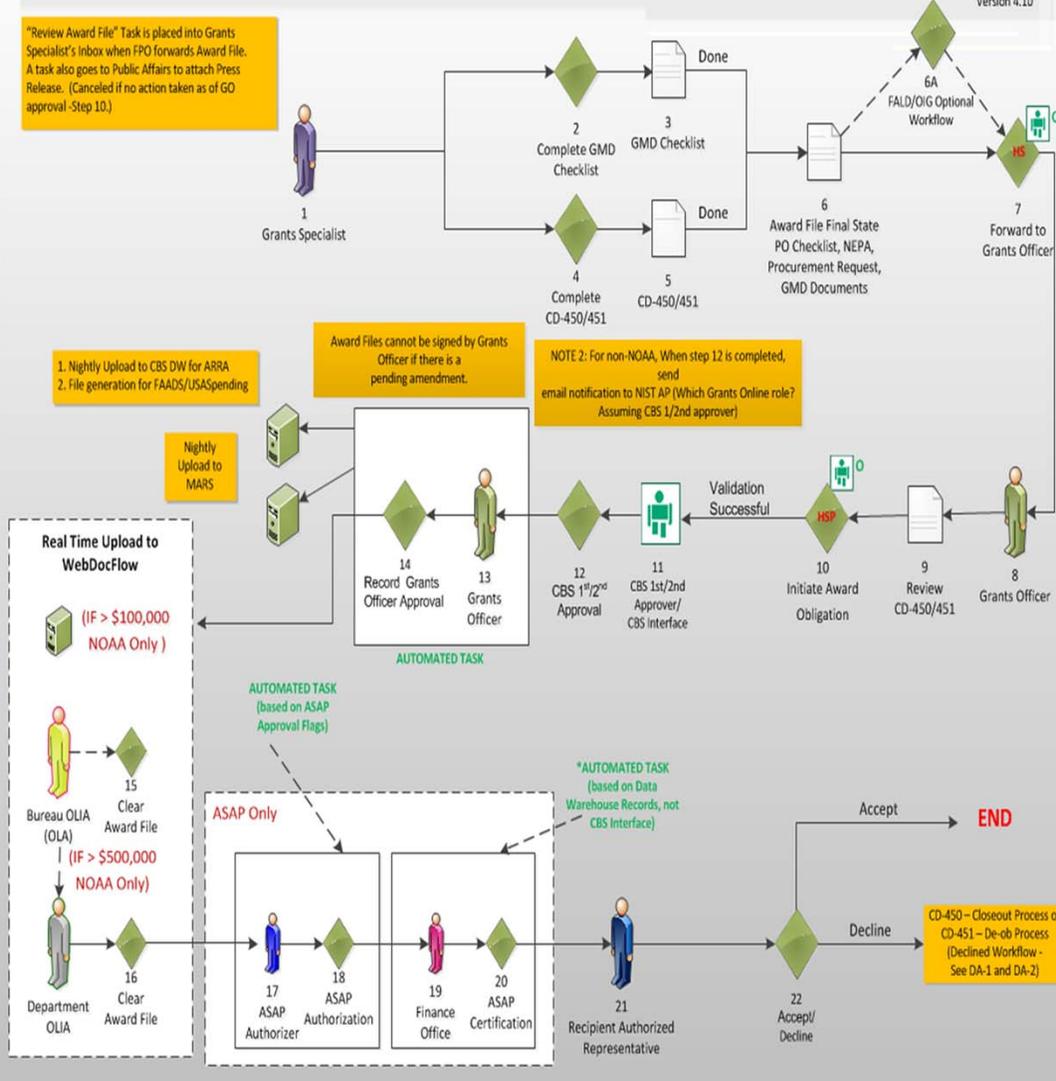
Grants Management Division Process

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

January 22, 2013

Version 4.10

"Review Award File" Task is placed into Grants Specialist's inbox when FPO forwards Award File. A task also goes to Public Affairs to attach Press Release. (Canceled if no action taken as of GO approval - Step 10.)





- 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**

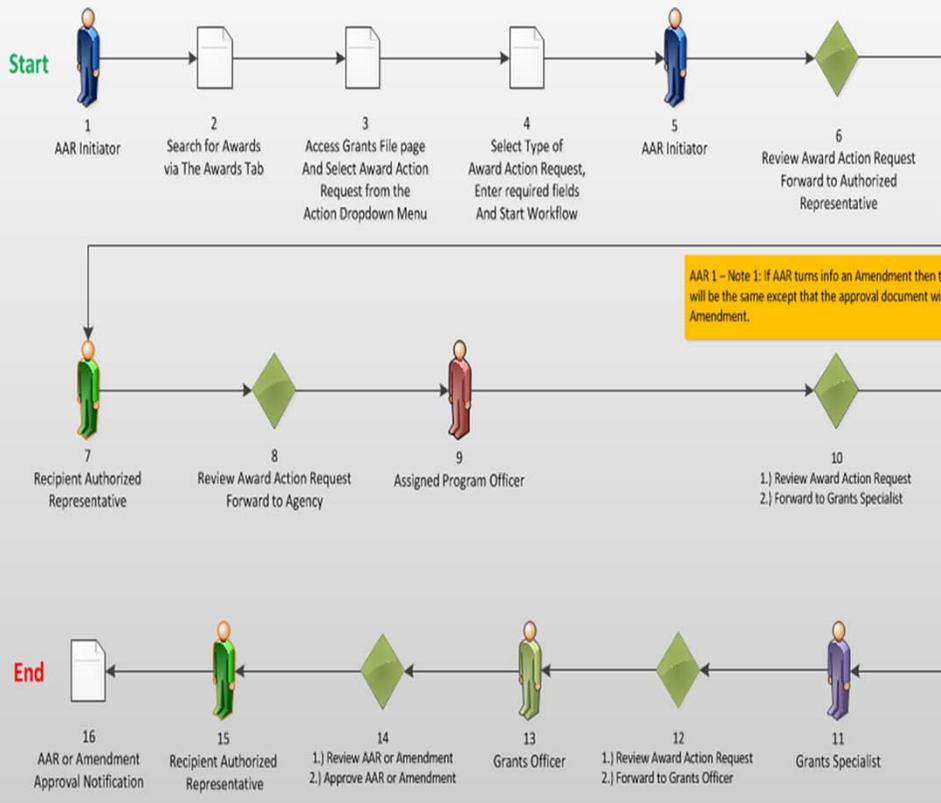
February 2013



Award Action Request Workflow (AAR-1)

January 30, 2013

Version 4.10



AAR 1 – Note 1: If AAR turns into an Amendment then the workflow will be the same except that the approval document will be an Amendment.

AAR 1 – Note 2: An amendment would have to be accepted by the Recipient Authorized Representative before becoming effective.



Award Action Request Index Page

<u>* No Cost Extension - Prior Approval Required</u>	No Cost Extension - Prior Approval Waived (Research Terms and Conditions)
<u>Extension to Close Out</u>	<u>Reprogram or Rebudget</u>
<u>* Change in Scope</u>	<u>Equipment Purchase</u>
<u>* Transfer of Award</u>	<u>Foreign Travel</u>
<u>Change in Principal Investigator/Project Director</u>	<u>Sole Source Contract</u>
<u>Change in Key Person Specified in the Application</u>	<u>Absence of more than 3 months or 25% by project director or PI</u>
<u>Satisfied Special Award Conditions</u>	<u>Inclusion of cost that require prior approval based on cost principles</u>
<u>Transfer of funds allotted for training to other categories of expenses</u>	<u>* Sub award, transfer or contracting out of any work under the award if not described in the approved application</u>
<u>Pre-Award Cost</u>	<u>* Termination for Convenience</u>
<u>Other</u>	

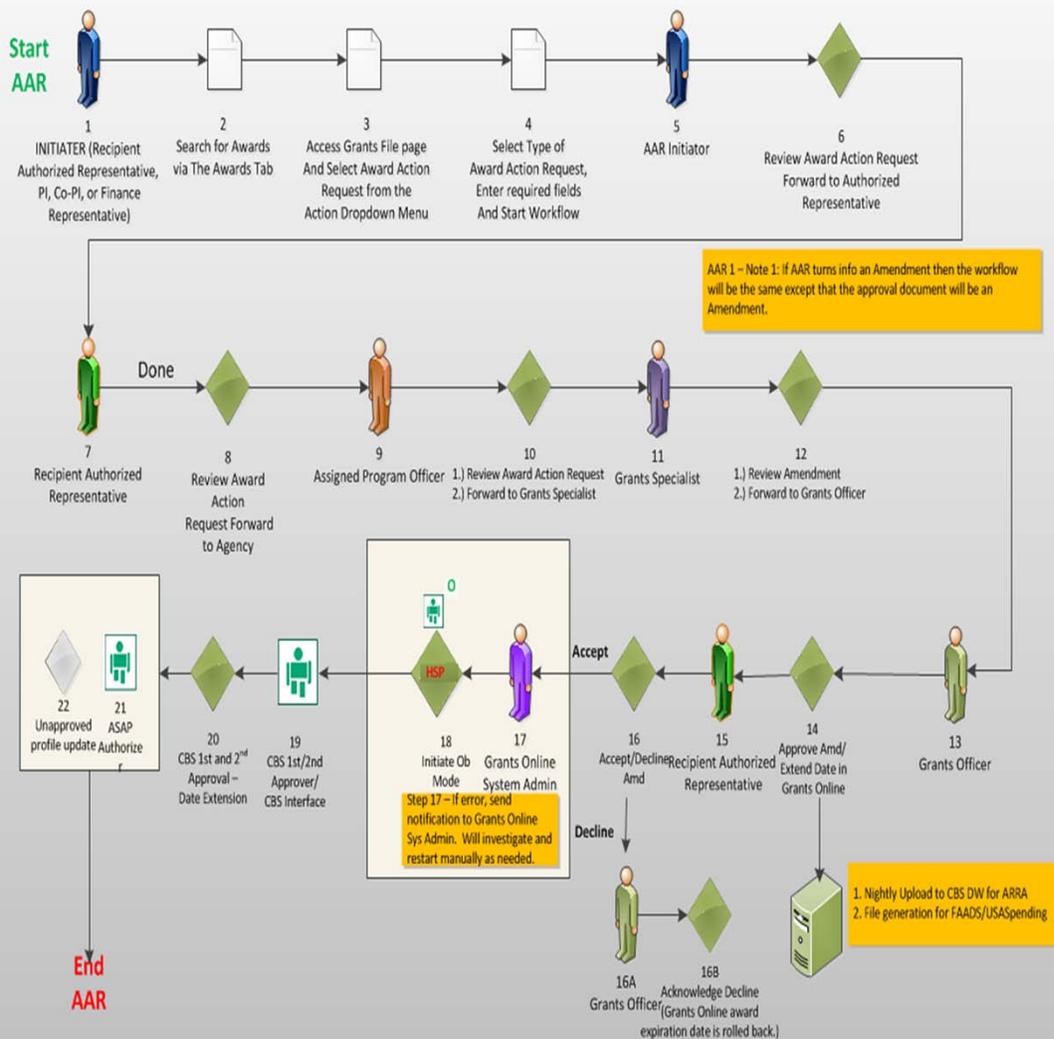


Award Action Request Workflow (AAR-2)

(No Cost Extension – Prior Approval Required)

January 30, 2013

Version 4.10



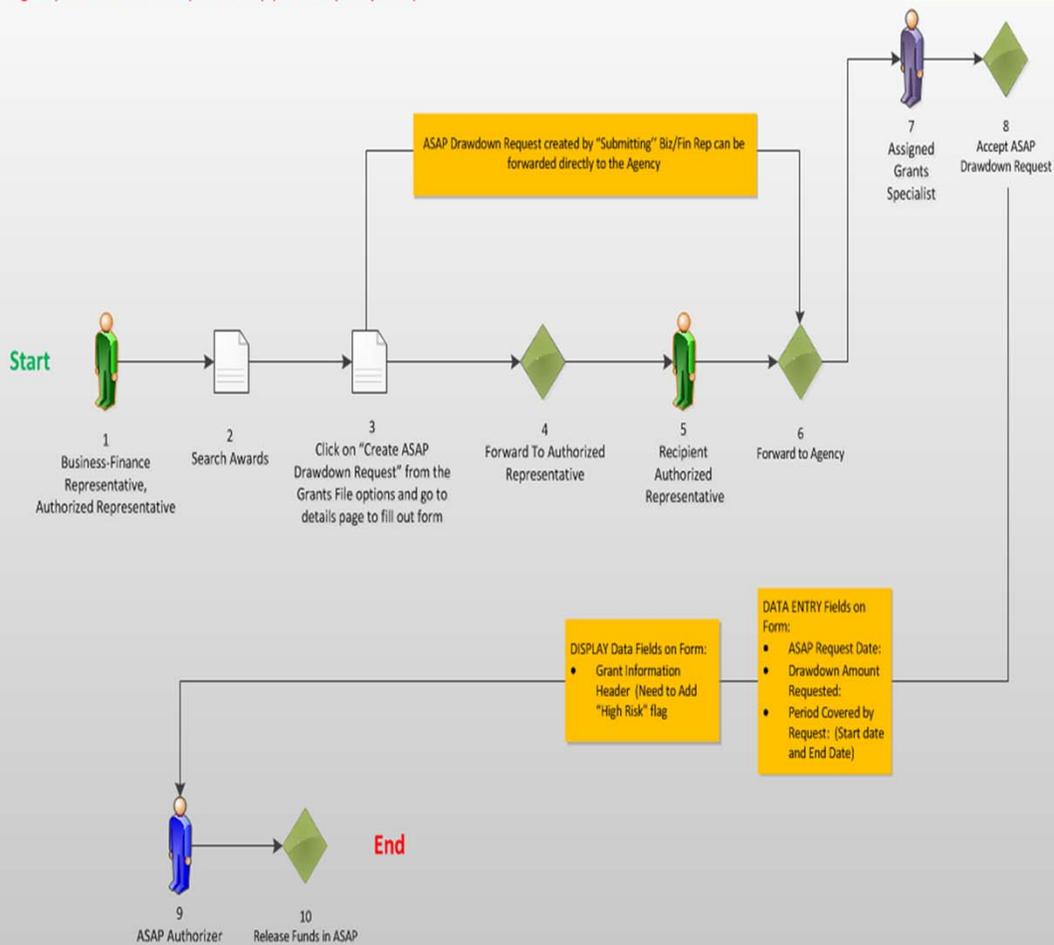


ASAP Drawdown Request (AAR-5)

January 30, 2013

Version 4.10

Agency Review ASAP Recipients Only (Currently Only NIST)





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

February 2013

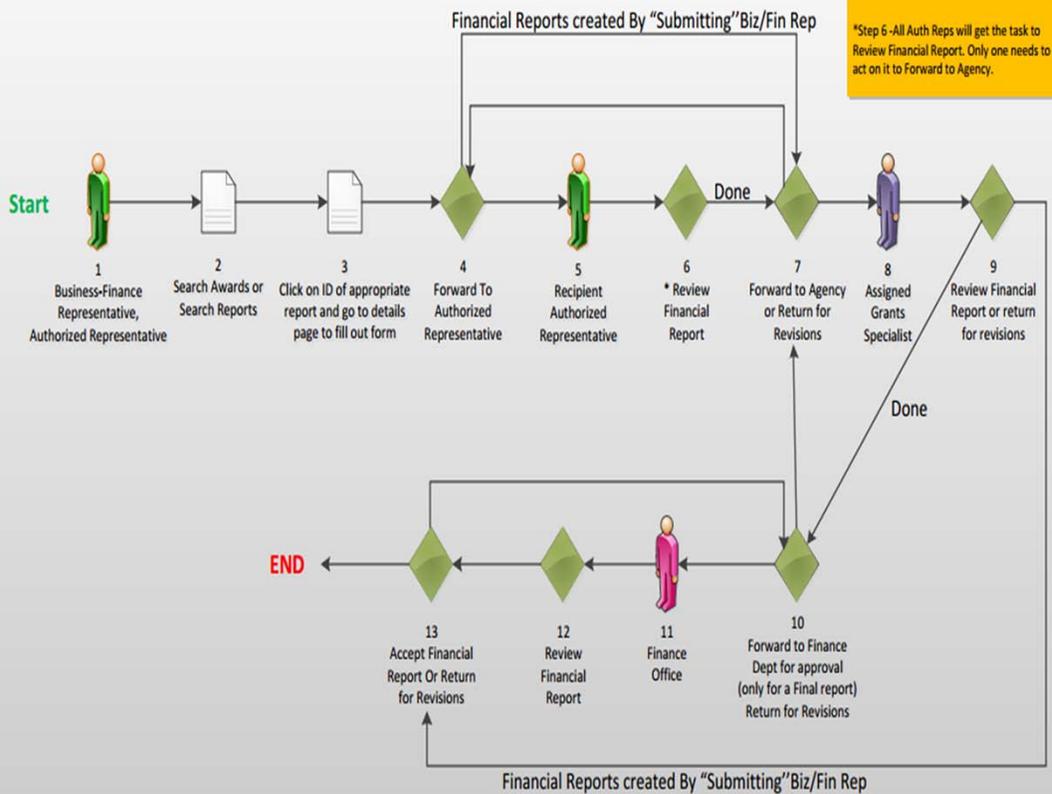


Routing of Federal Financial Reports (FR-1)

(SF-450)

June 17, 2012

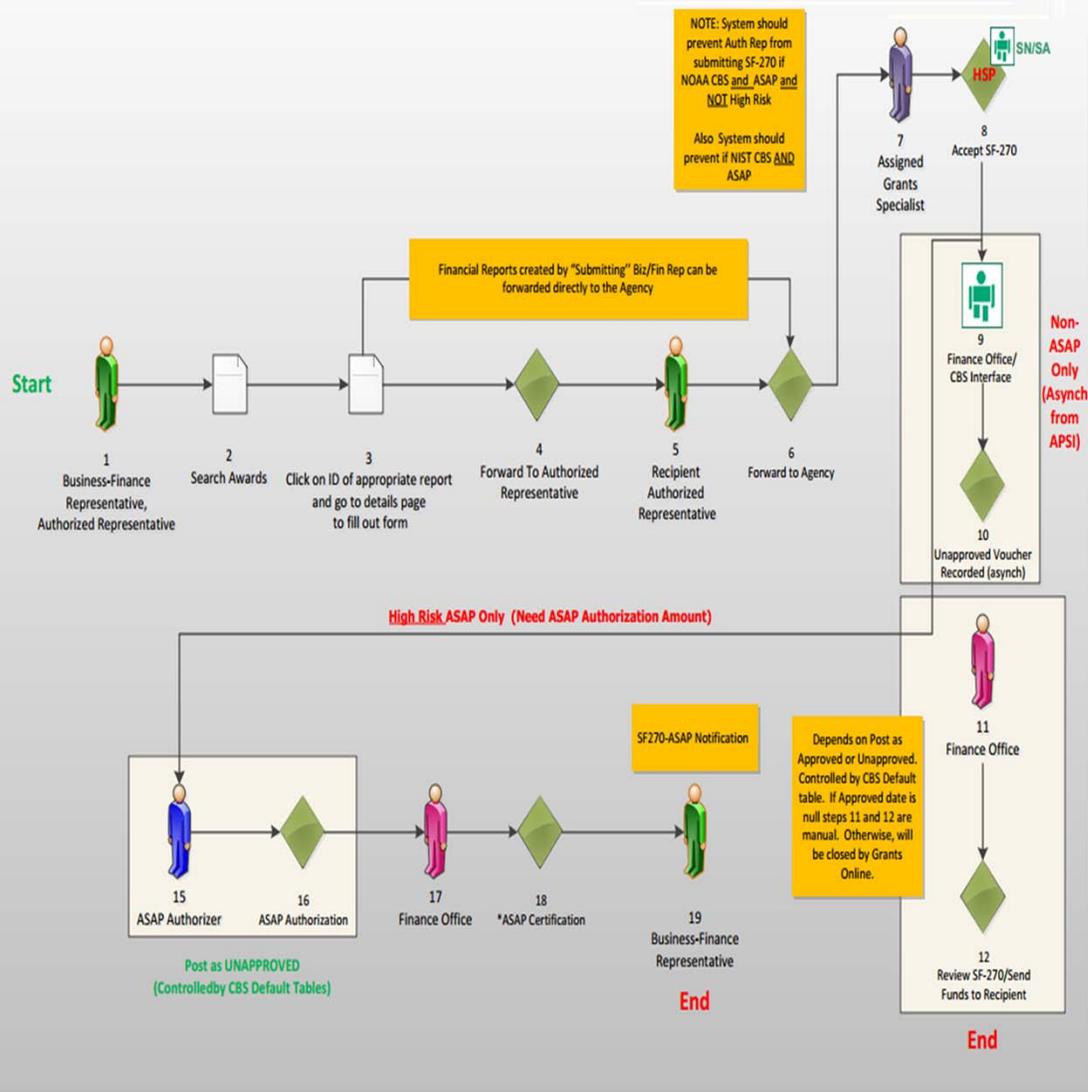
Version 4.09





Routing of Federal Financial Reports (FR-2) (SF-270)

June 17, 2012
Version 4.09





Grants Online Training Post Award Processes

February 2013



FPO – Partial Funding Steps 1 and 2

Search Awards

Award Number:

Recipient Name:

Project Title:

Award Status:

PI-PD Last Name:

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	Principal Investigators-Project Directors
NA09GOT4990038	2001932	Institute for Culturally Managed Resources (ICMR)	TEST RECORD - Grants Online Training Application05	Accepted	None Designated
NA09GOT4990027	2001932	Institute for Culturally Managed Resources (ICMR)	TEST RECORD - Grants Online Training Application07	Accepted	None Designated
NA09GOT4990008	2001932	Institute for Culturally Managed Resources (ICMR)	TEST RECORD - Grants Online Training Application	Accepted	None Designated
NA09GOT4990034	2001932	Institute for	TEST RECORD - Grants	Accepted	None Designated

Grants File - NA09GOT4990038

Id: 2139154
Status: Accepted

Action:

Your Comments:
 View Accounting Details
 View/Manage Award-related Personnel

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”.



FPO – Partial Funding Steps 3 and 4

Partial Funding -- NA09GOT4990038

Memo * [Guidance](#)

Approved Plan and Prior Obligations

Action	Application ID	Project Title
<input type="button" value="Select"/>	2139113	TEST RECORD - Grants Online Training Application05

Selected Application

None

Approved Plan and Prior Obligations

Action	Application ID	Project Title
<input type="button" value="Select"/>	2139113	TEST RECORD - Grants Online Training Application05

Planned Year	Approved Fed Share	Obligated	Approved Non-Fed Share	Assigned Non-Fed Share
2009	\$125,000.00	\$125,000.00	\$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.



FPO – Partial Funding Step 5

Organization Name:	Institute for Culturally Managed Resources (ICMR)	Electronic Recipient: Yes	ASAP Recipient:
SF-425 Frequency: (after 3/31/2009)	Semi-Annual Cash Flow with Report	Frequency: 4/1/2009	
Progress Report Frequency:	Semi-Annually	n report is	
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.

The screenshot shows a browser window with the title 'Partial Funding Guidance - Windows Internet Ex...'. The address bar shows 'https://gran...'. The page content includes the heading 'Grants Online Partial Funding Guidance' and a sub-heading 'Partial Funding Memo'. The memo text explains that the Partial Funding Memo is used to explain the state of funding for the approved Application. It notes that 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. Other 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	\$0,000.00	\$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.



FPO – Partial Funding Step 9

Award File In Progress - NA09GOT4990038

Id: 2147952
Status: Program Officer Actions - 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 FAIS Sheet
View Reporting Frequencies
View/Edit Partial Funding Document
Save Comment

Print Award File History

Attachments:

Pending Actions X

One item found.1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status	Last Action Date	Last Action User
Procurement Request and Commitment of Funds	214795304/24/2009			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.)

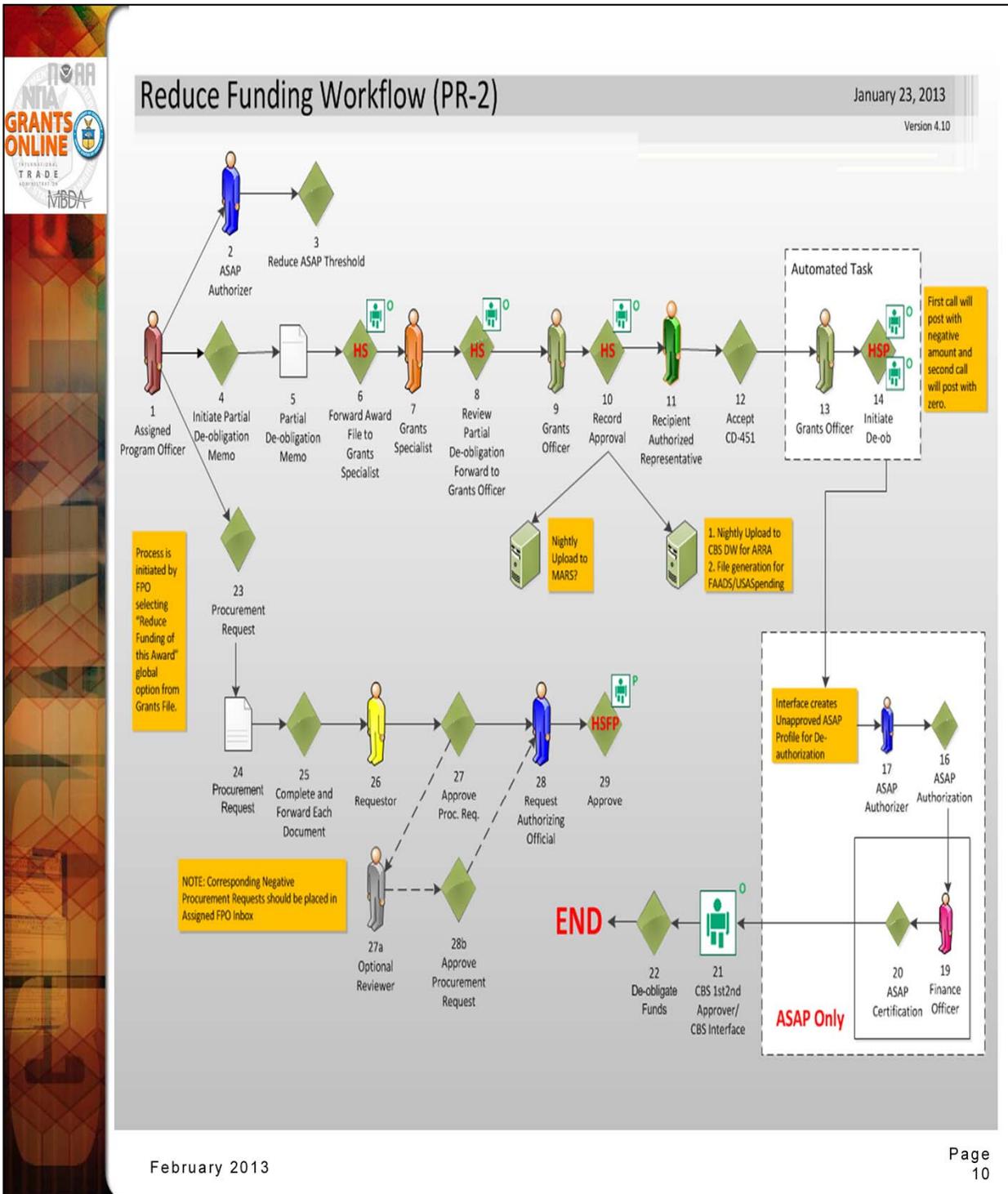
9. In most cases, after the Procurement Request has been approved, you can simply select "Forward to Grants Specialist for Review" and add a workflow comment. Do not make any edits to the "Amendment Details"; they will be done by the Grants Specialist. If changes to the Partial Funding Memo or Funding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



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.*



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



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

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

Grants File - NA12GOT9990023

Id: 2245484
Status: Accepted

Action: Please select an action Submit

Your Comments: Please select an action

Partially Fund this Award
Reduce Funding of this Award
View Accounting Details
View/Manage Award-related Personnel

Spell Check

Save Comment

Reduce Funding -- NA12GOT9990023

Memo * [Guidance](#)

Reduction in Funding

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

143 / 4000 Spell Check

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

February 2013

Page 11

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.



01 items found, displaying all items.

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 - ACCS Lines *

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWValidated	Action
14	2000	2012	10-01-0002-00-00-00-00	52-30-00-000	SAE0000-SAE	41-12-00-00	(\$100.00)	N	Yes	Edit Delete

[Add New ACCS Line](#)

PRCF Total for this Award action: \$-100.00

Total Federal funds authorized for this Award action: \$-100.00

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.



NOAA
GRANTS ONLINE
INTERNATIONAL
TRADE
ADMINISTRATION
MBDA

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 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:

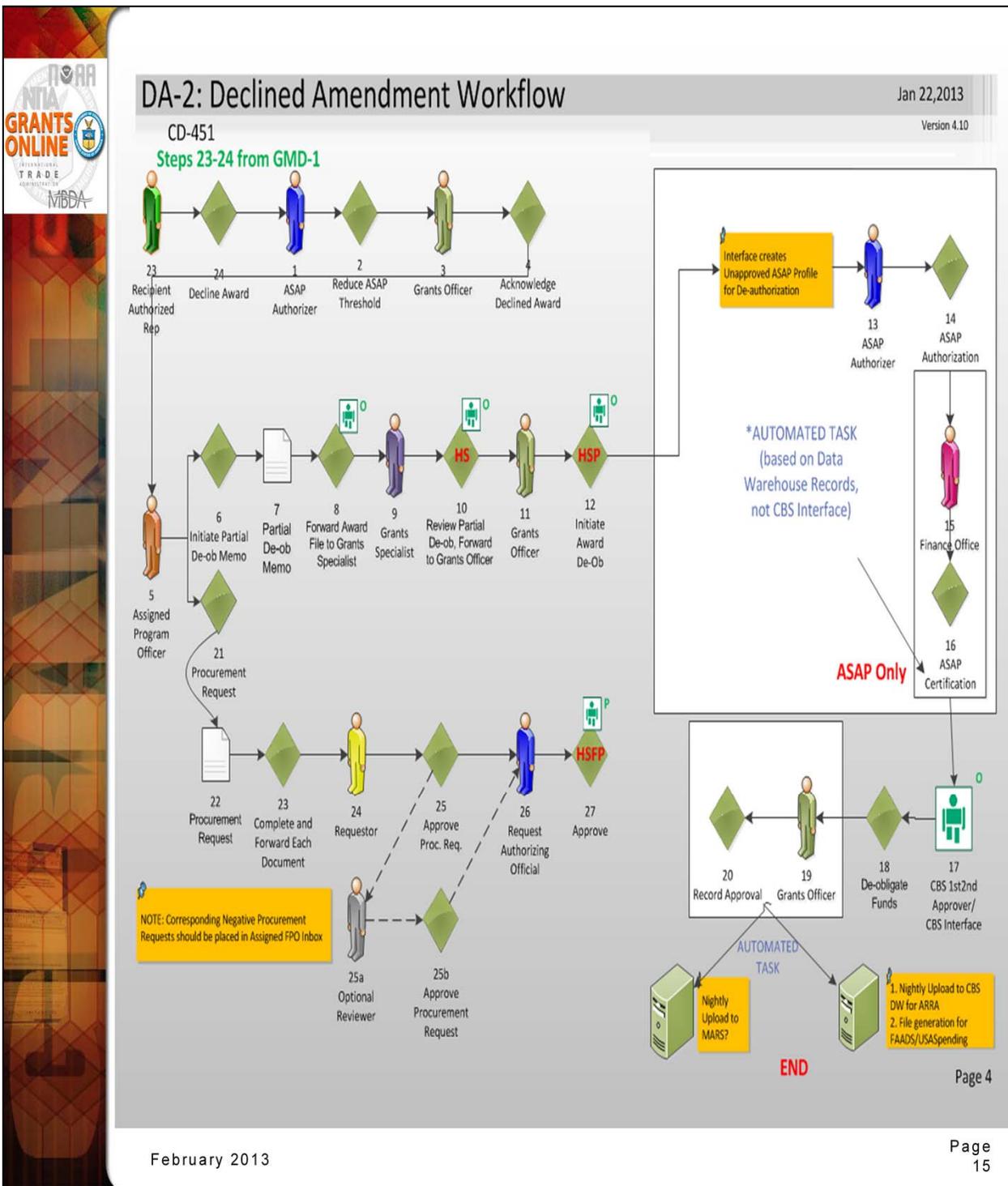
The Grants Management Division has reviewed the subject award. This document serves as authorization to proceed with the de-obligation process.

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

February 2013

Page
13

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.

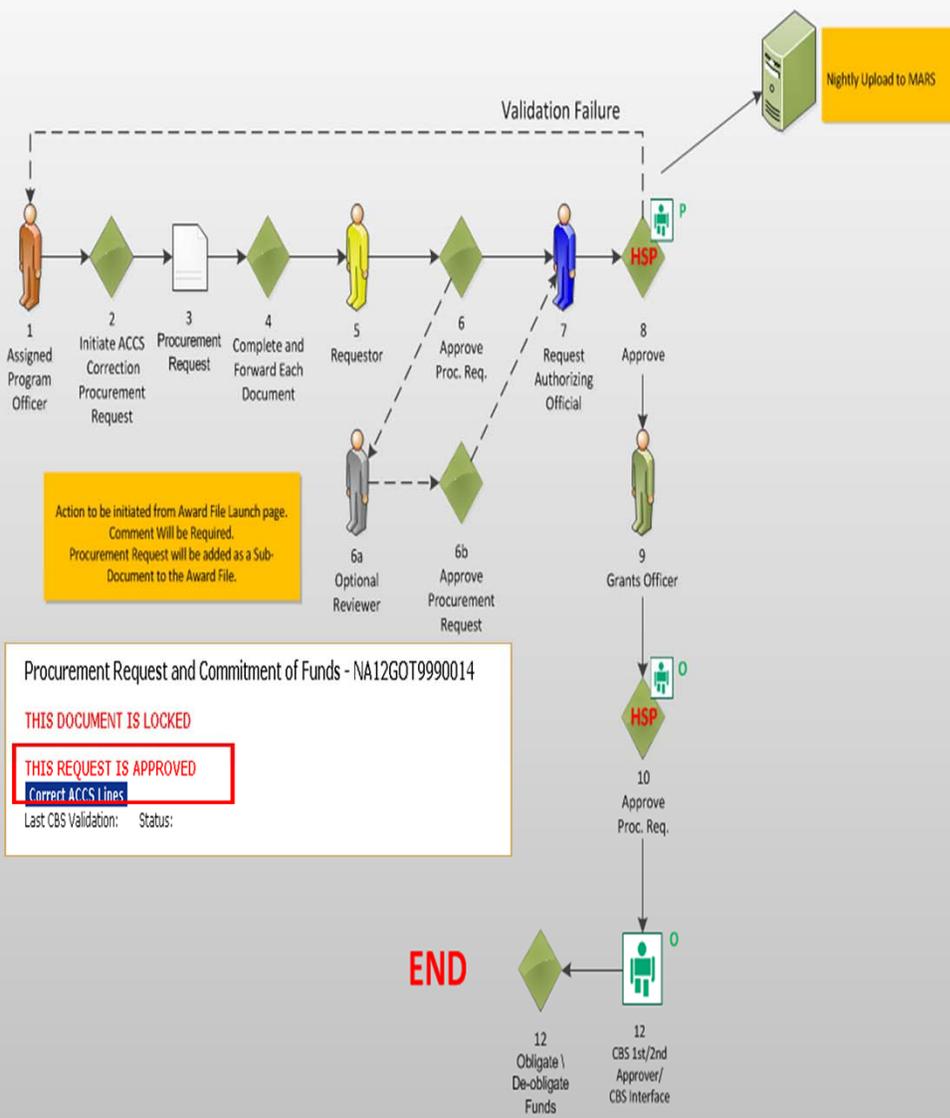


Correct ACCS Lines on Approved Award (PR-3)

(No Net Dollar Change)

January 23, 2013

Version 4.10



Action to be initiated from Award File Launch page. Comment Will be Required. Procurement Request will be added as a Sub-Document to the Award File.

Procurement Request and Commitment of Funds - NA12GOT9990014

THIS DOCUMENT IS LOCKED

THIS REQUEST IS APPROVED

Correct ACCS Lines

Last CBS Validation: Status:

END

Accounting - ACCS Lines *

2 items found, displaying all items.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DW	Validated
14	1	2012	06 -02 -0004-01-00-00-00	01-01-02-000	14K3BN8-P00	41-11-00-00	\$10,000.00	N		Yes
14	2000	2012	10 -01 -0002-00-00-00-00	52-30-00-000	SAE0000-SAE	41-12-00-00	(\$10,000.00)	N		Yes

[Add New ACCS Line](#)

PRCF Total for this Award action: \$10,000.00
 Total Federal funds authorized for this Award action: \$10,000.00



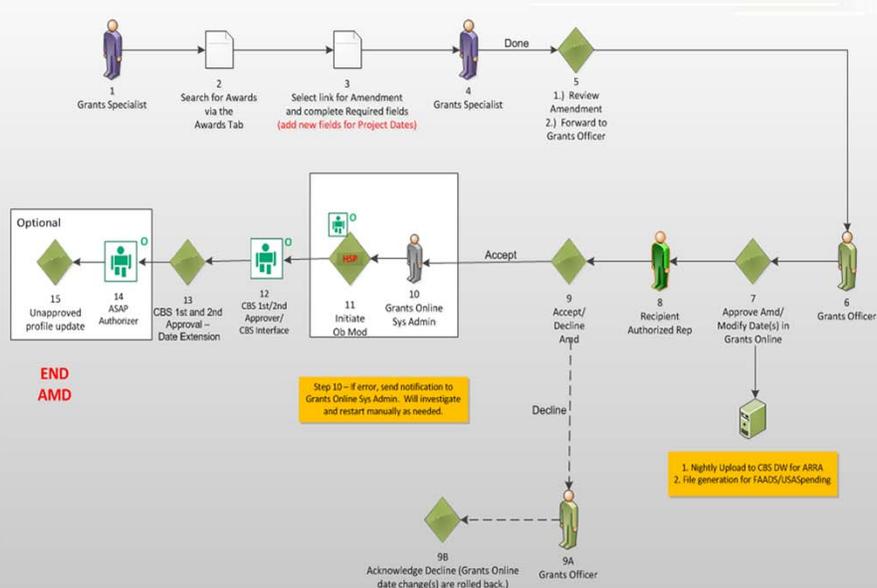
- To make a correction to the ACCS line on an already approved award:
 1. Navigate to the Award File containing the Procurement Request which needs to be corrected.
 2. Access the details page of the Procurement Request that needs to be corrected.
 3. Click on the “Correct ACCS” button. This will generate 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.



Administrative Amendment – Date Changes (GMD-2) January 22, 2013

Non-Funded Amendment Version 4.10



Amendment to Financial Assistance Award

<p>CFDA Number: 11.999</p> <p>Award Number: NA12GOT9990014</p> <p>Recipient Name: Institute for Community Managed Resources (ICMR)</p> <p>Amendment Start and End Dates: * [] - []</p> <p><i>The Amendment Start and End Date fields and the Project Start and End Date fields are not part of the official CD-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.</i></p> <p>Project Start and End Dates: [] - []</p>	<p>Grant Type: <input checked="" type="radio"/> Grant <input type="radio"/> Cooperative Agreement <i>(Condition)</i></p> <p>Amendment Number: Pending</p> <p>Street Address: 123 Main Street Washington, DC 20000</p> <p>Extend Work Completion To: N/A</p>
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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.

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

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

