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## **Grants Online Training New Federal Program Officers**

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**May 2015**





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# Federal Program Officer Training Agenda

Day 1 - AM

<b>Session 1: Grants Online Overview and System Navigation 8:00 am – 10:15 am</b>	
<b>Topic</b>	<b>Duration</b>
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

<b>AAR</b>	Award Action Request
<b>ACCS</b>	Accounting Classification Code Structure
<b>AGO</b>	Acquisition & Grants Management Office, NOAA
<b>AO</b>	Authorizing Official on Procurement Requests (see also BO)
<b>AR or AOR</b>	(Recipient) Authorized Representative
<b>ARRA</b>	American Recovery and Reinvestment Act
<b>ASAP</b>	Automated Standard Application for Payment (Department of the Treasury)
<b>BAA</b>	Broad Agency Announcement
<b>BO</b>	Budget Official (In Grants Online this is the Procurement Request Authorizing Official)
<b>CAMS</b>	Commerce Administrative Management System (now known as CBS)
<b>CBS</b>	Commerce Business Systems (formerly CAMS)
<b>CCR</b>	Central Contract Registry (now known as System for Award Management (SAM))
<b>CD</b>	Congressional District
<b>CD-</b>	Commerce Department (when used in a form number -- e.g., CD-435, CD-450, CD-451)
<b>CFDA</b>	Catalog of Federal Domestic Assistance
<b>CFR</b>	Code of Federal Regulations
<b>CM</b>	Competition Manager
<b>Co-PI</b>	(Recipient) Principal Investigator - Secondary
<b>DOC</b>	Department of Commerce
<b>DOC-OS</b>	Office of the Secretary, DOC
<b>DUNS</b>	Dun & Bradstreet Number
<b>EIN</b>	Employer Identification Number
<b>FAADS</b>	Federal Assistance Award Data System
<b>FAIS</b>	Federal Assistance Information Sheet
<b>FALD</b>	Federal Assistance Law Division of DOC
<b>FCS</b>	U.S. and Foreign Commercial Service, ITA
<b>FFO</b>	Federal Funding Opportunity
<b>FFR</b>	Federal Financial Report
<b>FIPS</b>	Federal Information Processing Standards
<b>FON</b>	Funding Opportunity Number
<b>FPO</b>	Federal Program Officer
<b>FRN</b>	Federal Register Notice
<b>GMAC</b>	Grants Management Advisory Committee (NOAA)

## DOC Grants and Grants Online Acronyms

<b>GMD</b>	Grants Management Division (Silver Spring and HCHB), DOC/NOAA
<b>GNS</b>	Grants Notification System (used by OLIA)
<b>GO</b>	Grants Officer
<b>GS</b>	Grants Specialist
<b>IA</b>	Import Administration, ITA
<b>ITA</b>	International Trade Administration
<b>LO</b>	Line Office
<b>MARS</b>	Management Analysis and Reporting System
<b>MBDA</b>	Minority Business Development Agency
<b>NCE</b>	No Cost Extension
<b>NEPA</b>	National Environmental Policy Act
<b>NESDIS</b>	National Environmental Satellite, Data, and Information Service (NOAA Satellite Service)
<b>NFA or OFA</b>	NOAA Finance and Administration
<b>NMFS</b>	National Marine Fisheries Service (NOAA Fisheries Service)
<b>NOAA</b>	National Oceanic and Atmospheric Administration
<b>NOFA</b>	Notice of Funds Availability (See FFO, FRN, RFA)
<b>NOS</b>	National Ocean Service (NOAA's Ocean Service)
<b>NTIA</b>	National Telecommunications and Information Administration
<b>NWS</b>	National Weather Service, NOAA
<b>OAR</b>	Ocean and Atmospheric Research (NOAA Research)
<b>OCPO</b>	One Commerce Program Office
<b>ONPO</b>	One NOAA Program Office
<b>OGC</b>	Office of General Counsel, DOC
<b>OHRM</b>	Office of Human Resource Management, DOC-OS
<b>OIG</b>	Office of Inspector General, DOC
<b>OLA</b>	Office of Legislative Affairs (Bureaus)
<b>OLIA</b>	Office of Legislative and Intergovernmental Affairs, (Bureaus and DOC)
<b>OMB</b>	Office of Management and Budget (part of the Executive Office of the President)
<b>ONPO</b>	One NOAA Program Office
<b>OS</b>	Office of the Secretary, DOC
<b>OTIA</b>	Office of Telecommunications and Information Applications, NTIA
<b>PD</b>	(Recipient) Project Director
<b>PI</b>	(Recipient) Principal Investigator

## DOC Grants and Grants Online Acronyms

<b>PO</b>	Program Office (sub-organization under a Line Office)
<b>PPR</b>	Performance Progress Report
<b>PRCF</b>	Procurement Request and Commitment of Funds (CD-435) / Funding Memo
<b>RFA</b>	Request for Application
<b>SAC</b>	Special Award Conditions
<b>SAM</b>	System for Award Management
<b>SEC</b>	Office of the Under Secretary for Oceans and Atmosphere (USEC abbreviated to SEC for use in FON)
<b>SF-XXX</b>	Standard Form issued by the Office Management and Budget (e.g., SF-424, SF-269, SF-270, etc.)
<b>SO</b>	Selecting Official
<b>USEC</b>	Office of the Under Secretary for Oceans and Atmosphere (NOAA Upper Management)



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# Grants Online Overview

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**May 2015**

## Project Goals

- A Single Unified Grant Processing and Administration system that uses an electronic solution to reduce processing time.
- A reliable, robust, and scalable solution that can accommodate mission-critical, high-volume usage.
- An interface with the *Grants.gov* initiative to provide “one-stop” shopping for Federal grants-related activities.
- Standardized business processes that contribute to a more efficient 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** – FY 2006

**Rollout to DOC** – March 2009

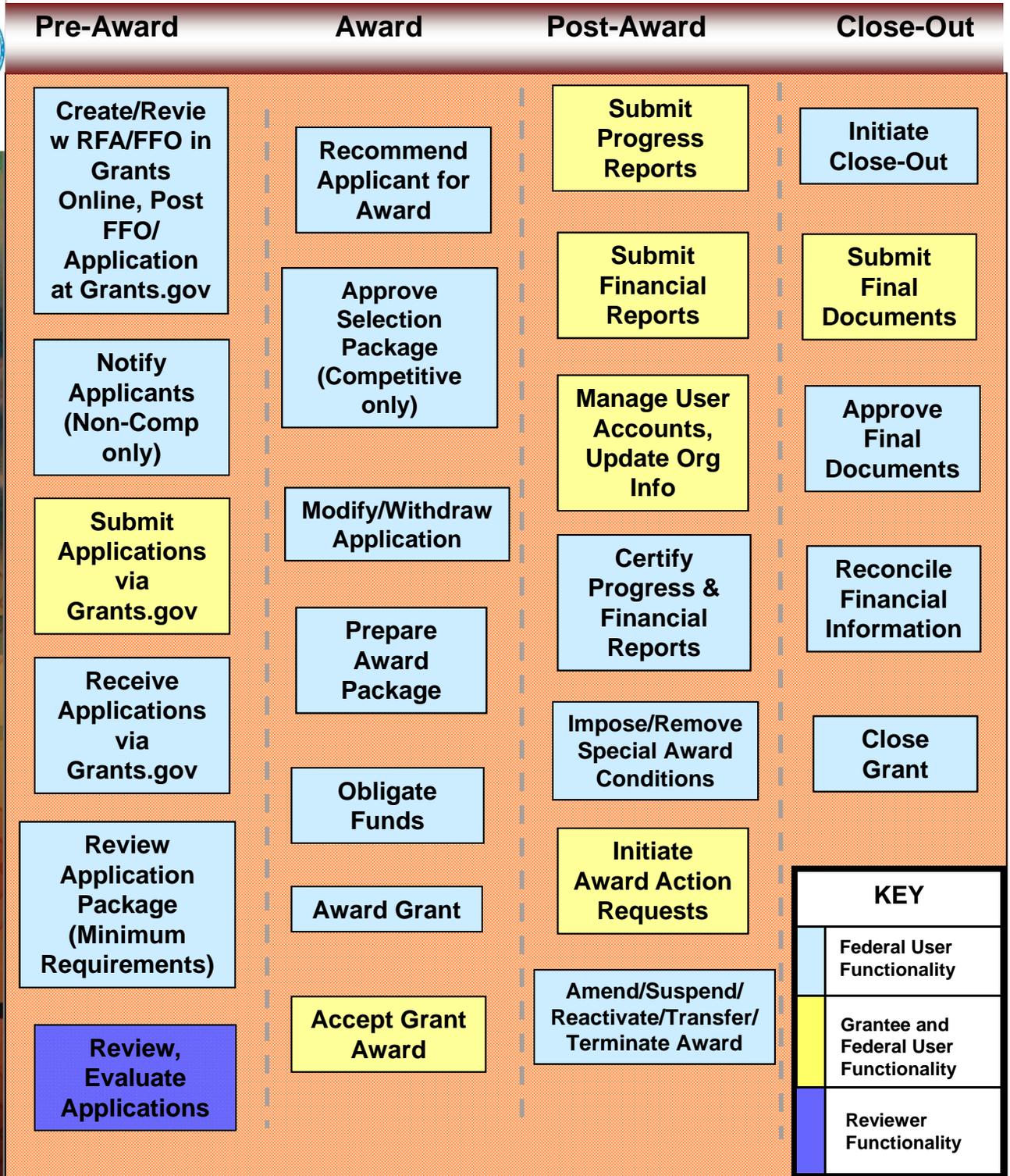
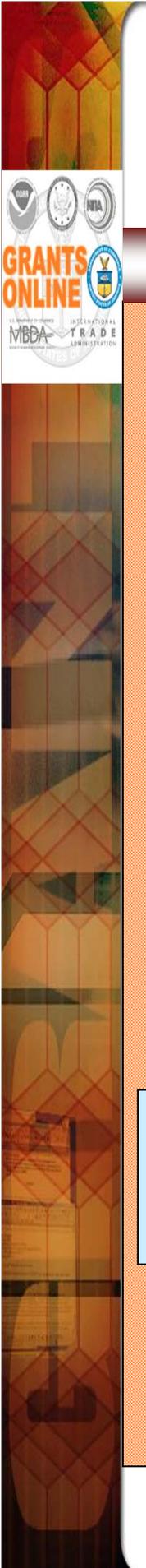
**Review Module** – October 2011

**CBS Interface** – June 2012

**Rollout to EDA** – FY 2015

**Rollout to NIST** – FY 2017 (In Planning)

# Grants Life Cycle





# Grants Online System Requirements

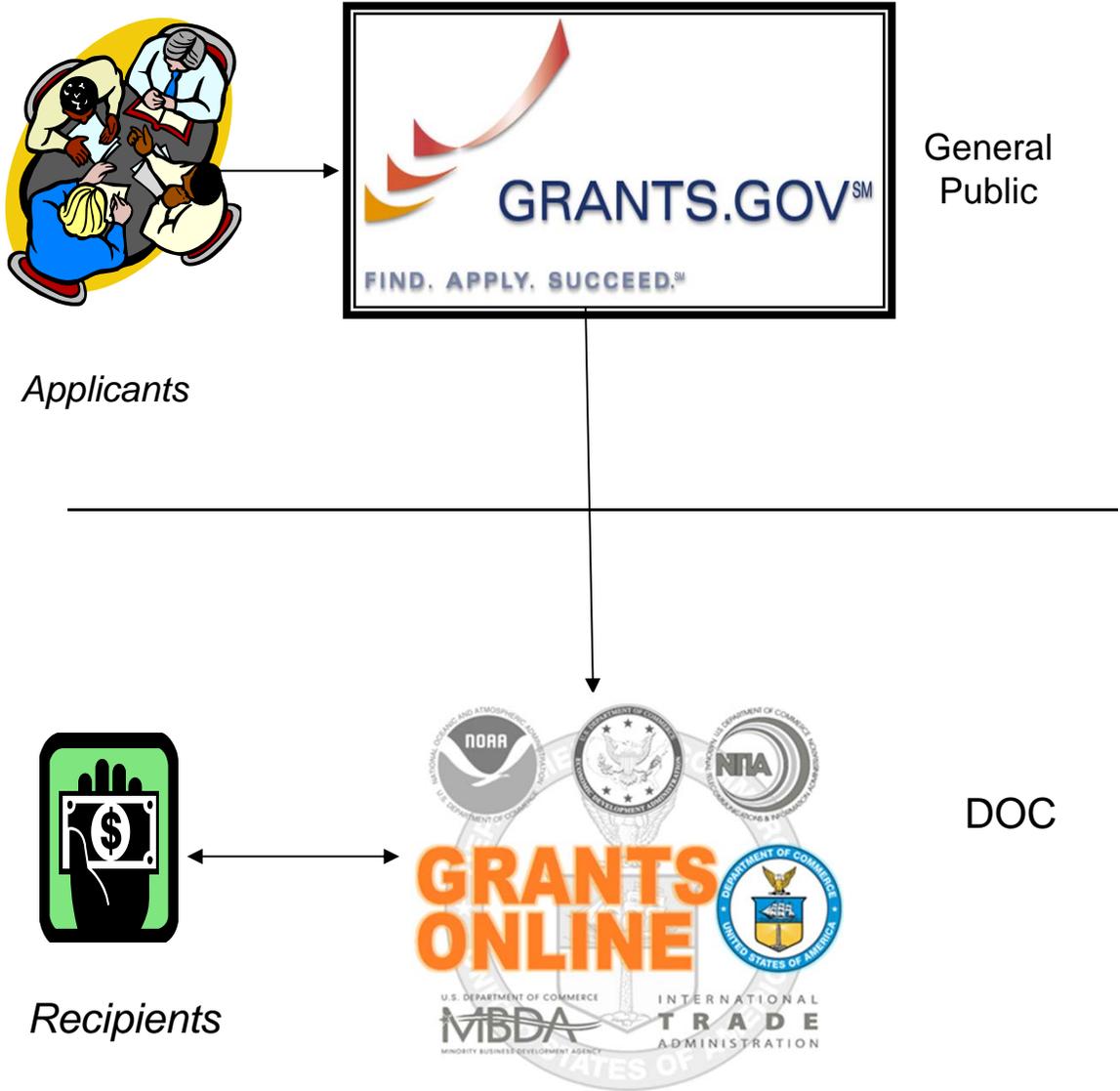
## The System

Grants Online operates in a web environment and is accessible anywhere and anytime the user has Internet access. There is not a need for the user to install any special software on his/her computer. However, each user must register and obtain a unique login id and password from the appropriate official at his/her agency.

## Recommended Internet Browsers:

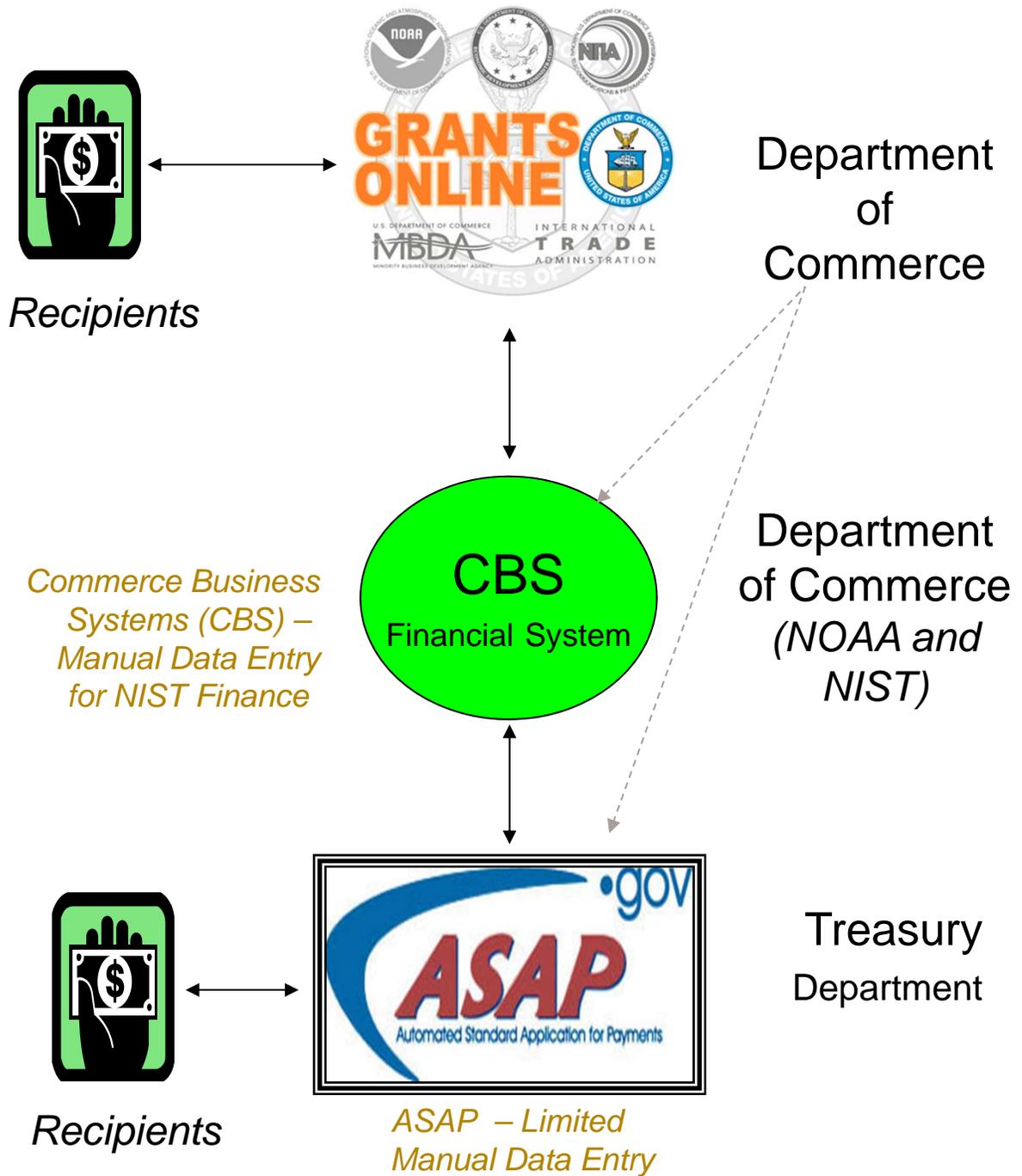
- Windows – Internet Explorer 8 or higher
  - Attachments are not supported in IE 9
- Mac – Safari 3.1 or higher
- Windows or Mac – Firefox 2.0 or higher
- Google Chrome

# Grants Online and Grants.gov





# Grants Online and ASAP

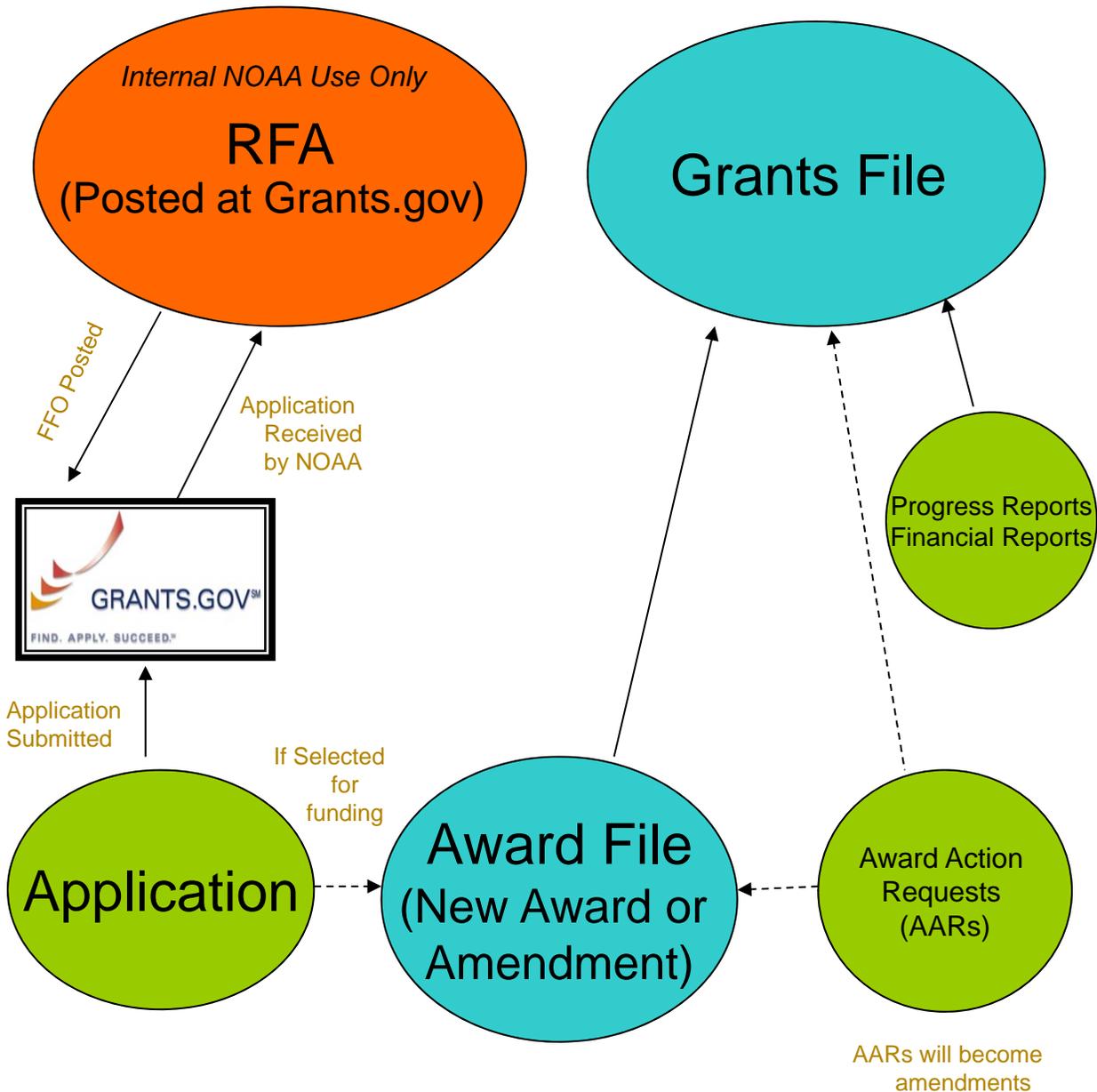


# Grants Online Document Relationships



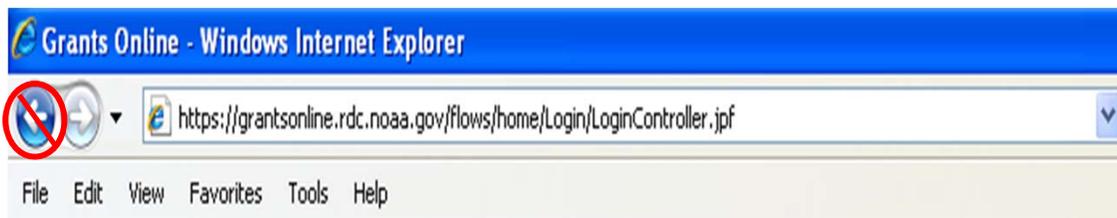
*Pre-Award Processing*

*Post-Award Processing*



# Grants Online Helpful Hints

- **DO NOT** use the browser's "Back" button.



- On the Home Page, click the "Forgot your username?" link to locate the Help Desk phone number.

The page at <https://grantsonlinetraining.rdc.noaa.gov> says: x

To recover your username, please contact the Grants Online Help Desk at 1-877-662-2478 or 301-444-2112

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**REVIEWERS**

- Access current applications assigned to you
- Submit your review comments and scores
- If you have been assigned a review in Grants Online, you must login through the [Grants Online Application Review](#) page.

**Federal Staff**

- Generate funding notices
- Review grant applications
- Select applications for award
- Process selected applications
- Award and manage grants
- Correspond with Grant Recipients

**Grants Online is the premier Federal solution for full life-cycle grants management processing.**

**Username**

**Password**

[Forgot your username?](#)

[Forgot your password?](#)



# Grants Online Helpful Hints (continued)

- After clicking “Save and Start Workflow” always go to the Inbox – Tasks for the next action. If you do not see the new task, click “Tasks” in the left navigation pane to refresh the page. ***To prevent unaddressed Tasks from remaining in the Inbox, always click the Tasks link prior to logging out.***



Advisories >> Tasks

**Your Tasks**

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

11 items found, displaying all items. 1

View	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date	Completed Date	Award Number
<a href="#">View</a>	2564265	Notify Recipients	In Progress	RFA	2256808	05/20/2014		N/A
<a href="#">View</a>	2556044	Notify Recipients	In Progress	RFA	2256757	05/01/2014		N/A
<a href="#">View</a>	2556041	Conduct Negotiations	In Progress	Application	2256738	06/12/2014		NA14GOT9990069
<a href="#">View</a>	2554004	Review Award Action Request	Not Started	Award Action Request	2256304			N/A
<a href="#">View</a>	2553976	Review Award Action Request	Not Started	Award Action Request	2256303			N/A
<a href="#">View</a>	2553942	Manage Review Event	In Progress	Review Event	2256285	02/10/2014		N/A



# 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	<a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">Add New</a>	

Attachments:

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

<a href="#">View</a>	<a href="#">Task Id</a>	<a href="#">Task Name</a>	<a href="#">Task Status</a>	<a href="#">Document Type</a>
<a href="#">View</a>	1365154	Certify/Revise Award File	Not Started	Award File
<a href="#">View</a>	1365050	Review Reviewer Instructions	Not Started	Review Instructions
<a href="#">View</a>	1365026	Certify/Revise Award File	Not Started	Award File

# Large File Guidance

*As a security measure, there is a 5 minute time limit for the download and upload of files. If the user uploads a file and it takes approximately 5 minutes, the file upload may appear to have been successful. To test the integrity of the uploaded file, download and attempt to open the file. If the file does not open, the file is probably corrupted – the attempt to upload was incomplete and therefore unsuccessful.*

## Solutions for File Upload Problems

- To determine if the upload process resulted in a corrupted file, download the recently-uploaded file and compare the size of that to the original file.
- If most of the file uploaded before failing (indicated by a slight variation in the size of the two files), attempt to upload the file when there is less Internet traffic.
- Use a faster Internet connection and try the upload process again.
- 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 Adobe Acrobat Professional or equivalent software is available; with the file open, from the File Menu, select Save as Other. From the subsequent dropdown menu, select Reduced Size PDF.
- **Options for recipients attempting to upload Progress Reports:**
  - Contact your Program Officer for acceptable options to upload the file (e.g., burn the document to a CD and mail to your Program Officer).
- **Options for Federal personnel:**
  - Contact the Help Desk to determine what additional solutions are available.

## Solutions for File Download Problems

- Download speeds are typically an order of magnitude faster than upload speeds; therefore, there should be fewer file download problems.
- Wait to download the file when there is less Internet traffic.
- Use a faster Internet connection to perform the download.
- Contact the Help Desk to determine what additional solutions are available.





## Federal Grants Personnel

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



## Grants Management Advisory Council (GMAC) Contacts

<b>NOAA/NESDIS</b>	<b>Ericka Rosier</b>	<b>301-683-3512</b>
<b>NOAA/NMFS</b>	<b>Dan Namur Melanie Gange</b>	<b>301-427-8730 301-427-8664</b>
<b>NOAA/NOS</b>	<b>Regina Evans Laurie Golden</b>	<b>301-713-3050 x183 301-713-3338 x151</b>
<b>NOAA/NWS</b>	<b>Carla Kirby</b>	<b>301-427-6923</b>
<b>NOAA/OAR</b>	<b>Brenda Alford</b>	<b>301-734-1174</b>
<b>NOAA/OED</b>	<b>Carrie McDougall Meka Laster</b>	<b>202-482-0875 301-628-2906</b>
<b>MBDA</b>	<b>Joann Hill Nakita Chambers</b>	<b>202-482-4826 202-482-0065</b>
<b>ITA</b>	<b>Brad Hess Annette Henderson</b>	<b>202-482-2969 202-482-3995</b>
<b>NTIA/BTOP</b>	<b>Wayne Ritchie Laura Pettus</b>	<b>202-482-5515 202-482-4509</b>
<b>EDA</b>	<b>Kerstin Millius</b>	<b>202-482-3280</b>

**NOTE:** Contact Name & Phone Number based upon Dept. of Commerce or NOAA Personnel Directories -- Accessed: April 7, 2015



# 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](mailto:GrantsOnline.Helpdesk@noaa.gov)
  - Call **301-444-2112** or **1-877-662-2478** toll free
  - Hours: **8:00 AM – 6:00 PM** Eastern Standard Time
- Ready to start working in Grants Online?
  - Go to <https://grantsonline.rdc.noaa.gov>



Grants Online User Roles - Federal

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

Grants Online User Roles - Grantee

<b>FUNCTIONS / ROLES</b>	<b>Recipient Auth Rep</b>	<b>Recipient Admin</b>	<b>Recipient PI/PPD</b>	<b>* Recipient PI/PPD - Submitting</b>	<b>Recipient Biz/Fin Rep</b>	<b>* Recipient Biz/Fin Rep - Submitting</b>	<b>Recipient Key Person</b>
<i>View Awards</i>	X	X	X	X	X	X	X
<i>Initiate Award Action Request</i>	X	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	X	
<i>Submit Financial Report</i>	X					X	

\* Recipient Administrator needs to confer "Submitting" Role

Grants Online User Role Definitions

ROLE NAME	DEFINITION
<b>ASAP Authorizer</b>	This role is given to the users who are responsible for the first step (ASAP Authorization) of the 2-step process used in setting up a new award in the ASAP System or adding funds to a current ASAP award. The second step is ASAP Certification performed by a user with a role of "Finance Office". The ASAP Authorizer is also responsible for releasing ASAP profiles as appropriate and reducing ASAP thresholds in the case of a reduction in funding.
<b>Budget Officer (Procurement Request Authorizing Official)</b>	The "Budget Officer" role in Grants Online is 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 approve the use of Program Office funds.
<b>CAMS First Approver CAMS Second Approver CAMS First and Second Approver</b>	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.
<b>CAMS First Approver - D CAMS Second Approver - D CAMS First and Second Approver - D</b>	These roles are given to users responsible for entering grant de-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.
<b>Credit Checker</b>	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.
<b>Director (EDA Only)</b>	This role is unique to EDA and is given to the user who has Director-level approval authority on award actions and payments.
<b>FALD</b>	This role is given to users in the Department's Financial Assistance Law Division who are assigned to a particular Bureau. For some Bureaus there are Bureau-level instead of Department-level attorneys given this role.
<b>Federal Program Officer - Certified</b>	This role is given to a user 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.
<b>Federal Program Officer - Uncertified</b>	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.
<b>Finance Office</b>	This role is given to the users who are responsible for the second step (ASAP Certification) of the 2-step process used in setting up a new award in the ASAP System or adding funds to a current ASAP award. The first step is ASAP Authorization.
<b>Finance Reviewer</b>	This role is given to users who perform the preliminary Finance Office review of Financial Closeout documents. Workflow routing of tasks to this user is controlled by the "Reconciliation" checkbox on the deobligation memo.

**Grants Online User Role Definitions**

<p><b>GMAC (Grants Management Advisory Committee)</b></p>	<p>This role is reserved for the official members of the NOAA Grants Management Advisory Committee and their designated back-ups, along with the points of contact for the non-NOAA Bureaus. There are usually one or two GMAC users within each Line Office. The users with this role are responsible for authorizing the addition, update, or removal of Grants Online users within their respective Line Offices. They also provide input in prioritizing Grants Online system enhancement tickets.</p>
<p><b>Grants Officer</b></p>	<p>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.</p>
<p><b>Grants Specialist</b></p>	<p>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.</p>
<p><b>NEPA Official/Coordinator</b></p>	<p>The NEPA Official reviews and approves the NEPA documentation as part of an Award File prior to submission to GMD.</p>
<p><b>OLA</b></p>	<p>This role is given to a proxy Grants Online user account used to document the Bureau-level Legislative Affairs step in a funded award file workflow. When a task is routed to the OLA user, Grants Online sends a record to the Legislative Affairs system called WebDocFlow. A Grants Online notification is also sent to the email address associated with that proxy user account. Legislative Affairs users then log into the WebDocFlow system to complete appropriate actions related to congressional notification of awards. When their actions are completed in WebDocFlow a message is passed back to Grants Online to move the award to the next step of the workflow.</p>
<p><b>OLIA</b></p>	<p>This role is given to a proxy Grants Online user account used to document the Department-level Legislative Affairs step in a funded award file workflow. When a task is routed from the OLA user to the OLIA user within WebDocFlow, a message is transmitted to Grants Online which correspondingly moves the workflow in Grants Online to the OLIA step. A Grants Online notification is also sent to the email address associated with the OLIA proxy user account. When the OLIA actions are completed in WebDocFlow a message is passed back to Grants Online to move the award to the next step of the workflow.</p>
<p><b>Program Office Requestor</b></p>	<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>
<p><b>Program Office Reviewer</b></p>	<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 Performance Progress Report (PPR) but has no other role in Grants Online.</p>
<p><b>Program Office Staff</b></p>	<p>This role is given to users who provide assistance to Federal Program Officers but do not have signature authority. They are able to create RFAs and/or Federal Funding Opportunity notices, input paper applications and approve (but not reject) Minimum Requirement Checklists, run the review process, and complete (but not certify) the PO checklist. Users with this role have the same access in Grants Online as users with the role of Uncertified Federal Program Officer, but are usually contract staff.</p>
<p><b>Progress Report Reviewer</b></p>	<p>This is a Federal Program Office role given to a user whose only responsibility is to review Performance 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>
<p><b>Public Affairs Liaison</b></p>	<p>This role is given to users who need to be notified about grant awards for the purposes of preparing press releases and/or other Public Affairs type activities which are separate and distinct from the Congressional notifications performed by the Legislative Affairs offices.</p>

**Grants Online User Role Definitions**

<b>Recipient Administrator</b>	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.
<b>Recipient Authorized Representative</b>	This role is intended for recipient users with signature authority to sign official grant documents such as an SF-424 (application), or countersign an Award document such as a CD-450 (new Award) or CD-451 (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.)
<b>Recipient Business/Finance Representative</b>	This role should be given to recipient users who need to fill out Financial Reports (SF-425 and SF-270). There are two versions of this role - users with a "submitting" role can submit Financial Reports directly to the Federal Agency; users without the "submitting" role can only forward the Financial Reports to their Authorized Representative who can in turn submit them to the Federal Agency.
<b>Recipient Principle Investigator</b>	This role should be given to recipient users who need to fill out Performance 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.
<b>RFA Publisher</b>	This role is given to users who are responsible for posting grant opportunity notices at <a href="http://Grants.gov">Grants.gov</a> .
<b>Selecting Official</b>	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.
<b>Vendor Control</b>	This role is given to Finance Officer users who create and update vendors in CBS to be associated with Grants Online Organizations on an "interfaced" award. Obligations for "interfaced" awards are created and modified via transactions sent via webservices between Grants Online and CBS. For "non-interfaced" awards the obligations are created and updated manually. Vendor Control users do not get workflow in Grants Online for "non-interfaced" awards.
<b>Vendor Validator</b>	This role is given to Tier3 Help Desk personnel in the Grants Online Program Management Office who perform data quality assurance tasks on Grants Online organization records before they are passed to the Vendor Control users in the Finance Office.
<b>View Program Office (Line Office, Agency)</b>	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).



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# Grants Online Training System Navigation

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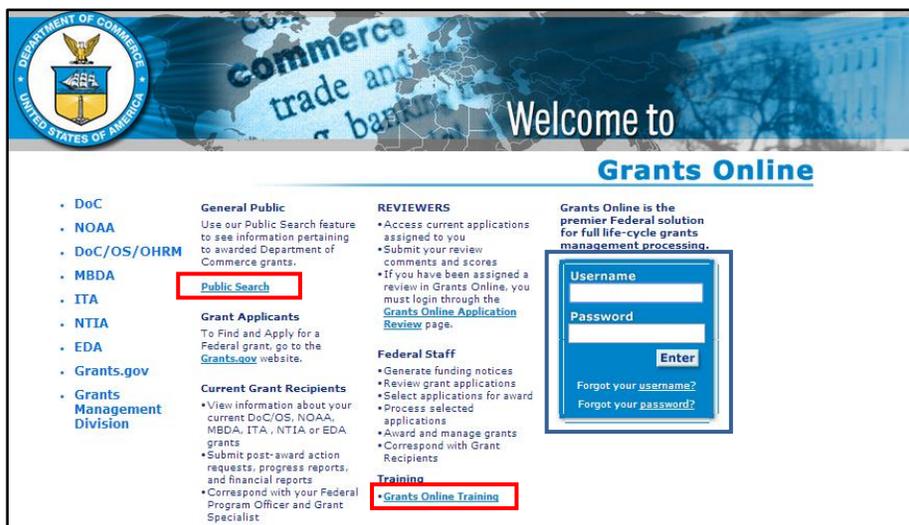
May 2015

## Objective

Provide the Federal Program Officer (FPO) with step-by-step instructions to navigate Grants Online.

## Accessing Grants Online

1. Click the Internet Explorer icon on your desktop or go to the Start Menu and locate the Internet Explorer icon. The Internet Explorer browser opens.
2. Type <https://grantsonline.rdc.noaa.gov> in the address bar of the browser and click the **Enter** button. The Grants Online home page/login screen appears.
3. Before logging into Grants Online, the user can access the public search feature, the Grants Online training page, and other useful links from this screen.



### Warning!

If the user enters his/her username or password incorrectly s/he will see a red error message on the screen. After three unsuccessful attempts to log in, the system locks the user out. The user must click on the "Forgot your password?" link and provide the correct responses to his/her security questions. If the issue is "Forgot your username?" click that link to obtain the Help Desk phone number.

## Grants Online Navigation Features

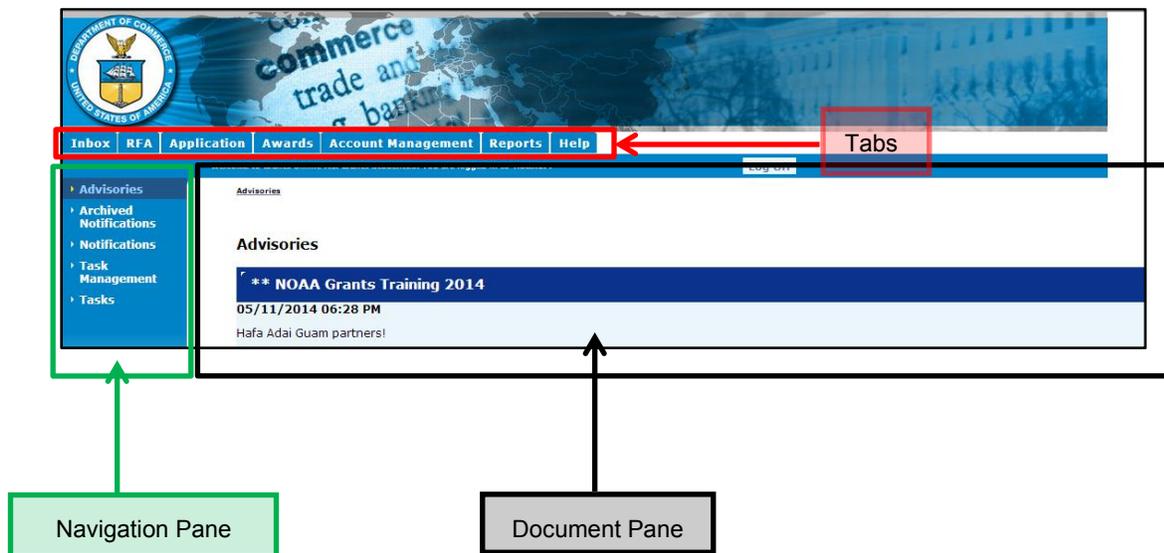
---

Access to certain Grants Online features is determined by the user's role. Each registered user is given a role and level of access sufficient to accomplish his/her assigned tasks.

### Screen Layout

When the user has successfully signed into Grants Online, the system will default to the Inbox Tab. Grants Online is divided into several content areas:

- **Tabs:** Highlighted by a red border at the top of the screen. Use the tabs to navigate to the different areas of Grants Online.
- **Navigation Pane:** Highlighted by a green border on the left-hand side of the screen. The options displayed in the navigation pane are determined by the active tab. Click on the desired link to go to that content area of Grants Online.
- **Document Pane:** Highlighted by a black border located in the middle of the screen. This is where most of the Grants Online details and information are displayed.



## Other User Interface Features

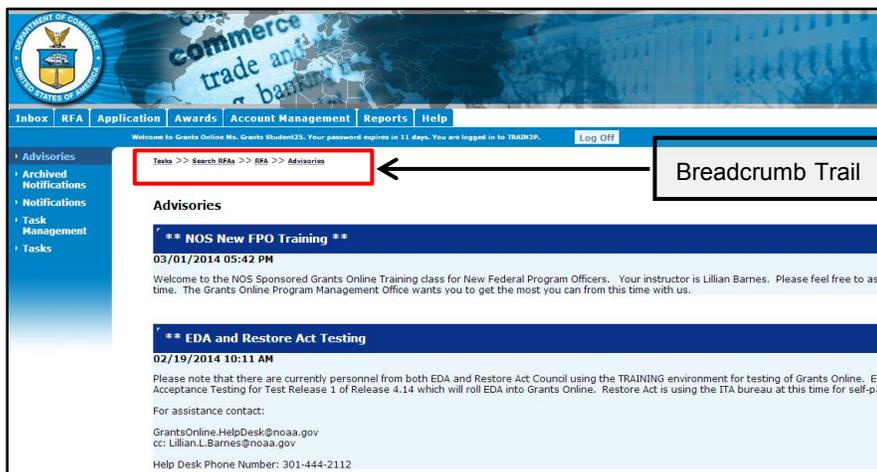
### Pop-Up Short Cuts

When the user places the cursor over a tab at the top of the screen, s/he will see a pop-up menu that contains the same links as the left navigation pane for that tab. This allows the user to navigate directly to a content area without first having to click the tab.



### Breadcrumbs

The Grants Online system keeps track of the pages the user has visited since s/he last signed on. The software puts a “breadcrumb trail” of those pages at the top of the document pane. This feature should be used instead of the browser’s “Back” button.



**Warning!**

Please **DO NOT** use the browser’s “Back” button in Grants Online. Using the browser’s “Back” button may sign you out of Grants Online.

## Help Tab

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When the user clicks the Help Tab, the following screen will display. Note the right side of the screen shows the Help Desk contact information and hours of availability. To access the Grants Online training, click the **Please click here to access Grants Online Training** link at the bottom of the screen.

The screenshot displays the Grants Online Help Desk interface. The top navigation bar includes tabs for 'Inbox', 'RFA', 'Application', 'Awards', 'Account Management', 'Reports', and 'Help', with the 'Help' tab highlighted. The main content area features a 'Welcome to Grants Online' message with the following contact information:

- Toll free: 1-877-662-2478
- Local (DC area): 301-444-2112
- Email: [GrantsOnline.HelpDesk@noaa.gov](mailto:GrantsOnline.HelpDesk@noaa.gov)
- Hours: Monday-Friday, 8:00 am to 6:00 pm Eastern

A note states: "Note: You must call (or send an email with a phone number where you can be reached) for a password reset. Security regulations prohibit sending passwords by email." Below this, it mentions: "Grants Online Help Desk personnel do not have expertise in the use of the Grants.gov application submission system. For questions regarding Grants.gov, please call the Grants.gov Help Desk at 1-800-518-4726." At the bottom of the page, a link reads "Please click here to access Grants Online Training".

## Inbox Tab

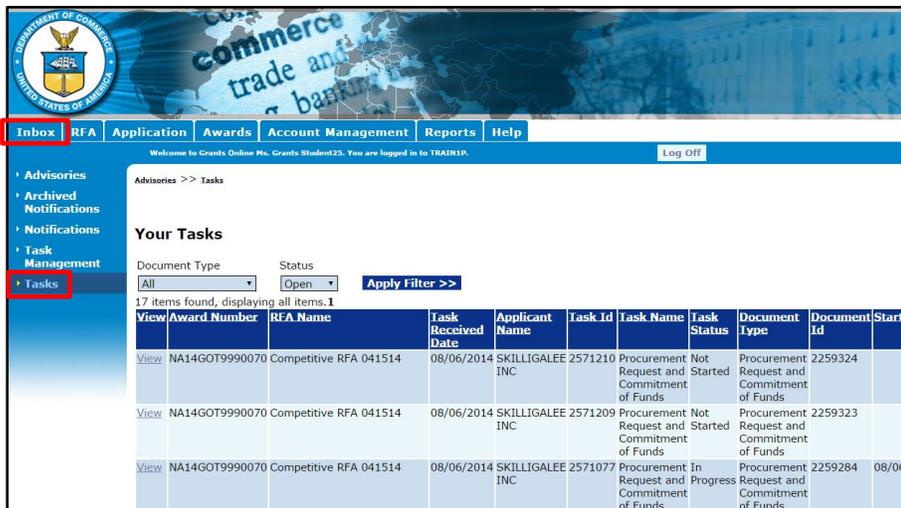
---

### Tasks

Notifications alert the user to an action or task they must complete. When a user selects a task, s/he has the opportunity to complete the action that is been assigned to him/her within the workflow.

### Access a Task

1. From the Inbox Tab, click the **Tasks** link. A list of the user's available tasks is displayed.



Department of Commerce  
United States of America  
commerce  
trade and  
banking

**Inbox** RFA Application Awards Account Management Reports Help

Welcome to Grants Online Ms. Grants Student23. You are logged in to TRAIN1P. [Log Off](#)

Advisories >> Tasks

**Your Tasks**

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

17 items found, displaying all items. 1

View	Award Number	RFA Name	Task Received Date	Applicant Name	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571210	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2259324	
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571209	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2259323	
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571077	Procurement Request and Commitment of Funds	In Progress	Procurement Request and Commitment of Funds	2259284	08/06/2014



**NOTE:** To customize the look and feel of Grants Online, use the Account Management Tab. Details associated with the Account Management Tab are covered later in this document.

## View a Task

1. Click the **View** link next to the task you wish to view.

**Your Tasks**

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

17 items found, displaying all items.1

<a href="#">View</a>	Award Number	REA Name	Task Received Date	Applicant Name	Task Id	Task Name	Task Status	Document Type	Document Id	Start
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571210	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2259324	
<b><a href="#">View</a></b>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571209	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2259323	
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571077	Procurement Request and Commitment of Funds	In Progress	Procurement Request and Commitment of Funds	2259284	08/06/
<a href="#">View</a>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571076	Review Release of Funds	Not Started	Award File	2259283	

## Filter a Task

1. Specify the Document Type from the dropdown list.
2. Specify the Status from the dropdown list.
3. Click the **Apply Filter** button.

**Your Tasks**

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

4. The **Tasks** screen shows only the filtered tasks. **NOTE:** In this example, only the Open RFAs are visible.

**Your Tasks**

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

4 items found, displaying all items.1

<a href="#">View</a>	RFA Id	RFA Name	RFA Type	Task Id	Task Name	Task Status	Document Type	EFO Id	Document Id
<a href="#">View</a>	2259009	Student25_080414_Universal	N	2569643	Notify Recipients	In Progress	RFA		2259009
<a href="#">View</a>	2256808	test 0508	N	2564265	Notify Recipients	In Progress	RFA		2256808
<a href="#">View</a>	2256757	Universal RFA 042914	N	2556044	Notify Recipients	In Progress	RFA		2256757
<a href="#">View</a>	2256176	Great Day For FPO Training (GDFFT)	N	2553586	Notify Recipients	In Progress	RFA		2256176

## Account Management Tab

The Account Management Tab allows the user to view and update his/her profile; customize his/her notifications and tasks preferences; and delegate his/her Inbox to other users.

The screenshot shows the Grants Online interface with the 'Account Management' tab selected. The navigation bar includes 'Inbox', 'RFA', 'Application', 'Awards', 'Account Management', 'Reports', and 'Help'. A welcome message states: 'Welcome to Grants Online Ma, Grants Student25. Your password expires in 11 days. You are logged in to TRAINIP. Log Off'. The main content area is titled 'Account Management' and contains three sections: 'My Delegations', 'My Preferences', and 'My Profile'. Each section has a brief description of its functionality.

## Access the User Profile

1. On the Account Management Tab, click the **My Profile** link. The Manage Profile screen is visible.

The screenshot shows the 'Manage Profile' screen. The 'Security Questions' section is highlighted with a red box. A red arrow points from the text box on the right to the 'Edit Security Questions' link. The 'Security Questions' table is as follows:

#	Question Text	Answer Text
1	What are the first three letters of the month in which your father was born?	JAN
2	What are the first three letters of the month in which your mother was born?	FEB
3	What is your youngest sister's birthday (MM/DD)?	01/02

Below the security questions is an 'Assigned Roles' table:

Role	Org ID	Organization
Federal Program Officer - Certified	1001330	Fisheries NOAA Chesapeake Bay Office (NCBO)

To reset his/her password, the user must provide correct responses to all security questions.

If the user contacts the Help Desk for assistance with the password reset, s/he must provide an accurate response to all security questions. This ensures the Help Desk the user has the right to access the Grants Online account.



**NOTE:** If a user wishes to change Program Office roles and/or affiliations, s/he must contact his/her Grants Management Advisory Council (GMAC) representative. That person will contact the Help Desk on behalf of the user.

## Edit the User Profile

1. From the Manage Profile screen, click the **Edit** link.


(No Comments) **Manage Profile** [Edit >>](#)

Prefix: Ms.  
 First Name: Grants  
 Middle Name:  
 Last Name: Student25  
 Affix:  
 Person ID: 2010915

**User Account Details**  
 User Name: gstudent25  
 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](#)

2. Click the **Details** link.

**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
<a href="#">Details</a>	2002468	GOT One Commerce Program Office (OCPO)		301-555-1212	20020 Century Blvd, Germantown, MD 20874-1143 USA	testemail@msg2.rdc.noaa.gov

3. When the screen shown below displays, click the **Edit** link.

**Affiliation** [Edit >>](#)

Organization: GOT One Commerce Program Office (OCPO)  
 Primary Flag: true  
 Active Flag: true \* *Primary affiliation must be active.*  
 Title:  
 Street Address:   
 City: Germantown  
 State: MD  
 Zip: 20874-1143  
 Country: USA  
 Mail Route:  
 Phone Number: 301-555-1212  
 Alternate Phone Number:  
 Fax Number:  
 E-Mail: testemail@msg2.rdc.noaa.gov  
 Alternate E-Mail:  
[Cancel](#)

4. Make the necessary changes and click the **Save** button. If the user opts to click the **Cancel** button, changes are not saved.

**Affiliation** [View >>](#)

Organization GOT One Commerce Program Office (OCPO)  
 Primary Flag true  
 Active Flag true \* Primary affiliation must be active.  
 Title   
 Street Address \*   
 City \*   
 State \*   
 Zip \*   
 Country \*   
 Mail Route   
 Phone Number \*  Extension   
 Alternate Phone Number  Extension   
 Fax Number   
 E-Mail \*   
 Alternate E-Mail

**Save** **Cancel**

5. Click the **Done** button to finalize the process and return to the main Account Management screen.

**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
<a href="#">Details</a>	2002468	GOT One Commerce Program Office (OCPO)		301-555-1212	20020 Century Blvd, Germantown, MD 20874-1143 USA	testemail@msg2.rdc.noaa.gov

**Assigned Roles**

Role	Org ID	Organization
Federal Program Officer - Certified	2002468	GOT One Commerce Program Office (OCPO)

**Done**

## User Preferences

The user may customize his/her viewing preferences by using the My Preferences link. The user may add/remove email Inbox notifications. This will remove notifications sent to the user's external email account only. Headings may be customized to display certain fields on the user's tasks and notifications screens. Additionally, the user may change his/her Grants Online password.

### Access User Preferences

1. From the Account Management Tab, click the **My Preferences** link. The screen shown below is visible. At this point, the user can customize the page size, number of breadcrumbs, the look and feel, and the workflow warning.

**User Preferences**  
Site Preferences

---

**Page Size**  [\[+\]](#)

**Number of Bread Crumbs**  [\[+\]](#)

**Look and Feel**  [\[+\]](#)

**Workflow Warning**  [\[+\]](#)

2. Scroll to the bottom of the screen and click the **Save** button to capture the changes.

**Award Tasks**

Available Columns	Selected Columns
<div style="border: 1px solid black; padding: 5px; min-height: 100px;"> <p>----- Please select an inbox column -----</p> <ul style="list-style-type: none"> <li>Project Title</li> <li>Proposal Number</li> <li>Total Federal Funding</li> <li>Approved Federal Funding</li> <li>Applicant Name</li> <li>Task Received Date</li> <li>Award Start Date</li> </ul> </div>	<div style="border: 1px solid black; padding: 5px; min-height: 100px;"> <p>----- Please select an inbox column -----</p> <ul style="list-style-type: none"> <li>Task Id</li> <li>Task Name</li> <li>Award Number</li> <li>Status</li> <li>Document Id</li> <li>Document Type</li> <li>Start Date</li> <li>Completed Date</li> </ul> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>&gt;&gt;</span> <span>&lt;&lt;</span> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>Up</span> <span>Down</span> </div>

**Post Award Tasks**

Available Columns	Selected Columns
<div style="border: 1px solid black; padding: 5px; min-height: 100px;"> <p>----- Please select an inbox column -----</p> <ul style="list-style-type: none"> <li>Project Title</li> <li>Proposal Number</li> <li>Total Federal Funding</li> <li>Approved Federal Funding</li> <li>Applicant Name</li> <li>Task Received Date</li> <li>Award Start Date</li> </ul> </div>	<div style="border: 1px solid black; padding: 5px; min-height: 100px;"> <p>----- Please select an inbox column -----</p> <ul style="list-style-type: none"> <li>Task Id</li> <li>Task Name</li> <li>Award Number</li> <li>Task Status</li> <li>Document Id</li> <li>Document Type</li> <li>Start Date</li> <li>Completed Date</li> </ul> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>&gt;&gt;</span> <span>&lt;&lt;</span> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>Up</span> <span>Down</span> </div>

Save

## Customize Tasks

1. The user can modify his/her notifications by clicking on the **Notification Preferences** link (top portion of the image below). The modifications only impact the user's email Inbox; the Grants Online Inbox specifications cannot be modified.
2. The user can modify the type and order of preferences that display on the screen. To do so, click the **Task Preferences** link (bottom portion of the image below). The user can modify his/her preferences for General Tasks, RFA Tasks, Award Tasks, and Post Award Tasks.

The screenshot shows two main sections: Notification Preferences and Task Preferences. Red arrows point to the 'Notification Preferences' and 'Task Preferences' links.

**Notification Preferences**

	Grants Online Inbox	Email Inbox
<b>System Generated Advisories</b>		
Password Expiration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Scheduled Downtime	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Policy Update	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>System Generated Workflow</b>		
Task Assignment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Item Submission	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delegation of Work	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>System Generated Notices</b>		
Expired Certification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pending Due Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Overdue Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Task Preferences**

**General Tasks**

Available Columns: Project Title, Proposal Number, Total Federal Funding, Approved Federal Funding, Award Start Date, Competition Name

Selected Columns: Award Number, RFA Name, Task Received Date, Applicant Name, Task Id, Task Name, Task Status, Document Type, Document Id, Start Date, Completed Date

Buttons: >>, <<, Up, Down

3. For the **Task Preferences**, use the Push [**>>**] and Pull [**<<**] functionality to specify the columns that will display in the user's Inbox.
4. For the **Task Preferences**, use the Up **Up** or Down **Down** buttons to select the column order that should be displayed in the user's Inbox.
5. Click the **Save** button at the bottom of the screen.

The screenshot shows the 'Post Award Tasks' section of the Task Preferences interface.

**Post Award Tasks**

Available Columns: Project Title, Proposal Number, Total Federal Funding, Approved Federal Funding, Applicant Name, Task Received Date, Award Start Date

Selected Columns: Task Id, Task Name, Award Number, Task Status, Document Id, Document Type, Start Date, Completed Date

Buttons: >>, <<, Up, Down

**Save**

## Change the Password

1. Click the **Change Password** button on the User Preferences screen.

The screenshot shows the 'User Preferences' section with 'Site Preferences' expanded. It contains four settings: 'Page Size' (100), 'Number of Bread Crumbs' (20), 'Look and Feel' (DOC), and 'Workflow Warning' (Yes). At the bottom, a blue 'Change Password' button is highlighted with a red rectangular box.

2. When the change Password screen is visible, specify data for mandatory data fields – indicated by a red asterisk (\*).
  - Enter the old password\*.
  - Enter the new password\*.
  - Enter the new password again to confirm\*.
3. Click the **Submit** button.

The screenshot shows the 'Change Password' form. It has three input fields: 'Old Password :\*', 'New Password :\*', and 'Confirm New Password :\*'. To the right, 'Password Guidelines :' are listed. At the bottom, there are 'Submit' and 'Cancel' buttons, with 'Submit' highlighted by a red box. A note at the bottom states: 'NOTE: Once the password is successfully modified you will be redirected to login page'.

**Change Password**

Old Password :\*

New Password :\*

Confirm New Password :\*

**Submit** **Cancel**

NOTE: Once the password is successfully modified you will be redirected to login page

**Password Guidelines :**

- Passwords must contain at least twelve (12) non-blank characters.
- Passwords cannot contain quotation marks.
- Passwords are case sensitive.
- A Password must begin with an alphabetic character.
- At least one of the characters must be a number(0-9).
- At least one of the characters must be a special character. The only special characters allowed are underscore "\_", dollar sign "\$", and pound sign "#".
- Six of the characters may only occur once in the password.
- At least 3 characters must be different than the previous password.
- Passwords must not contain the user's account name or parts of the user's full consecutive characters.



**NOTE:** Follow the Password Guidelines as detailed on the upper right-hand side of the screen. **ONLY** the following special characters are valid: underscore "\_", dollar sign "\$", and pound sign "#".

## User Delegations

When the user selects the **My Delegations** link on the Account Management Tab, s/he will be able to view existing delegates, add delegates, and rescind delegates. A user can only select as a delegate a person with an access level that matches his/hers. For example, a certified Program Officer cannot delegate to someone who has a lower level of access (e.g., an uncertified Program Officer or a program office staff member). In addition to an equivalent level of access, the delegate must have the same organizational affiliation as the delegator.

### Access User Delegations

1. From the Account Management Tab, click the **My Delegations** link. The Delegate Authority screen is visible.

**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: 

- ASAP Authorizer
- Award Mailer
- Budget Officer

### Add A Delegate

1. Search for the user(s) who will be chosen as a delegate using the first name, last name, organization or role.
2. Click the **Find Peers** button.

**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: 

- ASAP Authorizer
- Award Mailer
- Budget Officer

**Find Peers**

- When the search results are returned, choose the user(s) you would like to assign as a delegate. Click the **Delegate** button.

**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:   
 ASAP Authorizer  
 Award Mailer  
 Budget Officer

**Find Peers**

**Search Results**

Grants Student00  
 Grants Student01  
 Grants Student02  
 Grants Student03

**Delegate**

- The screen shot below is visible when a person is successfully chosen as a delegate. To specify additional delegates, repeat steps 2-3 as many times as is necessary.

**Delegate Authority**

**Current Peers on delegation List:**

Action	Prefix	Affix	Name	Phone	Email	Fax	Title	Organization
Rescind			Grants Student00	301-555-1212	testemail@msg2.rdc.noaa.gov			GOT One Commerce Program Office

**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:   
 ASAP Authorizer  
 Award Mailer  
 Budget Officer

**Find Peers**

## Rescind A Delegation

1. From the Account Management Tab, click the **My Delegations** link. The Delegate Authority screen is visible. If the user has assigned one or more person(s) as a delegate, the **Current Peers on Delegation List** will display; otherwise, the user is only presented with the option to Search for Peers.
2. Click the **Rescind** link next to the name of the individual(s) you would like to remove as a delegate.

**Delegate Authority**

**Current Peers on delegation List:**

Action	Prefix	Affix	Name	Phone	Email	Fax	Title	Organization
<a href="#">Rescind</a>			Grants Student00	301-555-1212	testemail@msg2.rdc.noaa.gov			GOT One Commerce Program Office

**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:

- ASAP Authorizer
- Award Mailer
- Budget Officer

[Find Peers](#)

## Log In As A Delegate

1. The user should log in to Grants Online with his/her normal user name.
2. Click the **OK** button on the Notice to Users page.
3. Choose to continue as yourself (click the **Continue to Inbox** link).

-Or-

Access Grants Online as the person who assigned you authority to access his/her account (click the **Select** link next to the person's name).

**Choose Active User**

Other users have chosen to delegate their work to you.  
You may choose to work as one of the users listed below.  
Otherwise, choose 'Continue to Inbox' to work as yourself.

Select	User Name
Select	Grants Student00

[Continue to Inbox >>](#)



**NOTE:** When a user is signed into Grants Online as a delegate, the system will identify him/her as a delegate of that individual (see below). The tasks displayed on the screen are the tasks the delegate may perform on behalf of the original user. Both the user and the delegate can work in Grants Online simultaneously.

**OPERATING AS DELEGATE FOR Grants Student00. You are logged in to TRAIN2P.**

**Your Tasks**

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

124 items found, displaying 1 to 100. [\[First/Prev\]](#) 1, 2 [\[Next/Last\]](#)

View	Award Number	Proposal Number	Task Received Date	Start Date	Task Id	Task Name	Task Status	Document Type	Document Id	Applicant Name
<a href="#">View</a>	N/A	N/A	09/06/2014		2572977	Notify Recipients	Not Started	RFA	2258903	N/A
<a href="#">View</a>	N/A	N/A	08/06/2014	08/06/2014	2571285	Manage Review Event	In Progress	Review Event	2258327	N/A
<a href="#">View</a>	N/A	N/A	08/06/2014	08/06/2014	2571283	Conduct Negotiations	In Progress	Application	2258329	bangor - lillian



## Federal Program Officer Training Agenda

Day 1 - PM

<b>Session 2: Universal RFA Creation / Application Processing 10:30 am – 4:30 pm</b>	
<b>Topic</b>	<b>Duration</b>
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 RFAs
- Be able to input a paper application and complete the “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



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

---

**May 2015**

## **Universal and Competitive RFA Fields Posted to Grants.gov**

- Opportunity Number – ***Federal Opportunity Number***
- Opportunity Title – ***RFA Name***
- Opportunity Category – (Competitive RFA → ***“Discretionary”***; ***Universal RFA*** → ***“Other”***)
- 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 application forms)***
- Email Address – ***Email address of Agency Contact***
- Open Date – ***Most of the time, same as the 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:**

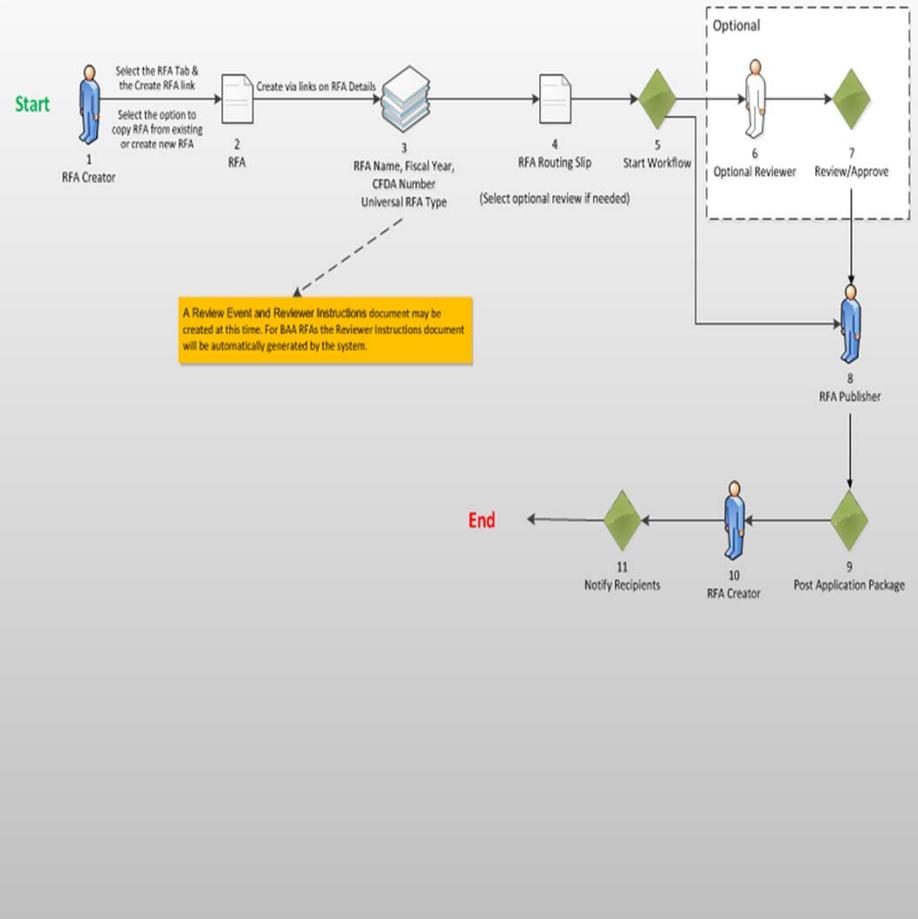
1. The Assigned Program Officer for the RFA must be a “Certified FPO” to advance documents to the next step in the workflow process.
2. For both Universal and Competitive RFAs the user should know the person(s) in his/her Program Office who will receive the application(s) for the initial Minimum Requirements Check.



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

5/11/2015

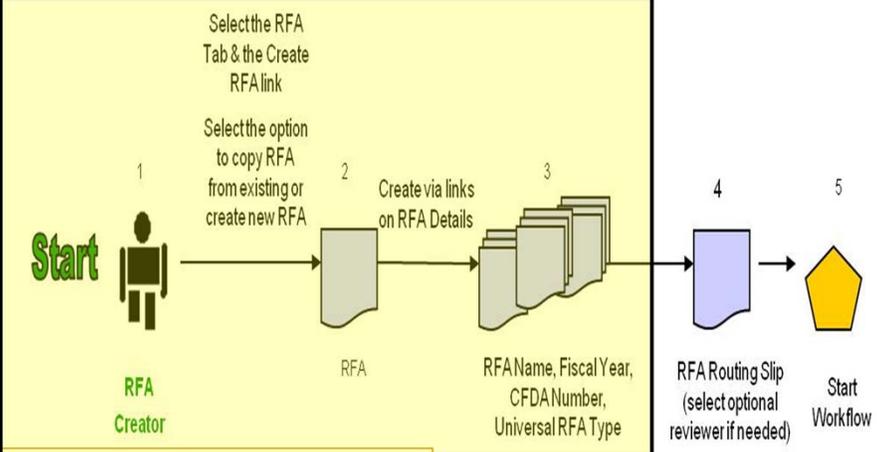
Version 4.15





Select the RFA Tab & the Create RFA link

Select the option to copy RFA from existing or create new RFA



### RFA Details

**RFA Header Information**

Document ID: 2199733

RFA Name:

Fiscal Year:

Announcement Type: I

Funding Opportunity Number: NOAA-GOT-OCPO-2011-2002849

Line Office: Grants Online Training (GOT)

Assigned Program Office:

Assigned Program Officer:

CFDA Number:

SubProgram:

RFA Type:

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

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

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

**Minimum Requirements \***

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

[View/Edit](#)

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

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

**Attachments:** No attachments.

Add new Attachment:

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

**RFA Additional Information**

Anticipated Funding Amount for All Recipients:

Application Due Date:

Anticipated Award Date:

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

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

**Recipient Information/Application Data** [Add New](#)

**Search Addresses**

Program Office Name:

Street Address:

City:

State:

Zip:

**Search Results**

Nothing found to display.

**Selected Addresses for this RFA**

One item found: 1

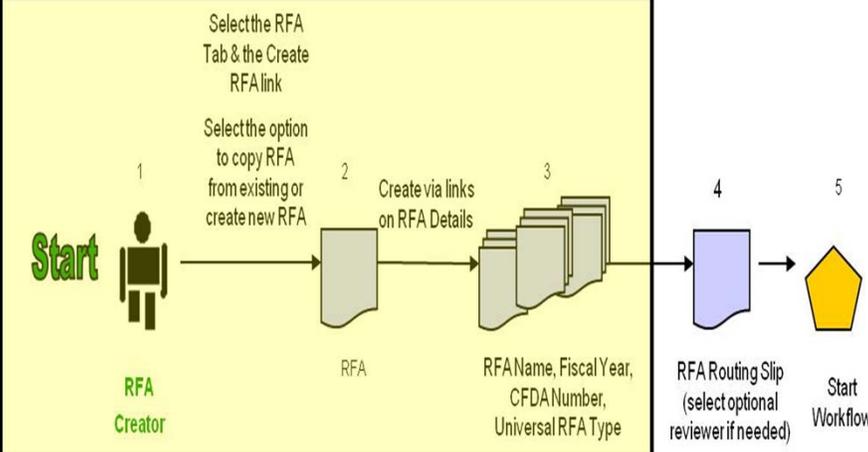
Program Office Name	Address
<input type="checkbox"/>	GOT One Commerce Program Office (OCPO) 20020 Century Blvd, Germantown, MD 208

When adding a recipient to the RFA use the DUNS number to perform the lookup.



Select the RFA Tab & the Create RFA link

Select the option to copy RFA from existing or create new RFA



#### Application Package

Select a Form Family : \*

Select a Template : \*

**Mandatory Forms**

Budget Narrative Attachment Form

CD-511

Project Narrative Attachment Form

SF-424

SF-424A

SF-424B

**Optional Forms**

Other Attachments Form

SF-LLL

**Attachments:**

For Universal RFAs, you may attach Application Instructions to the RFA. Use Application Instructions as the short description. Only one file may be attached at Grants.gov as Application Instructions. The preferred file format is pdf.

#### Matching Requirement

Statutory Authority : \*

Minimum Cost Share (%) : \*

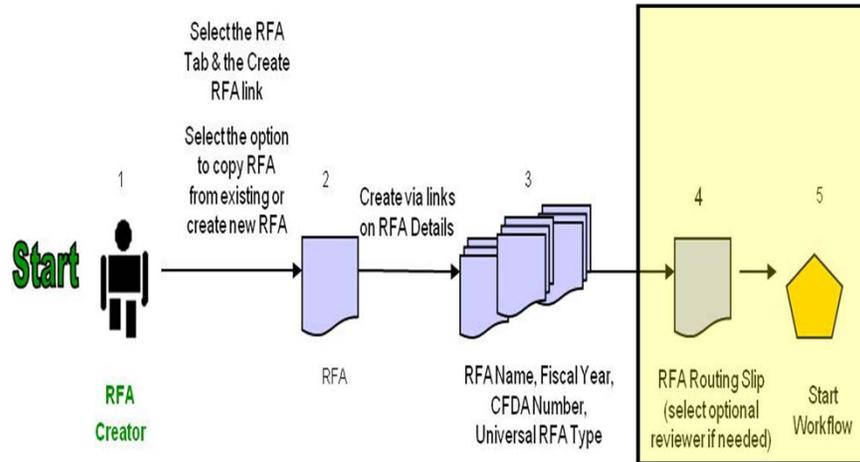
Maximum Cost Share (%) : \*

#### Special Award Condition Details

Name : \*

Description : \*

Most NOAA Program Offices use the Standard Non-Construction application package. If the Program Office has specific instructions for the recipient they may be attached to 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.

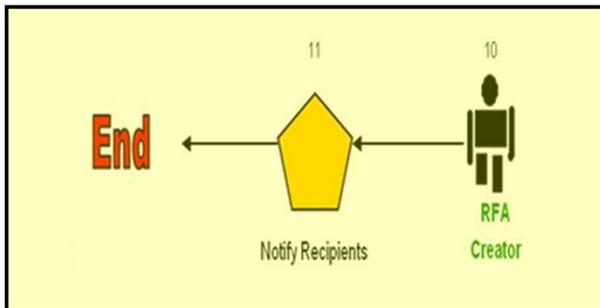
[Add Optional Reviewer](#)

#### 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
<a href="#">View</a>	Notify Recipients	N/A	02/03/2011	RFA	N/A	Not Started	2199733	1795365			N/A	N/A

**RFA**

**Id:** 2199733

**Status:** Notify/Recipients - 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 Application Package	02/03/2011 05:37:05 PM	02/03/2011 05:37:39 PM	02/03/2011 05:37:39 PM	Steve John Drescher	RFAPublisher	ApplicationPackagePosted	Complete	
Approve or Review	02/03/2011 05:36:41 PM	02/03/2011 05:37:04 PM	02/03/2011 05:37:04 PM	Grants Student	RFACreator	InitiateApplicationPackagePosting	Complete	

Export options: [Excel](#)

## Grant Recipient Email

From: GrantsOnLine.test@noaa.gov (GrantsOnLine.test@noaa.gov)  
 To: grant.recipient@yahoo.com  
 Date: Wednesday, December 10, 2014 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 and you have been selected by the posting Program Officer for notification.

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

To retrieve an application package from the Grants.gov home page:

1. From the Grants.gov home screen, click the **Applicants** tab.
2. The user may click either the **Search for Grant Opportunities** link or the **Apply for a Grant Opportunity Today** link.
3. If the user selects the **Apply for a Grant Opportunity Today** link, click the **Download Application Package** button.
4. Enter the Funding Opportunity Number:
  - NOAA-ONPO-2015-2001279
5. From the Actions column, click the **Select Application Package to Download** link.
6. The user should supply his/her email address so s/he can be notified of changes to the application before the closing date. If the user does not provide an email address, s/he cannot be apprised of changes to the application requirements. This limits his/her knowledge of **all** conditions that must be met to be selected for an award.
7. Click the **Download Application Instruction** link.
8. Click the **Download Application Package** link.
9. Complete the fillable pdf form and submit.

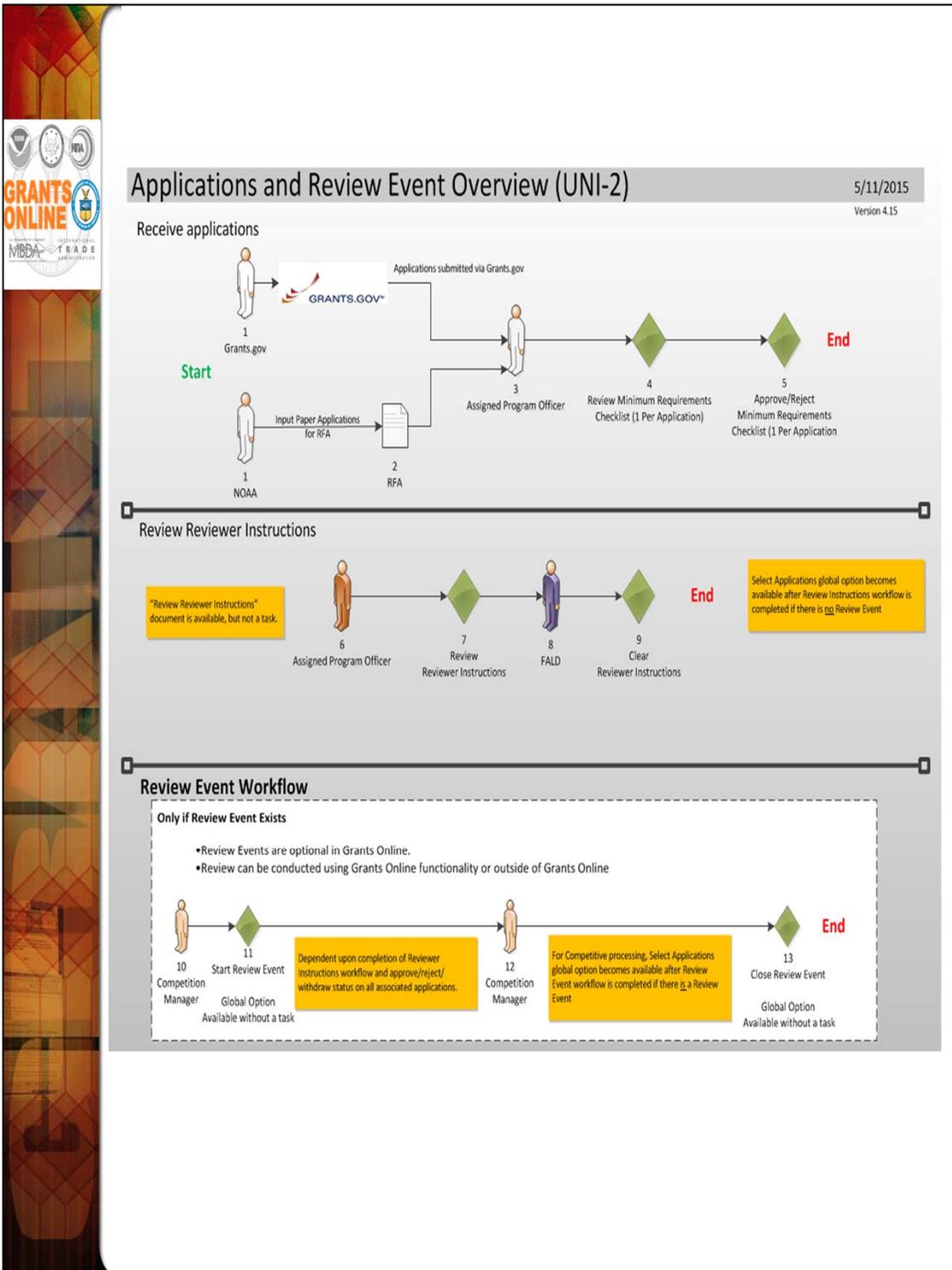
Information on the NOAA Request for Applications (RFA):

**RFA Name:** Generate a Sample Notification  
**Fiscal Year:** 2015  
**CFDA Number:** 11.999  
**Opportunity Number:** NOAA-ONPO -2015-2001279  
**Agency:** National Oceanic and Atmospheric Administration  
**Opening Date:** 2014-12-10 08:54:01.0  
**Pgm Office:** One NOAA Program Office (ONPO)  
**Pgm Officer:** Program Officer  
**Closing Date\*:** 2015-09-30 17:30:00.00

**\*NOTE:** Please contact the NOAA Program Officer for verification of when an application must be submitted for timely award processing.

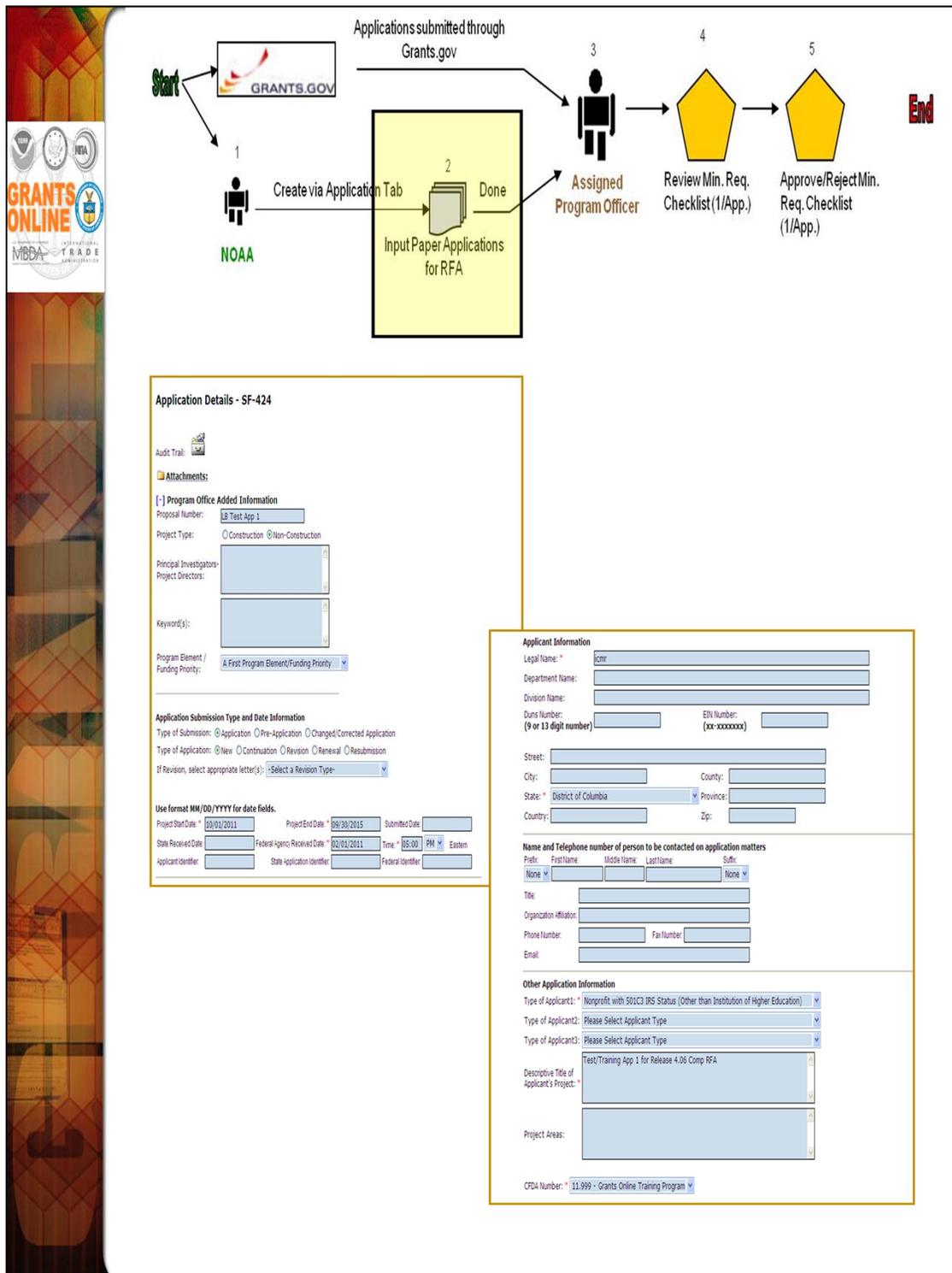
For further information contact:

**Name:** Program Officer  
**Phone:** 301-555-1212  
**Address:** 14th Street & Constitution Avenue, NW  
 Washington, DC 20230  
**Email:** federal.program.officer@noaa.gov



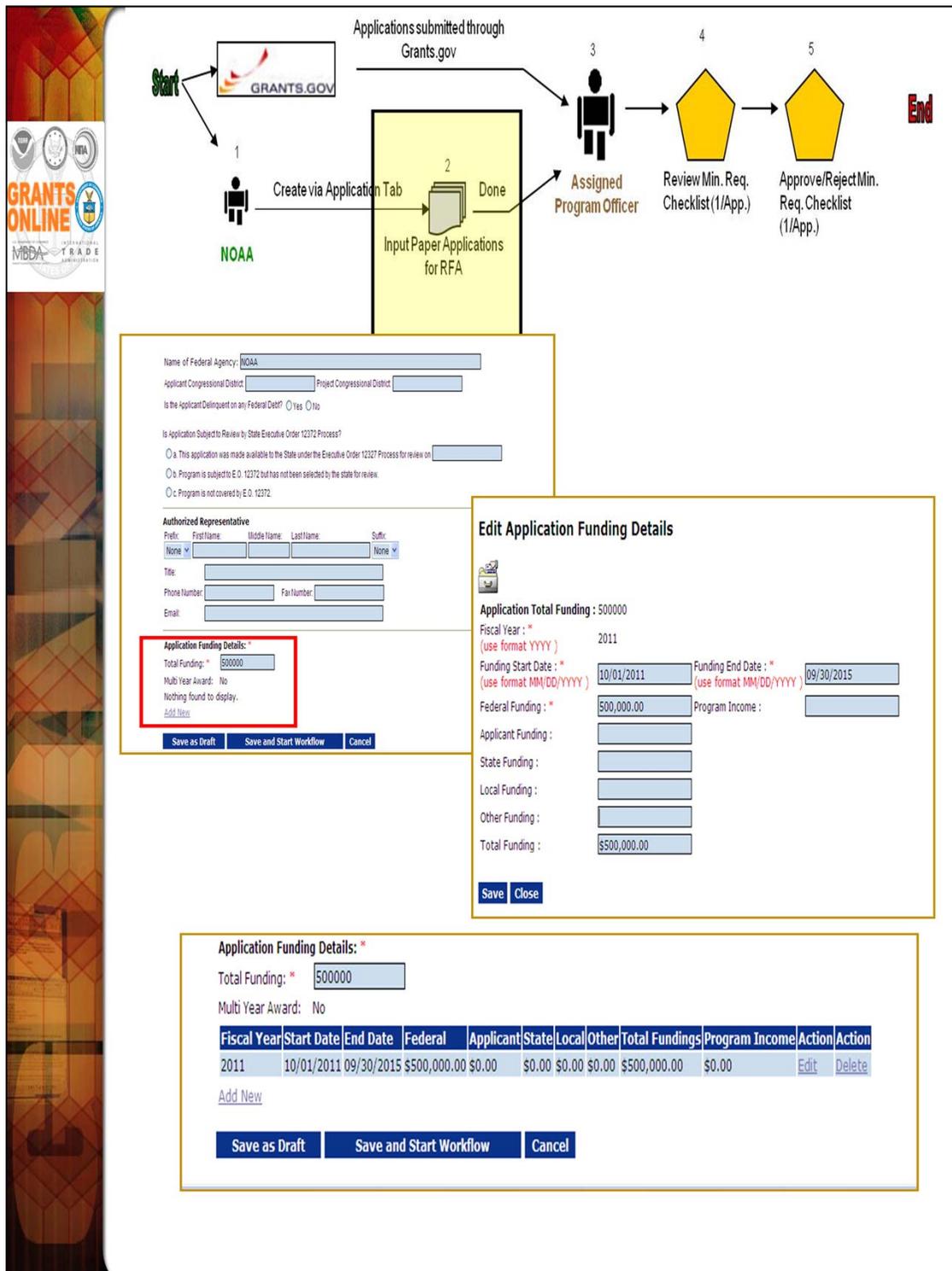
We will use the sample application in the training package for data entry.

A review event is optional for the Universal process.

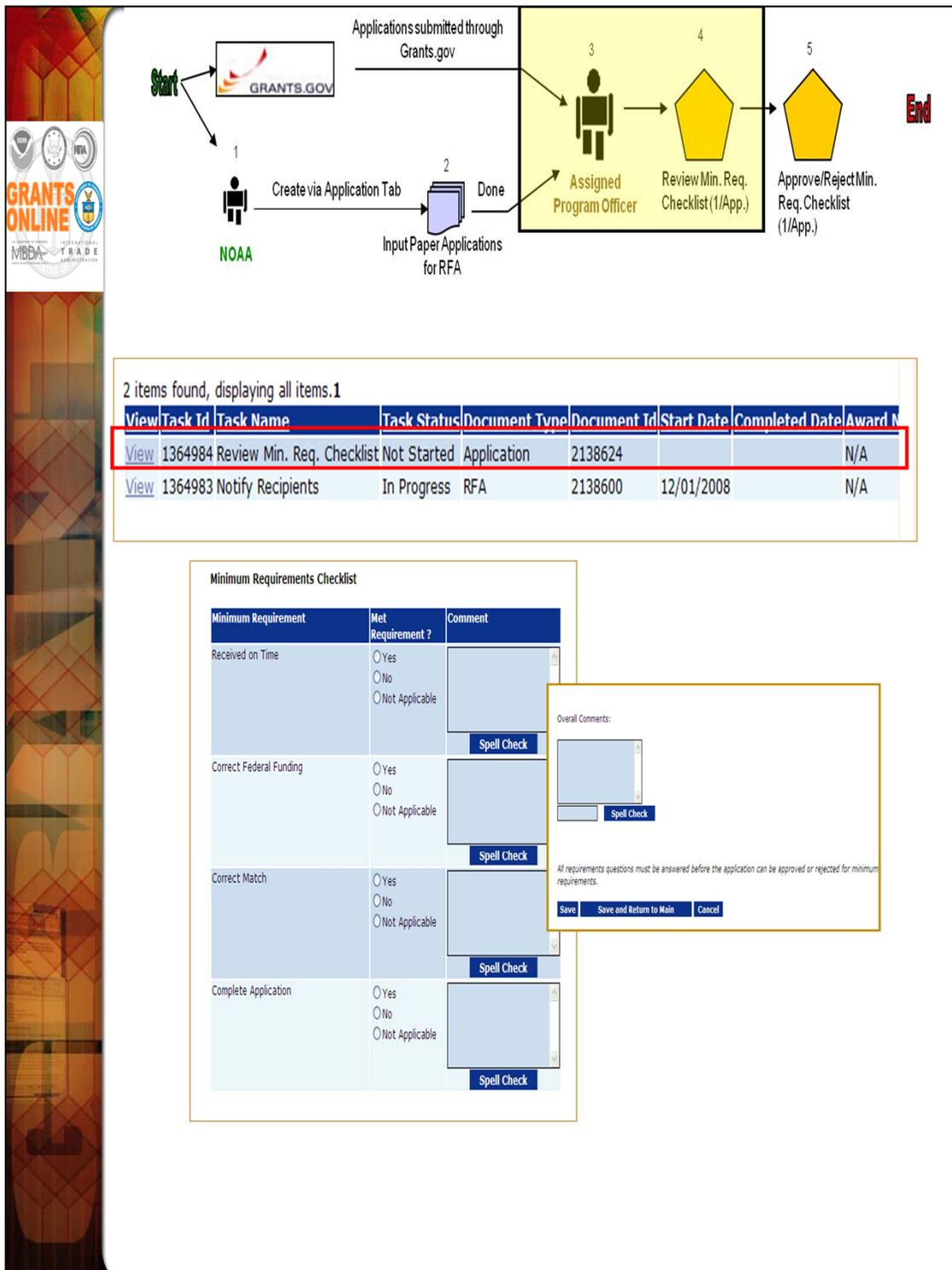


To start, select the “Input Paper Applications” menu item from the Application tab. The data on the Application Details screen will already be filled in if the application was exported from Grants.gov. However, if a paper application is received by the Program Office the data must be entered on this screen. Only the 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 all required fields, click “Save as Draft.” If you have missed any required fields you will see an error message with guidance regarding the missing fields.



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



If the “No” radio button is selected on any of the items comprising the Minimum Requirements Checklist, a comment should be entered in the associated comments box or in the Overall Comments box (typically at the bottom of the screen). The user will not be allowed to save the screen without a comment if a “No” radio button has been selected.

# Federal Grants System DUNS Relationships

An award must be linked to the **SAME DUNS** Number in all Federal Systems



Applicant obtains DUNS # from Dun and Bradstreet

ASAP ID linked to **one** DUNS and Grant Number (previously allowed two DUNS #s)



Applicant Registers in SAM using the EIN or DUNS.

Grants Online info is manually checked against the SAM record.



ASAP ID



Grants Online Org is linked to CBS Vendor which is linked to ASAP ID all using the DUNS Number

GRANT #, DUNS



GRANT #, DUNS



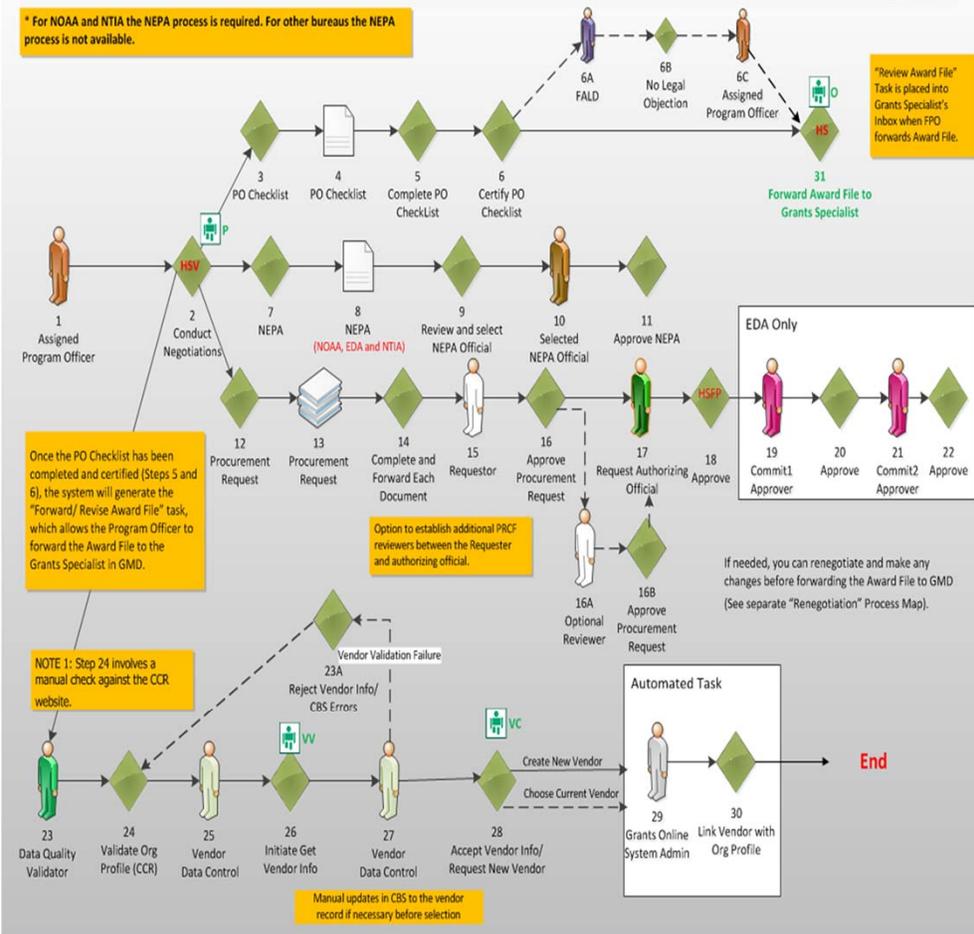


# Prepare Applications for Funding Overview (UNI-3)

5/11/2015

Version 4.15

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



Once the PO Checklist has been completed and certified (Steps 5 and 6), the system will generate the "Forward/ Revise Award File" task, which allows the Program Officer to forward the Award File to the Grants Specialist in GMD.

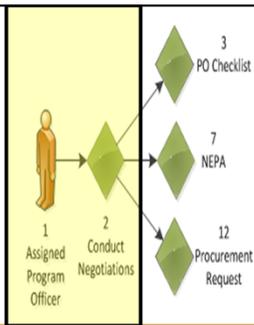
NOTE 1: Step 24 involves a manual check against the CCR website.

Option to establish additional PRICF reviewers between the Requester and authorizing official.

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

Manual updates in CBS to the vendor record if necessary before selection

"Review Award File" Task is placed into Grants Specialist's Inbox when FPO forwards Award File.



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
<a href="#">View</a>	Conduct Negotiations	N/A	02/05/2011	Application	LB Universal2 RFA App	Not Started	2199761	1795527			icmr	LB Univ2 App
<a href="#">View</a>	Notif. Recipients	N/A	02/05/2011	RFA	N/A	In	2100760	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:   Eastern  
 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.  
 Note: If this is a Continuation or Supplemental, skip this step and click on the "Associate Award Number" button at bottom.  
 Department Name:   
 Division Name:   
 Duns Number: \*  (9 or 13 digit number) EIN Number: \*  (xx-xxxxxxx)  
 Street:   
 City:  County:   
 State: \*  Province:   
 Country:  Zip:

**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	Cage Code	ASAP Id	Active
<a href="#">Select</a>	2002469	Institute for Community Managed Resources (ICMR)	NOAA	123 Main Street, Tamuning, GU 20000 GUM	123456789	987654321			true
<a href="#">Select</a>	1000059	St Martin Parish Police Jury	NOAA	P.O. Box 9, St. Martinville, LA 70582 USA	123456789	726001273			true



- 1. 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).**
- 2. Only active records are 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.**
- 3. 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. If an organization record is non-ASAP, but that Organization has been ASAP in the past, please contact the Grants Online Help Desk.**



**GRANTS ONLINE**

## Add Organization

**Add Organization**

\*\*\*\*\*PROVISIONAL ORGANIZATION\*\*\*\*\*

**Description**

Organization Type \*

Bureau \*

Applicant Type

Organization Name \*

**Identification**

Duns Number (9 digit number)  +4

EIN Number (xx-xxxxxxx)

MSI Code  [Search MSI List](#)

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

**SAM Physical Address**

Street Address \*

City \*

County

State \*  Zip \*

Country \*

Phone \*

**SAM Mailing Address**

SAM Mailing Name

Street Address

City

State

Country

Note: Leaving the City blank will copy the Physical address on Save >> Exit.

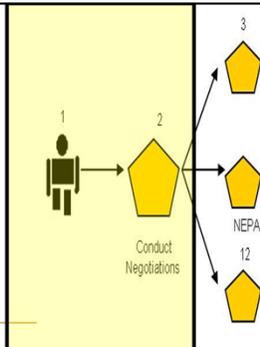
Zip

When adding a new organization the user must select his/her 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 the user can indicate if s/he has verified the EIN and DUNS number the recipient entered on the submitted paper application. On occasion, there have been typos in the EIN or DUNS number on the application. Those typos frequently lead to inaccuracies in the organization's profile information and contribute 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" process step (Universal RFA) or "Assign Award Number/Recipient" process step (Competitive RFA).



**GRANTS ONLINE**



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
<a href="#">View</a>	Conduct Negotiations	N/A	02/05/2011	Application	LB Universal2 RFA App	Not Started	2199761	1795527			icmr	LB Univ2 App
<a href="#">View</a>	Notif Recipients	N/A	02/05/2011	RFA	N/A	In	2100760	1705525	02/05/2011		N/A	N/A

Project Type:  Construction  Non-Construction

Principal Investigators-  
Project Directors:

Keyword(s):

Principal Place Of Performance :  [Search FIPS Data](#) [Guidance](#)

**Authorized Representative**

Prefix:  First Name:  Middle Name:  Last Name:  Suffix:

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](#)

**Award Number:**

[Generate New Award Number](#) | [Associate with Existing Award](#)

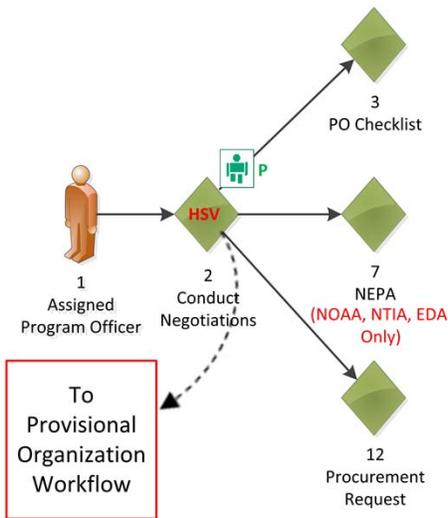
[Save](#) | [Save and Return to Main](#) | [Cancel](#)

**Step 2: Select Construction or Non-Construction**

**Step 3: Authorized Representative Lookup – Find Auth Rep in database**

**Step 4: Generate New Award Number or Associate with Existing Award**

We are currently working on a new award. However, when working on continuation amendments it is imperative that the user select the exact organization record that is on the original award. Presently, the system does not check to ensure the award numbers are the same. If a different organization record is selected, it will cause problems with the application processing further along in the workflow.



Award File In Progress - NA12GOT9990022

Id: 2245442  
 Status:   
 Actions:    
 Your Comments:

[Print Award File History](#)

Attachments:

Pending Actions

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	06/02/2012		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 Received Date	Document Type	Project Title	Task Status	Document Id	Task Id	Start Date	Completed Date	Applicant Name	Propose Number
<a href="#">View</a>	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 for App 1
<a href="#">View</a>	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 for App 1
<a href="#">View</a>	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 for App 1
<a href="#">View</a>	Assign Award Number/Recipient	N/A	01/04/2011	Application	Test App for 4.05 Process Maps	In Progress	2199526	1794572	01/25/2011		Institute for Community	LB-Test for App 1

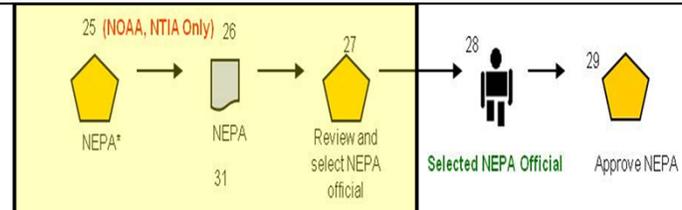
(NEPA - NOAA, NTIA, EDA Only)



- 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 FPO’s 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.
- The user will have either two (2) or three (3) new tasks in his/her Inbox. (If there are no new tasks in the Inbox, click the Inbox tab to refresh the screen display.) Only NOAA, NTIA, and EDA receive the NEPA Document. The other bureaus only receive the PO Checklist and the Procurement Request.
- An Award File has also been created in the database. These tasks will move along separate workflow paths but will become a part of the same Award File in the Grants Specialist’s Inbox. The tasks do not have to be completed in any particular order. However, the Grants Specialist may return an “incomplete” Award File to the FPO. The Grants Specialist cannot proceed to the next step until all documents that comprise the Award File are complete. The user should periodically check the Workflow History to ensure the Procurement Request (and if appropriate the NEPA) have completed their approval process before forwarding the Award File to the Grants Specialist. (The task with the option to forward the Award File to the Grants Specialist appears after the user completes the PO Checklist.)



**GRANTS ONLINE**



**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: Select A NEPA Official

**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 funding).
<input type="checkbox"/> 6.03b.2	Examples of Restoration Actions Eligible for a CE

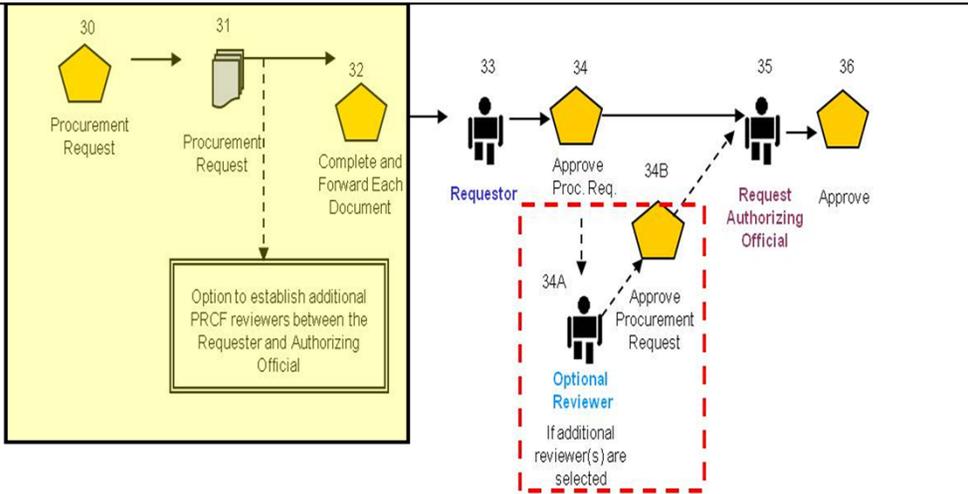


### ***NOAA, NTIA, and EDA ONLY***

- From the Action Dropdown menu, select “Complete NEPA Document” and click the Submit button. The NEPA Details screen displays three questions the user must complete. After completing those three questions add any appropriate attachments and select the NEPA Official who will be perform 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 menu and click the Submit button. The user will be returned to his/her Inbox where s/he will see the NEPA Document task is no longer visible. It has moved to the next step in the workflow. (You can always find old tasks by changing your Inbox filter from “Open” to “Closed.”)

**NOTE:** For additional information regarding the NEPA process, please see item #18 on the FPO Training page.





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 ACCS is valid**

Validated: true

Bureau (xx): \* 14

Fund (xx): \* 2000

Fiscal Year (yyyy): \* 2013

Project Task: SAE0001-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 ACCS Lines](#)   [DWValidate](#)   [Cancel/Done](#)

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWValidated
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

1

2

3

**Accounting - ACCS 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	DBR3BSG-P00	41-12-00-00	\$125,000.00	Yes	Edit Delete

[Add New ACCS Line](#)

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

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

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 menu. 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 (During class each student should use his/her own training ID (e.g., gstudent01). Select Save.
- Now the “Requisition Number” and “Ship To” boxes have been populated by the system. Notice the data in the “Description” box. If the Procurement Request is completed before the PO Checklist, the Grant Type (Grant or Cooperative Agreement) is not available to be filled in. If necessary, this field can be manually updated.

#### FY 2015 UPDATE

- The Department of Treasury’s Bureau of Fiscal Services mandated changes that impact how some NOAA awards are processed by Automated Standard Application for Payments (ASAP). Prior to FY 2015, all NOAA Awards were processed as *Regular Accounts*. Going forward (starting with FY 2015) new NOAA awards, except Cooperative Initiative (CI) awards, will be processed as *Control Detail Accounts*.
- For a detailed discussion of the conventions and rules associated with *Control Detail Accounts*, please refer to the Training Manual reference: [http://www.corporateservices.noaa.gov/grantsonline/Documents/ASAP\\_FPO2015Feb.pdf](http://www.corporateservices.noaa.gov/grantsonline/Documents/ASAP_FPO2015Feb.pdf)
- The essential data entry requirements for the two award types, and the corresponding ACCS Lines, will be discussed at a high level.



### ***Regular Accounts***

- When a recipient logs into ASAP to draw down funds from a Regular Account award, s/he requests an amount that will be deducted from the total balance of the award's authorized funds. When entering the ACCS Lines for this type of award, standard procedures will apply.

### ***Control Detail Accounts***

- Each Control Detail Account award has an authorized total award funding amount. The total award funding amount is divided into to smaller sub-units, each of which is associated with a Unique Account ID. When requesting payments from the award account, the recipient must specify one or more Unique Account IDs and the draw down amount for each Unique Account ID. When entering the ACCS Lines for a Control Detail account, additional requirements apply.
- To facilitate the use of Unique Account Descriptors, a new Grants Online role has been created – the Lead Budget Officer. The person in this role is responsible for maintaining all *Unique Account Descriptor codes* in the Grants Online system for a particular Line Office.

### ***ACCS Lines (Regular Accounts)***

- The user must supply data for the ACCS Lines. To complete this task, select the “Add New ACCS Lines” link. The “Fiscal Year” defaults to the current fiscal year but can be changed by any user who has the right to edit the contents of this screen. The “Prior Year Fund” indicator is automatically set by the system based on the data in the “Fiscal Year” field.



### **ACCS Lines (Control Detail Accounts)**

- To supply data for Control Detail Accounts ACCS Lines, click the “Add New ACCS Lines” link. As for the Regular Accounts, the “Fiscal Year” defaults to the current fiscal year but can be changed by any user who has the right to edit the contents of this screen. The “Prior Year Fund” indicator is automatically set by the system based on the data in the “Fiscal Year” field.
- In addition to the usual information, a Unique Account Descriptor and a Fund Type must be entered.
  - When data for Project, Task, Organization, Object Class, and Amount is entered; Fund Type is populated based upon the Project and Task.
  - Click the Save button.
  - The new ACCS Line displays at the bottom of the screen.

**NOTE:** The Data Warehouse (DW) Validation is an optional step for the Federal Program Officer or Program Office staff user. That step is not a prerequisite to add the Account Descriptor. However, DWValidate must be completed before the Budget Officer can approve the Procurement Request.

- Click the Select Descriptor link to specify the Unique Account Descriptor.
- Based upon the line office, a list of the available Unique Account Descriptor is visible.
- To filter by a Program Office, select the appropriate Program Office from the dropdown list and click the Apply Filter button.
- Click the Select link next to the Unique Account Descriptor to complete the ACCS Line information that should be added to the Procurement Request.



- After entering the ACCS information.
  - Click the Save button.
  - Click the DWValidate button to validate the data against the CBS Data Warehouse tables. If the validation is successful, the Program Code is populated.
  - When the user enters a valid ACCS Line, the words **“The ACCS is Valid”** displays at the top of the Accounting – ACCS Line section of the screen. In addition, the word **“True”** displays next to the Validated field.
  - Click the Cancel/Done button to return to the previous screen.
  - Continue to process and forward the Procurement Request as usual.

- A validated ACCS Line for a Regular Account:

The ACCS is valid

Validated: true

Bureau (xx): 14

Fund (xx): 7

Fiscal Year (yyyy): 2014

Project Task: 4RM2APA - P00

Program Code: 04 - 04 - 01 - 005

Organization: 20 - 01 - 0000 - 00 - 00 - 00 - 00

Object Class: 41 - 11 - 00 - 00

Amount: \$1,250.00

Prior Year Fund: No

Save DWValidate Cancel/Done

Add New ACCS Line

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWValidated
14	7	2014	20-01-0000-00-00-00	04-04-01-005	4RM2APA-P00	41-11-00-00	\$1,250.00	N	Yes

- A validated ACCS Line for a Control Detail Account (includes Unique Account Descriptor):

The ACCS is valid

Validated: true

Bureau (xx): 14

Fund (xx): 1

Fiscal Year (yyyy): 2015

Project Task: 28LEF29 - P00

Program Code: 02 - 21 - 16 - 001

Organization: 30 - 31 - 0002 - 00 - 00 - 00 - 00

Object Class: 41 - 11 - 00 - 00

Unique Account Descriptor: NEW\_DESCRIPTOR Select Descriptor Fund Type: X

Amount: \$250.00

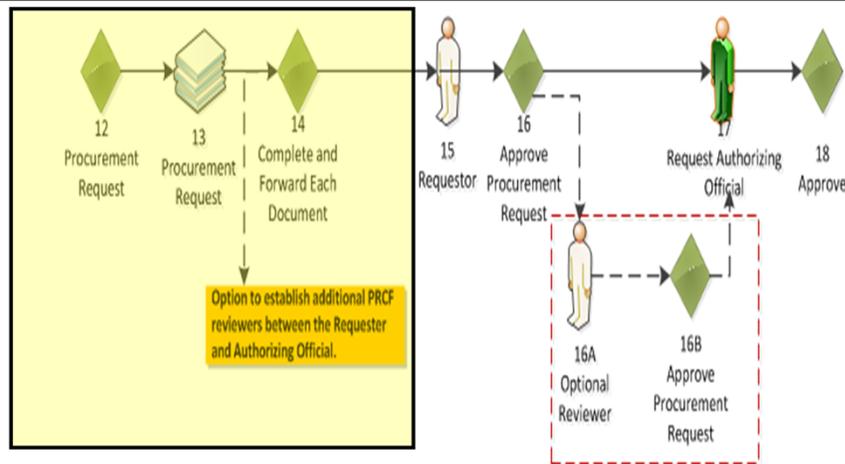
Prior Year Fund: No

Save DWValidate Cancel/Done

Add New ACCS Line

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWValidated	Unique Account Code
14	1	2015	30-31-0002-00-00-00	02-21-16-001	28LEF29-P00	41-11-00-00	\$250.00	N	Yes	NEW_DESCRIPTOR-X-999-001



**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-SAE0000-10-01-0005-00-00-0041-11-00-00;

Cancel

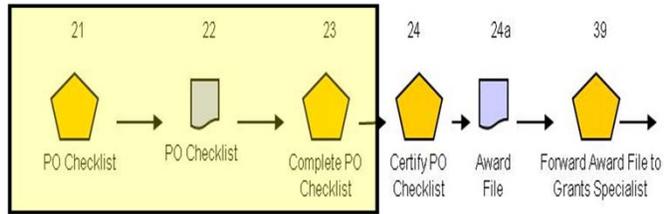
If there is a problem with the edit check against CBS the system will display a separate page showing a message from the CBS system. If the CBS Result message is difficult to understand, contact the Grants Online Help Desk for assistance. In this example one component of the org code is incorrect.



- The CBS Validator feature applies only to Interfaced Awards. Currently, NOAA is the only Bureau with Interfaced Awards.
- There is a CBSValidate button on the main Procurement Request screen. After entering the ACCS line(s), this button can be used to check for sufficient funds. The CBSValidate process also validates each component of the ACCS line and ensures the organization has been linked to a valid vendor in CBS. The results of the CBS validation process are displayed at the top of the Procurement Request screen. If any edits checks are not passed, a CBS error message indicates the cause of the validation failure.

**NOTE:** CBS validation is only required for the Budget Officer. The functionality, however, is also available to the FPO and Requestor.

- The amount of the “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 the user needs to create more than one Procurement Request to send through different approval routes, s/he can select “Create New Procurement Request.” Remember, if there is more than one Procurement Request for an Award, the total funding for all requests must be equal to or less than the Total Federal Funds.
- Select “Save and Return to Main” to prepare to start the workflow. The user is returned to the Procurement Request launch page.
- From the Action dropdown menu select “Forward Procurement Request to Requestor” to begin workflow. Since the user has selected himself/herself as the requestor s/he will have a new task in his/her Inbox to “Review the Procurement Request.”
- Navigate to the Inbox, click the Tasks link and select that task. Select “Approve Procurement Request” from the dropdown menu.



**PO Checklist - NA14GOT9990103**

**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: [SKILLIGALEE INC](#) State: MD  
 Applicant's EIN and DUNS numbers have been verified:

**Grant Type \*** [Guidance](#)

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

**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](#)

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

**Project Description/Abstract \*** [Guidance](#)

[Spell Check](#)

**IMPORTANT: PLEASE REVIEW CAREFULLY** for spelling or punctuation errors (as can occur with copy/paste from Word).

**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	<a href="#">Edit</a> <a href="#">Del</a>

[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



The user now has one more task in his/her Inbox to complete for this application: “Complete PO Checklist.” Click on that task and go to the details page. Fill out this form carefully. Each section is important.

- **Statutory Authority** – Data must be entered. The information can be modified by GMD; however, NOAA policy specifies that the FPO should enter complete and accurate information.
- **Project Description/Abstract** – Do not use abbreviations. This is the information that is used for congressional notifications and for press releases.
- The user should verify the accuracy of the EIN and DUNS; indicate verification by marking the checkbox on the General Award Information section of the screen. Verifying those two variables will diminish the possibility of errors that delay receiving applications and processing the award.
- **Matching Requirements** –
  - a. If using a 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 the Federal share). Using real numbers, for a \$500,000 total award there is \$100,000 in matching funds to \$400,000 in Federal funds.
  - b. If using percentages, the percentage is based on the total award (Federal plus match), not a percentage of just the Federal funds. (Ex. A 20% match means that the total award contains 80% Federal funds and 20% matching funds). Using real numbers, for a \$500,000 total award there is \$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 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 award conditions not covered elsewhere on the page.



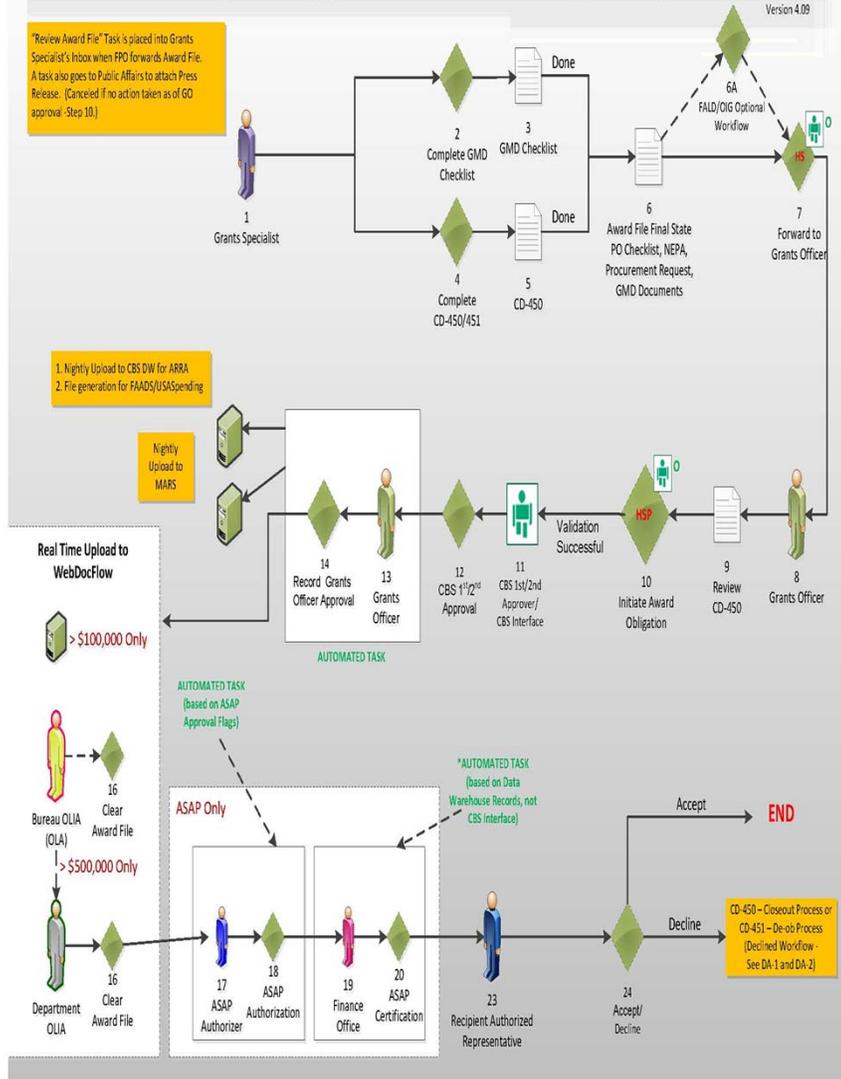
# Grants Management Division Process

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

June 11, 2012

Version 4.08

\*Review Award File\* Task is placed into Grants Specialist's Inbox when FPD 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.)





- When the Award File has been forwarded to the Grants Management Division (GMD) there are several additional steps that take place before the award offer is sent to the recipient. GMD has 60 days to complete its 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 indicated as ASAP, the ASAP steps on this workflow will be skipped. Subsequently, the recipient must 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 irrespective of the award amount.

## Federal Program Officer Training Agenda

### Day 2 - All Day

<b>Session 3: Competitive RFA Creation / Application Processing 8:00 am – 4:30 pm</b>	
<b>Topic</b>	<b>Duration</b>
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



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

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**May 2015**

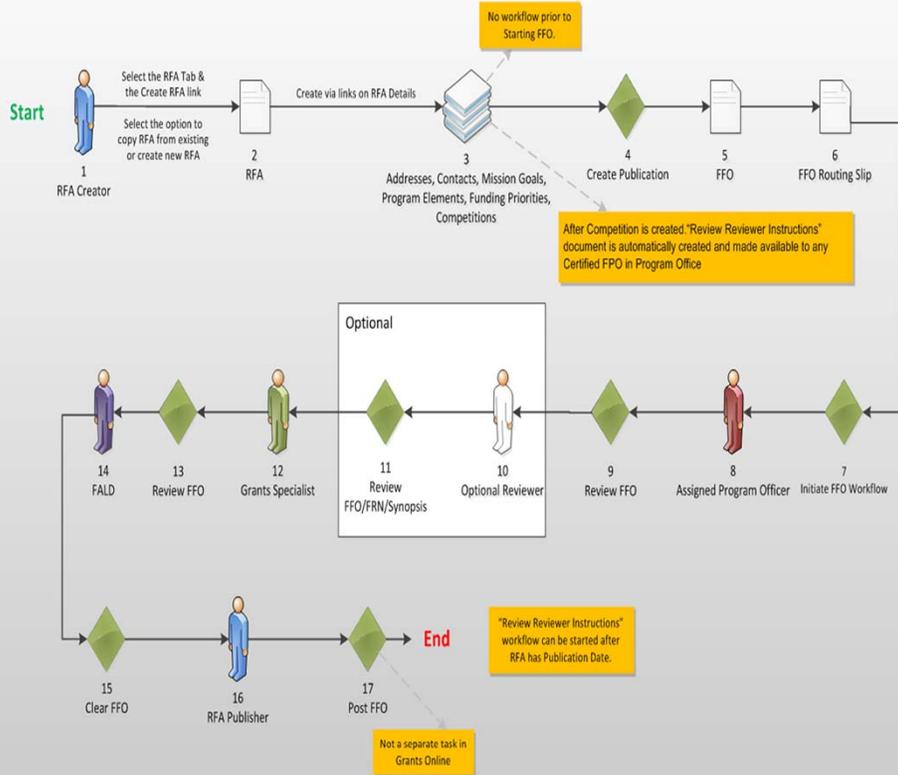


# Competitive Process – RFA Creation

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

5/8/2015

Version 4.15





## **Universal and Competitive RFA Fields Posted to Grants.gov**

- Opportunity Number – ***Federal Opportunity Number***
- Opportunity Title – ***RFA Name***
- Opportunity Category – (***Competitive RFA → “Discretionary”; Universal RFA → “Other”***)
- 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 the 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***

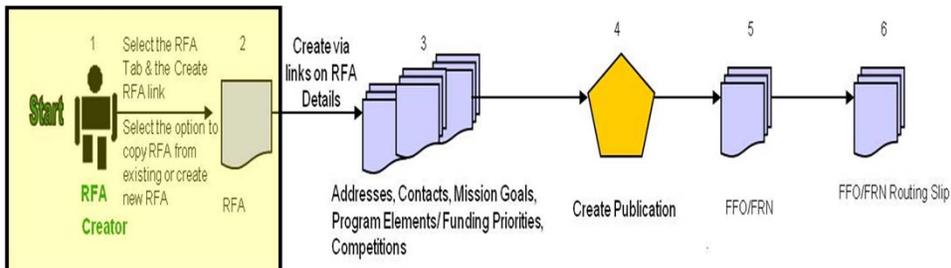
### **Notes:**

1. The assigned Program Officer for the RFA must be a “Certified FPO” to advance documents to the next step in the workflow process.
2. For both Universal and Competitive RFAs the user should know the person(s) in his/her Program Office who will receive the application(s) for the 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 (Max)*
- Award Floor – *Anticipated Award Amount (Min)*
- 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 Name\*

Fiscal Year\* (YYYY)

Announcement Type Initial

Anticipated Publication Date\* (MM/DD/YYYY)  **\*\* Competitive Only**

Line Office\*

Assigned Program Office\*

Assigned Program Officer\*

CFDA Number\*

Sub Program

**Save Cancel**

### RFA Header Information

Document ID 2147932

RFA Name\*

Fiscal Year\* (YYYY)

Announcement Type Initial

Anticipated Publication Date\* (MM/DD/YYYY)  **\*\* Competitive Only**

Funding Opportunity Number

Line Office\* NOAA Grants Online Training (GOT)

Assigned Program Office\*

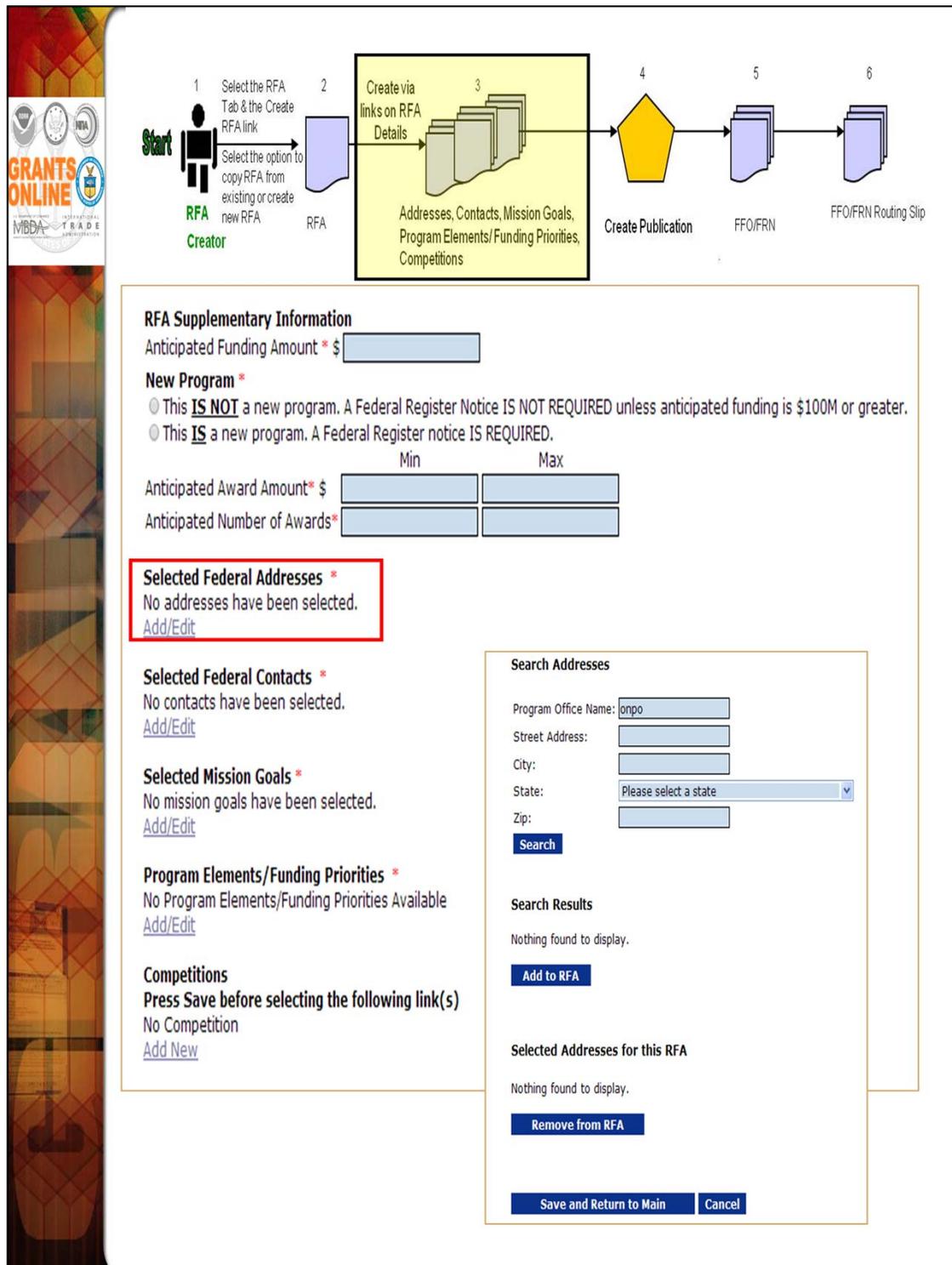
Assigned Program Officer\*

CFDA Number\*

Sub Program



- All RFA workflow processes fall into two main categories – “Competitive” and “Universal.”
- All 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 the user’s training id (e.g., Grants Studentxx). This will make it easier to locate the RFA in future searches. The user may also want to include the current date as a part of the RFA name. For this class, set Anticipated Publication Date to tomorrow’s date.
- Select One Commerce Program Office (OCPO) and the training instructor as the Assigned Program Officer. Select the only available CFDA Number. Click Save.
- **NOTE: The Funding Opportunity Number (FON) has now been generated. The FON is comprised of the following components:**
  - First component – Bureau (for training – “NOAA”)
  - Second component – Line Office (for training – “GOT”)
    - NOTE:** For organizations where the Bureau and Line Office are the same, the Line Office is not included
  - Third component – Program Office (for training – “OCPO”)
  - Fourth component – Next 4 characters reference the Fiscal Year
  - Fifth component – The last 7 characters are a system-generated number



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

The image illustrates the process of creating an RFA (Request for Applications) and adding program elements. It includes a flowchart, a form for adding program elements, and a table of existing program elements.

**Flowchart:**

- 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

**Add Program Element/Funding Priority Form:**

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](#)

Label:  e.g. 1, A, 1., 1.a.  
Name: \*   
Note: Reports and screen listings will use the label if entered. Otherwise, the name will be used.  
Description:  
  
45 / 4000 [Spell Check](#)  
[Save](#) [Cancel](#)

**Program Element/Funding Priorities Table:**

Order	Label	Name	Description	Edit	Delete
1	A	First Program Element/Funding Priority	Description of Program Eleme	<a href="#">Edit</a>	<a href="#">Delete</a>
2	B	Second Program Element/Funding Priority	Description of Program Eleme	<a href="#">Edit</a>	<a href="#">Delete</a>

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

Program Elements can be assigned 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.

Prior to adding details for the Competition, be certain to save the data entered thus far for the RFA.

```

graph LR
    Start((Start)) --> Step1[1. Select the RFA Tab & the Create RFA link  
2. Select the option to copy RFA from existing or create new RFA]
    Step1 --> RFA[RFA]
    RFA --> Step3[3. Create via links on RFA Details  
Addresses, Contacts, Mission Goals, Program Elements/ Funding Priorities, Competitions]
    Step3 --> Step4[4. Create Publication]
    Step4 --> Step5[5. FFO/FRN]
    Step5 --> Step6[6. FFO/FRN Routing Slip]
    
```

Competition Name \*  Fiscal Year \*

Competition Type \*  Group  Individual Qualification

Assigned Program Office \*

Competition Manager \*

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

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 completed outside of Grants Online.*

**NOTE:** Please reference the expanded version of the Special Award Conditions data entry screen in the Universal Processing section.



- **By default, the RFA name is the same as the Competition Name. Make changes as appropriate. Enter the Fiscal Year.**

**NOTE:** There can be competitions for more than one fiscal year in a single RFA.

- **In most cases the user will select “Group” for Competition Type (see the distinction between the Competition Types below).**

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

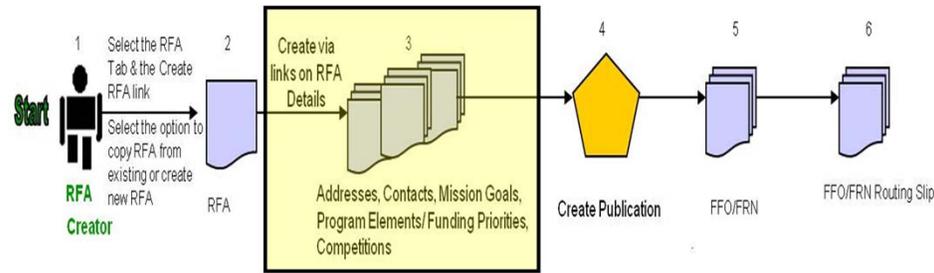
**Individual Qualification – Applications are typically due over the course of a fiscal year and only need to meet or exceed an absolute standard to be funded.**

- **Remember to Save often.**
- **You now have a page to add additional details for this Competition. Follow the step below to enter data into 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 upon the actual publication date. The determining factor is how close the application due date is to the anticipated posting date in Grants.gov.**
- 3. Select “View Anticipated Competition Schedule” to view the system-calculated dates.**

- **NOTE:** The user who receives a routed application becomes the “Assigned Program Officer” for that application and will get the tasks to “Conduct Negotiations” and three Award File tasks: 1) the PO Checklist; 2) Procurement Request; and 3) 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 prior to PO Checklist certification.
- **Click the “Save” button at the bottom of the screen before moving on to the next sections.**





```

graph LR
    Start((Start)) --> Step1[1 Select the RFA Tab & the Create RFA link  
Select the option to copy RFA from existing or create new RFA]
    Step1 --> Step2[2 RFA]
    Step2 --> Step3[3 Create via links on RFA Details  
Addresses, Contacts, Mission Goals, Program Elements/ Funding Priorities, Competitions]
    Step3 --> Step4[4 Create Publication]
    Step4 --> Step5[5 FFO/FRN]
    Step5 --> Step6[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  Mean  Median

Not Scored Criteria:\*  Yes  No

Bonus Points:\*  Yes  No

Anticipated Review Start Date:\*  Anticipated Review End Date:\*

[Add Agency Standard Criteria](#)

#### Points Scoring Criteria

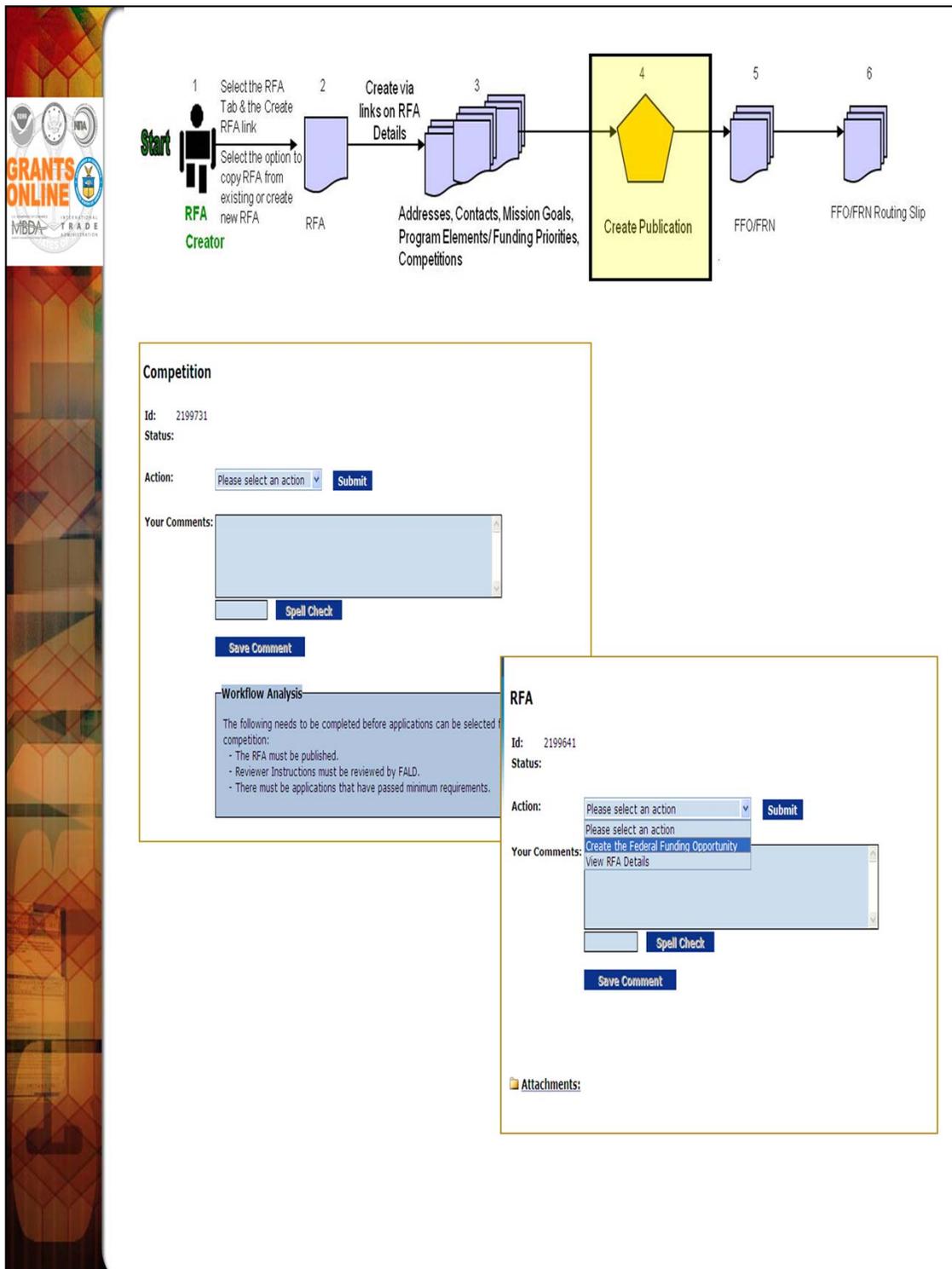
Name	Reviewer Comments	Reviewer Score	Minimum Score	Maximum Score	Action	Action
Technical/Scientific Merit	Required	Required	0.0	40.0	<a href="#">Edit</a>	<a href="#">Delete</a>
Importance/Relevance and Applicability of Proposal to the Program Goals	Required	Required	0.0	20.0	<a href="#">Edit</a>	<a href="#">Delete</a>
Overall Qualification of Applicant	Required	Required	0.0	15.0	<a href="#">Edit</a>	<a href="#">Delete</a>
Project Costs	Required	Required	0.0	15.0	<a href="#">Edit</a>	<a href="#">Delete</a>
Outreach and Education	Required	Required	0.0	10.0	<a href="#">Edit</a>	<a href="#">Delete</a>

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

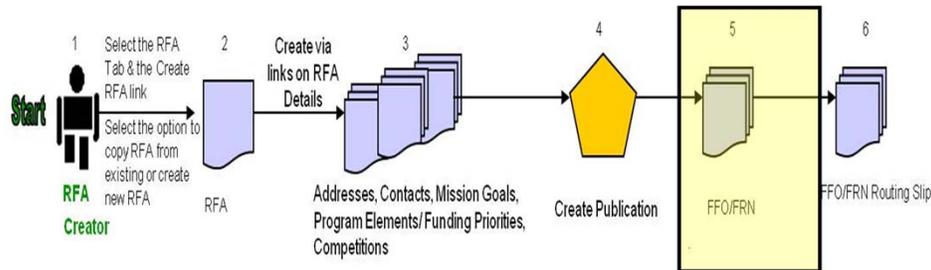
[FFO Evaluation Criteria Report](#) [Application Review Scoring Sheet](#)

At this point, you need to know some basic information regarding the Review Event(s). These details should reflect the information 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 from which you navigated).



From the Review Event Launch page navigate to the Competition to verify the information is complete and accurate. The next step is to navigate to the RFA and begin creating the FFO.



### 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.



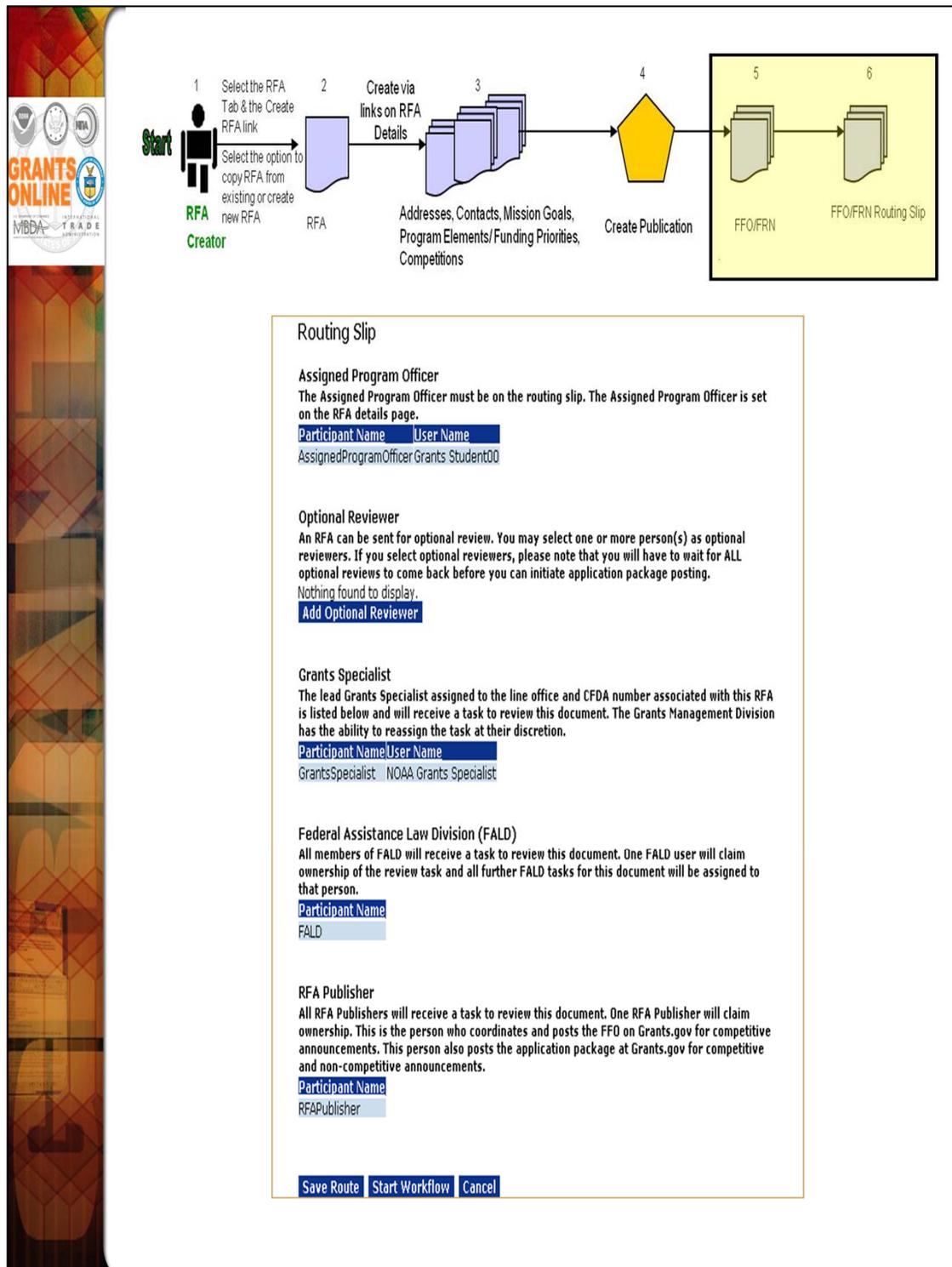
- Data previously entered into other parts of the RFA will not carry over to these fields. This forces the user to format the paragraphs appropriately for publication. Similarly, if the “Create New from Existing” option was used to create the RFA, the publication’s fields are blank. Again this forces the user to format the paragraphs appropriately for publication.
- Formatting (bold, italics, underline, etc.) is currently unavailable at this time for FFOs. This restriction is because of the historical link to a corresponding Federal Register Notice.
- To have both windows open on one screen right click the “Guidance Documents” link and specify it should be opened in a new window. Resize both windows so the FFO screen and guidance screen can be displayed side-by-side. Use the samples from the guidance document to complete information for the FFO. The user must customize the sample for his/her Opportunity notice. Use the “Preceding” and “Subsequent” links to move through the guidance pages.

**NOTE:** When creating a new RFA from an existing RFA, the user can open a second window with a *plain text version* of the old FFO. That facilitates copying and pasting data into the new RFA – one field at a time, making appropriate changes as you go.

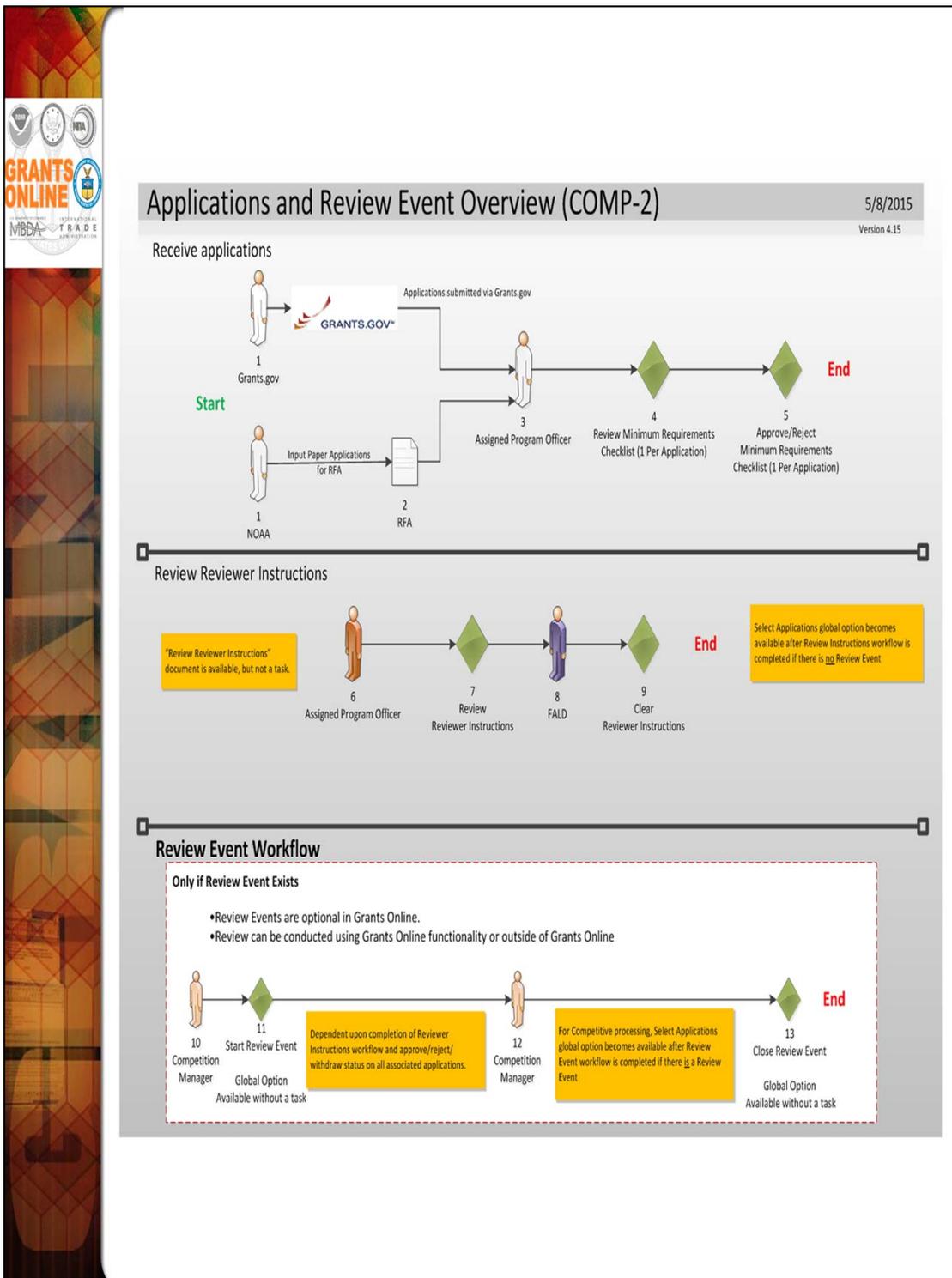
- For the instances where there is a “soft” date based on the publication date of the Federal Register Notice the user should use the phrase <INSERT DATE 45 DAYS AFTER PUBLICATION>. The user also has the option to specify the appropriate number of days based on his/her RFA.
- Do not indent the first paragraph of any section – the system automatically indents the text. Subsequent paragraphs in the FFO for each section should be indented.
- As data is entered into the various sections of the outline the “empty” tag changes to a check mark. This is an indicator that the user has entered data for that section. As needed, the user may return to that section and edit data. If all data is removed from a section, the “empty” tag again displays.

**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."*

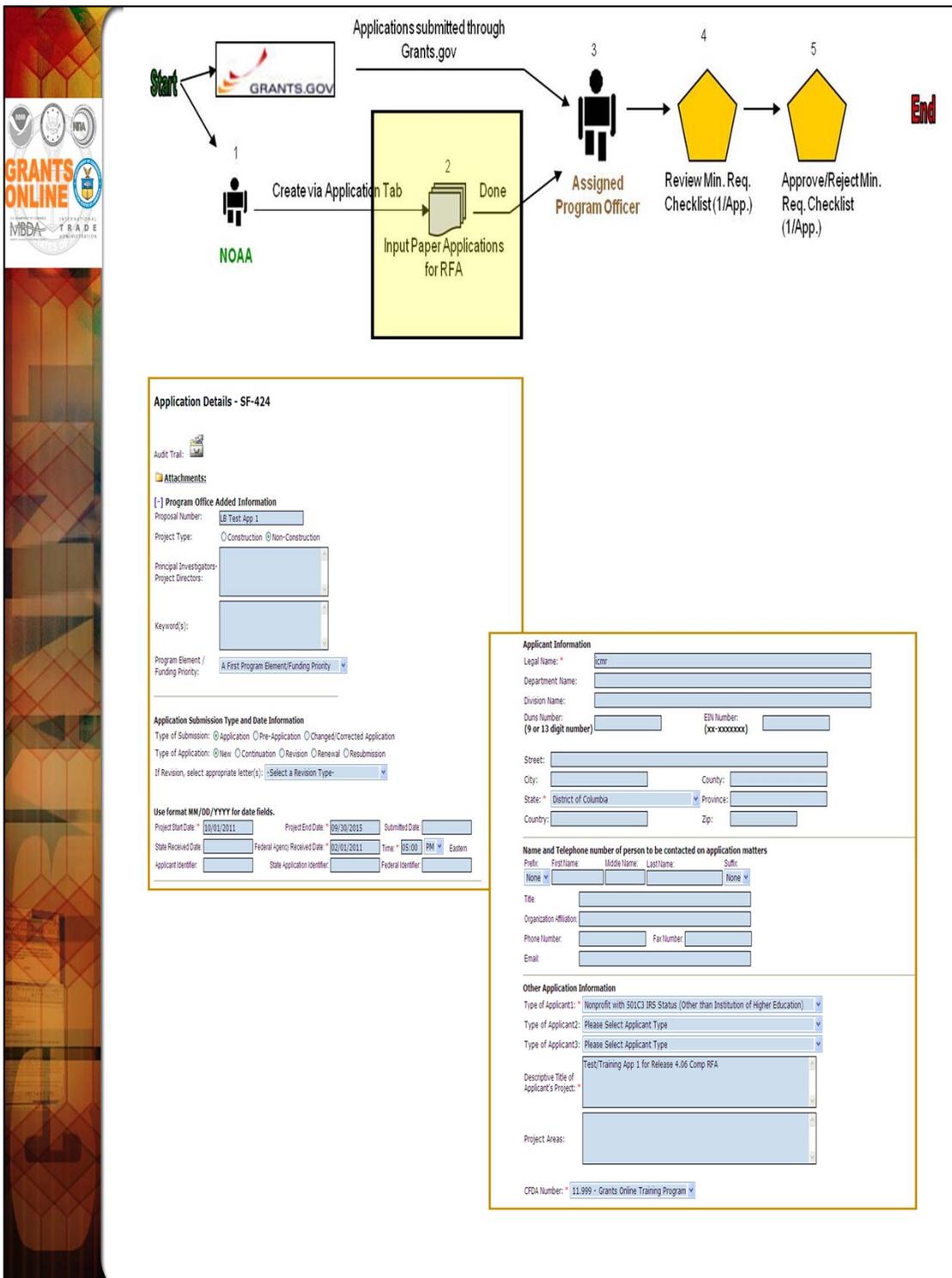


The only customizable portion of the FFO Routing slip is the Optional Reviewer section. The Assigned Program Officer is copied from the RFA details. The Grants Specialist is the current lead Grants Specialist in GMD for the user's Line Office and CFDA Number. When the FFO goes to FALD and to the RFA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



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

**NOTE:** Refer to the Review Event Section at the end of the Training Manual for additional details.



**Application Details - SF-424**

Audit Trail:

**Attachments:**

**[-] Program Office Added Information**

Proposal Number:

Project Type:  Construction  Non-Construction

Principal Investigators-  
Project Directors:

Keyword(s):

Program Element /  
Funding Priority:

**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) EIN Number:  (xx-xxxxxxx)

Street:

City:  County:

State: \*  Province:

Country:  Zip:

**Name and Telephone number of person to be contacted on application matters**

Prefix:  First Name:  Middle Name:  Last Name:  Suffix:

Title:

Organization Affiliation:

Phone Number:  Fax Number:

Email:

**Other Application Information**

Type of Applicant: \*

Type of Applicant:

Type of Applicant:

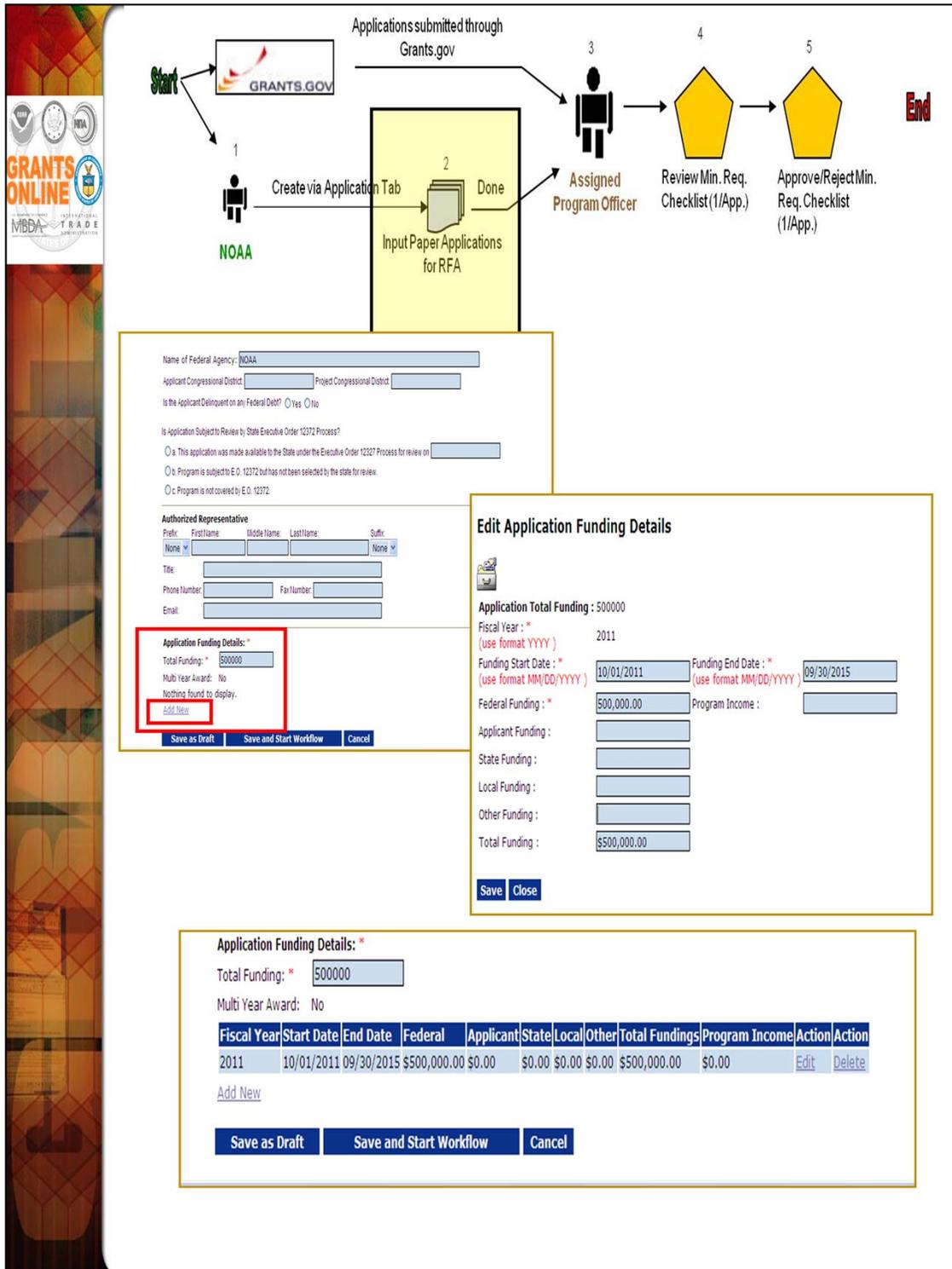
Descriptive Title of Applicant's Project:

Project Areas:

CFDA Number: \*



- To begin, select the “Input Paper Applications” menu option on the Applications tab. The data on the Application Details screen will be populated if the application is imported from Grants.gov. However, if a paper application is received by the Program Office the data must be entered into Grants Online. Only the fields marked with an asterisk are required for the application processing to continue.
- The Application Details screen contains most of the fields included on a SF-424. After entering required fields click “Save as Draft.” If the user does not supply data for all required fields s/he receives an error message with guidance regarding the missing data.
- Be certain to include the student username (GSTUDENTxx) in the Project Title. Adhering to that naming convention will make future identification and/or location of the RFA easier.



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:  First Name:  Middle Name:  Last Name:  Suffix:

Title:

Phone Number:  Fax Number:

Email:

**Application Funding Details: \***

Total Funding: \*

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 Funding End Date : \* 09/30/2015  
(use format MM/DD/YYYY) (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: \***

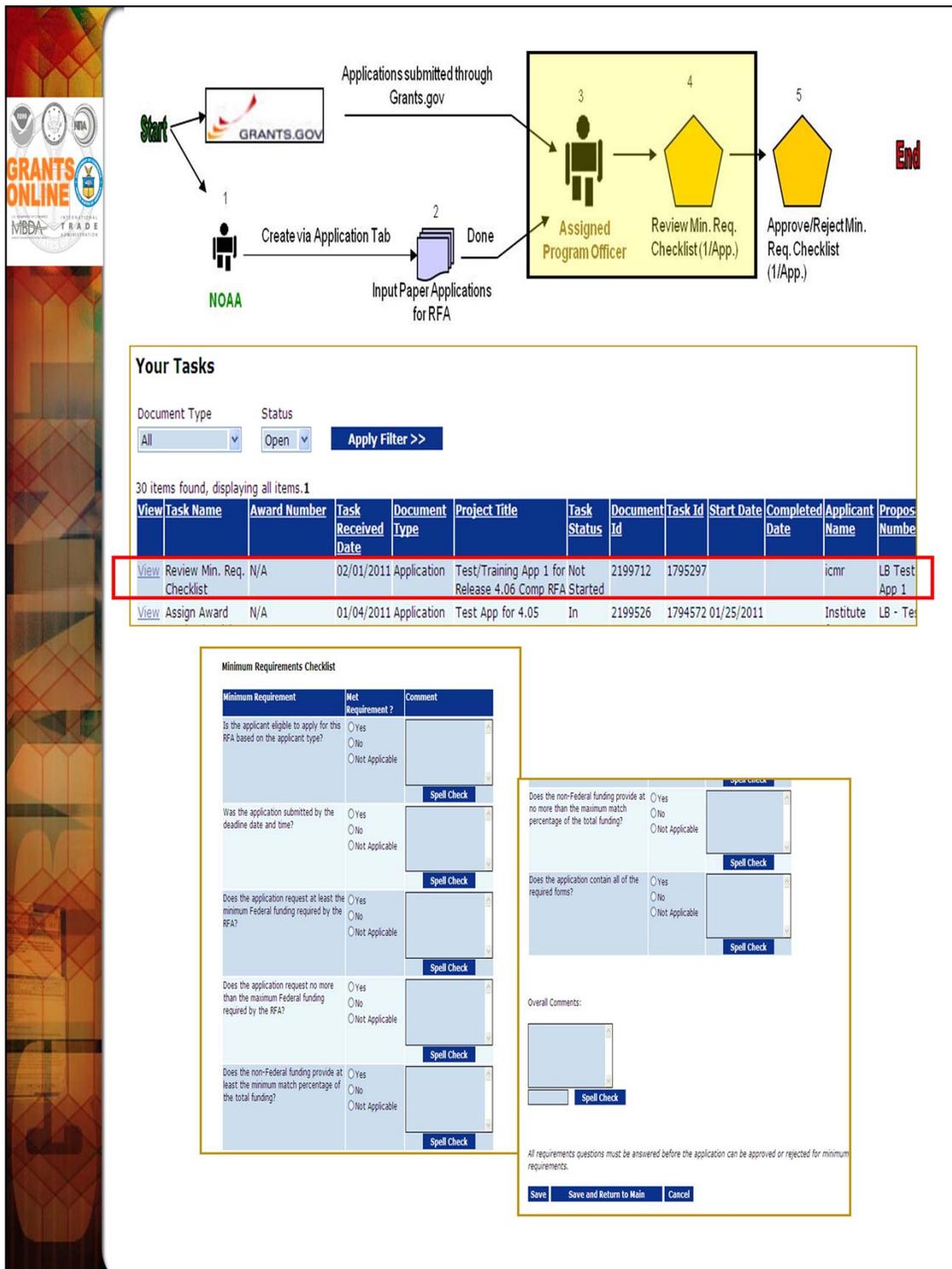
Total Funding: \*

Multi Year Award: No

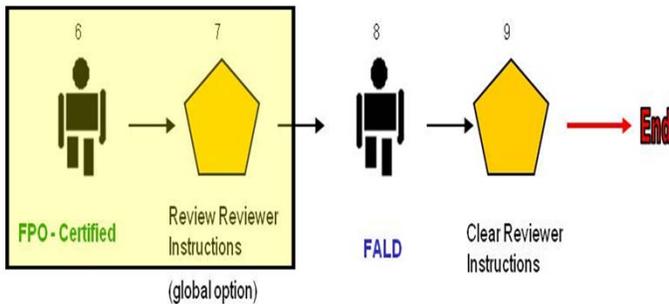
Fiscal Year	Start Date	End Date	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2011	10/01/2011	09/30/2015	\$500,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500,000.00	\$0.00	<a href="#">Edit</a>	<a href="#">Delete</a>

[Add New](#)

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



If the “No” radio button is selected for any item in the Minimum Requirements Checklist, a comment must be entered in the associated comments box or in the Overall Comments box at the bottom. The user will not be able to save the screen’s data content until s/he enters a comment.



### Sub Documents

Type	ID	Title	Status
Applications Report	<a href="#">2199731</a>	Applications Report	
Selected Applications	<a href="#">2199731</a>	Selected Applications	
Reviewer Instructions	<a href="#">2199732</a>	Reviewer Instructions	

Export options: [Excel](#)

#### Reviewer Instructions

##### Attachments:

Name	Short Description	Created Date	Internal Use Only	FALD Reviewed	Logistical	Remove
<a href="#">Test Attachment 1.pdf</a>	Test File 1	02/01/2011 07:24:23 PM	No	No	No	<a href="#">Remove</a>

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
<a href="#">Test Attachment 2.doc</a>	Test File 2 - Logistical	02/01/2011 07:26:58 PM	No	No	Yes	<a href="#">Remove</a>

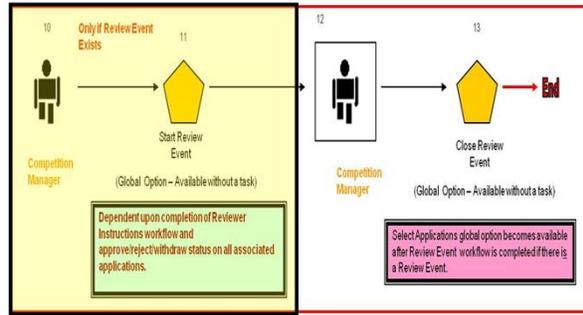
Add new Attachment: [+](#)  
 Any changes to information on this page should be saved before adding or removing attachments.

**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. The Review Event is started by navigating to the Competition launch page and clicking the ID link for Reviewer Instructions (under the sub-documents section).**
- **Two sections comprise 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. The main function of this section is to provide instructions to panel reviewers associated with the logistics of convening a panel to review the proposals.**



### Independent Individual Merit Review

**Id:** 2253410  
**Status:**

**Action:**

**Your Comments:**

**Id:** 2253411  
**Status:** ManageReviewEvent - Not Started

**Action:**

**Your Comments:**

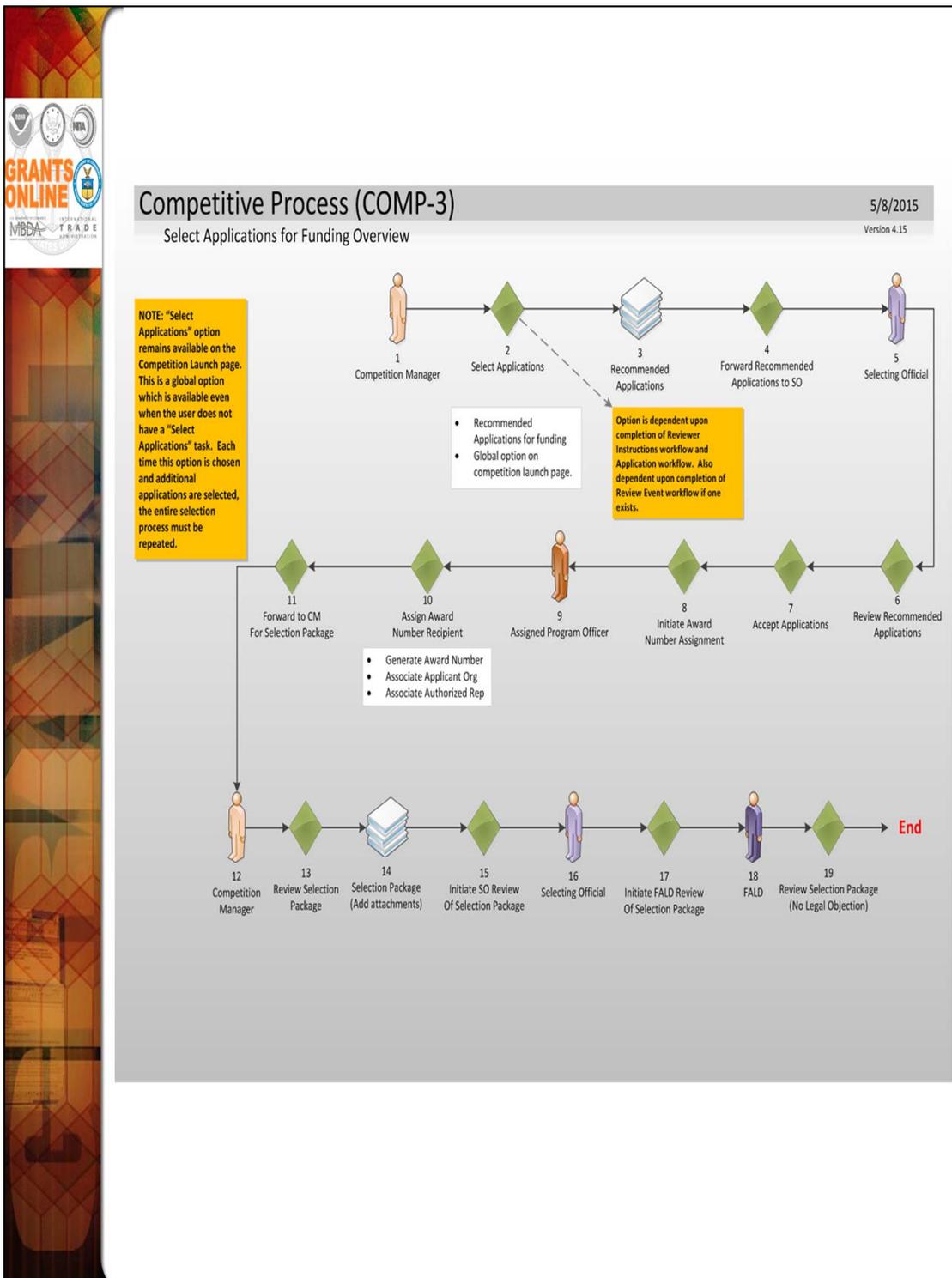


- Initially there is not a Review Event task in the Inbox. Therefore, the Competition Manager should navigate to the Review Event Launch Page (from the sub-documents section of the Competition Launch Page). When the Competition Manager completes that process, the “Start the Review Event” option is now available on the Action dropdown menu. Remember, the option to Start the Review Event 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.

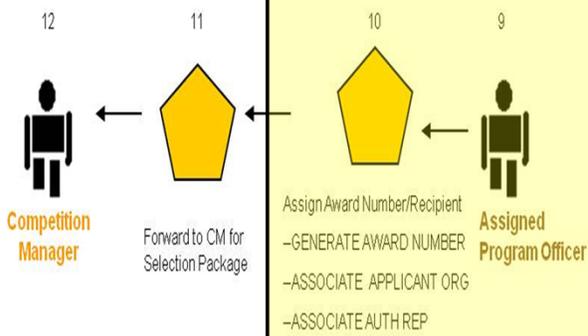
**NOTE :** Refer to the Review Event Section at the end of the Training Material for more details.



***This Page is Intentionally Left Blank***



During the 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 application. This step is functionally the same as the “Conduct Negotiations” step of the Universal Application Processing workflow.



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	Proposal Number
<a href="#">View</a>	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
<a href="#">View</a>	Assign Award Number/Recipient	N/A	01/04/2011	Application	Test App for 4.05 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:   Eastern  
 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.  
 Note: If this is a Continuation or Supplemental, skip this step and click on the "Associate Award Number" button at bottom of page.  
 Department Name:   
 Division Name:   
 Duns Number: \*  EIN Number: \*   
 Street:   
 City:  County:   
 State: \*  Province:   
 Country:  Zip:

**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	Bureau	Address	DUNS	DUNS+ EIN	Cage Code	ASAP	Active
<a href="#">Select</a>	2002469	Institute for Community Managed Resources (ICMR)	NOAA	123 Main Street, Tamuning, GU 96900 GUM	123456789	98765432			true
<a href="#">Select</a>	1000059	St Martin Parish Police Jury	NOAA	P.O. Box 9, St. Martinville, LA 70582 USA	123456789	726001273			true



- The “Assign Award Number/Recipient” task is now with each Assigned Program Officer.
- The initial step is to link the application to a recipient organization record in the Grants Online database.
  - a. 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).
  - b. 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 although 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 is deactivated to prevent it from being 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. However, the active awards will become associated with the ASAP record.
  - c. The user 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 Organization

**Add Organization**

\*\*\*\*\*PROVISIONAL ORGANIZATION\*\*\*\*\*

**Description**

Organization Type \* External Recipient  
Bureau \* National Oceanic and Atmospheric Administration (NOAA)  
Applicant Type Other  
Organization Name \* An Organization that is External to NOAA

**Identification**

Duns Number 087654321 +4  
(9 digit number)  
EIN Number 123456789  
(xx-xxxxxxx)  
MSI Code - not specified - Search MSI List

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

**SAM Physical Address**

Street Address \* 1457 Main Street  
City \* Germantown  
County  
State \* Maryland Zip \* 20874  
Country \* United States  
Phone \* 301-123-9876

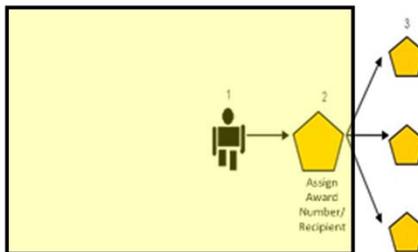
**SAM Mailing Address**

SAM Mailing Name  
Street Address  
City  
State \* Please select a state  
Country \* United States

Note: Leaving the City blank will copy the Physical address on Save >> Exit.  
Zip



- **When adding a new organization the user must select his/her Bureau at the top of the page. The user may enter his/her organization's Cage Code at the bottom of the page (if that information is known or available) .**
- **A required checkbox has been added to the PO Checklist. That requires the user provide confirmation that s/he has verified the EIN and DUNS number the recipient entered on the submitted application. Typos in the EIN or DUNS number on the application have the potential to cause inaccuracies in the organization's profile information. In addition, typos may cause to the grant to be 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.**



View	Completed Date	Task Status	Document Type	Task Name	Start Date	Document Id	Task Id	Award Number	Proposa/ Applicant Name	Approved Federal Funding	Total Federal Funding	Project Tit
View		Not Started	Application	Assign Award Number/Recipient		2433636	3461250	N/A	N/A Chesapeake Research Fellowship Professional Develo...	N/A	\$1,000.00	Chesapeak
View		Not Started	Award File	Review Release of Funds		2412836	3428863	NA11NMF4720274	N/A World Wildlife Fund, Inc	\$500.00	\$300,000.00	TEST RECOR Smart Gear
View		Not Started	Performance Progress Report	Review Progress Report		2404002	3410775	NA10NMF4540293	N/A National Fish and Wildlife Foundation	N/A	\$2,000,000.00	TEST RECOR Fisheries In Fund
View		Not Started	Performance Progress Report	Review Progress Report		2403850	3406949	NA09NMF4570410	N/A University of Maryland, Center for Environmental	N/A	\$422,644.00	TEST RECOR Assessment

**Authorized Representative**

Prefix:  First Name:  Middle Name:  Last Name:  Suffix:

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 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](#)

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

**Award Number:**

[Generate New Award Number](#) ←

[Associate with Existing Award](#)

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

**Step 3:**  
Generate New Award Number or Associate with Existing Award.



- We are currently working on a new award. However, it is imperative that when working on continuation amendments the user select the exact organization record that is on the original award. Currently, the system does not check to ensure the organization records are the same. If a different organization record is selected, the user will have problems with the application processing further along in the workflow.
- When the Award number has been generated, click “Save and Return to Main.” Next, 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. After the Competition Manager reviews the package, it can be prepared for approval by the Selecting Official and FALD.
- Please note that a multiple year award refers to an award that spans across more than one year. A multi-year award would have more than one line of funding; whereas a multiple year award would not necessarily have more than one line of funding.



# Competitive Process (COMP-3)

## Select Applications for Funding Overview

5/8/2015

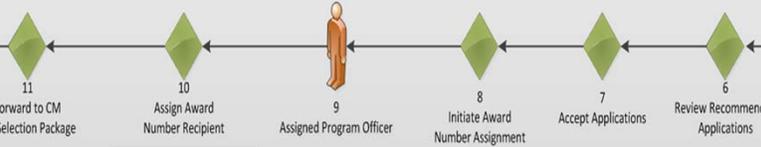
Version 4.15

**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.

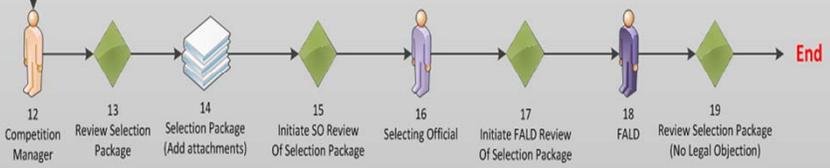


- Recommended Applications for funding
- Global option on competition launch page.

Option is dependent upon completion of Reviewer Instructions workflow and Application workflow. Also dependent upon completion of Review Event workflow if one exists.



- Generate Award Number
- Associate Applicant Org
- Associate Authorized Rep





#### Steps 12-15

- At this point, the Competition Manager attaches all of the pertinent Selection Package documents (e.g., Reviews, Conflict of Interest Forms, Rank Order of Applications, etc.) to the Selection Package. The Selection Package and all its component parts, are sent for final approval.
- If the Selecting Official does not log into Grants Online, a copy of the Approving Document with the signature of the Selecting Official should be scanned and included as an attachment with the Selection Package.

#### Steps 16-17

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

#### Steps 18-19

- If satisfied with the Selection Package, the FALD attorney will initiate the 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 **once** with the action: "FALD Comment." The Selecting Official has an option to follow or not follow the FALD's advice. However, the Selecting Official must send the Selection Package back to FALD. FALD can review the actions taken by the Selecting Official, but after that FALD will only be able to select the "No Legal Objection" workflow option – even if they have a legal objection.

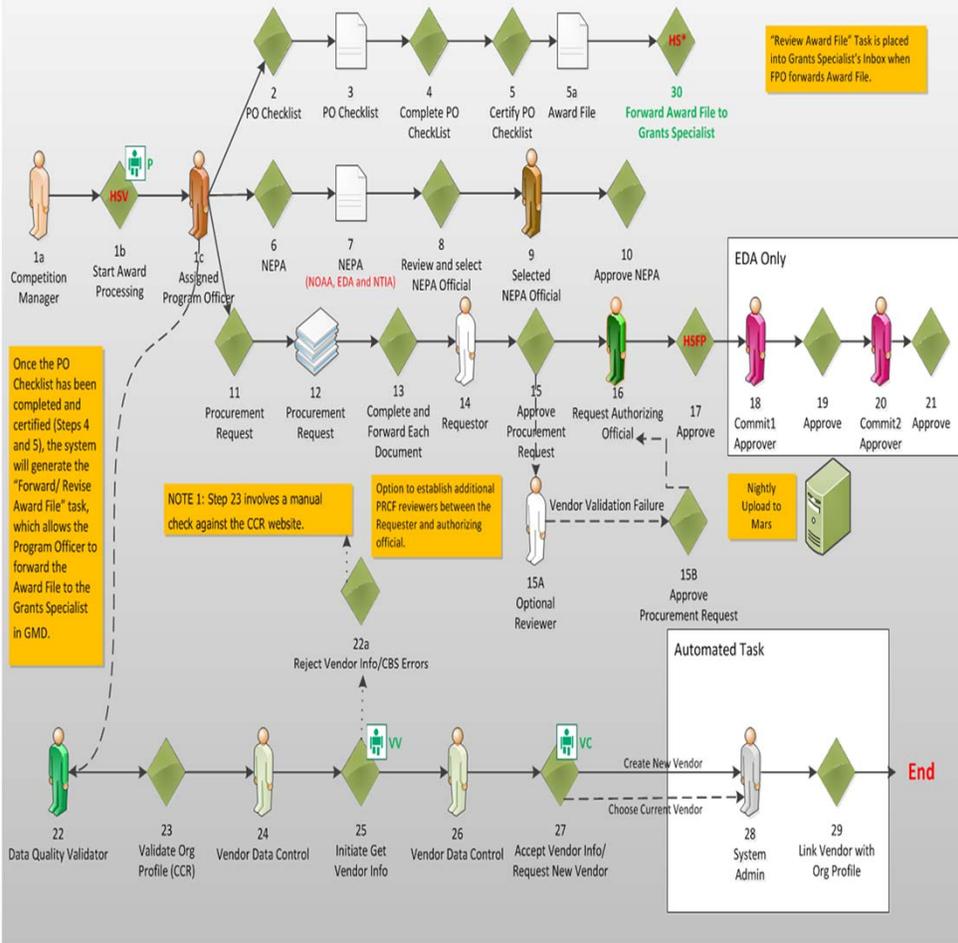


# Start Award Processing Overview (COMP-4)

5/8/2015  
Version 4.15

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

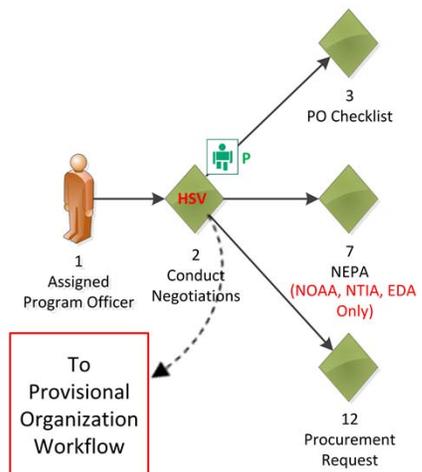
If needed, you can renegotiate the make any changes before forwarding the Award File to GMD (See separate "Renegotiation" Process Map).





#### Steps 1a-1b

- To move forward with application processing, the Competition Manager selects the option to “Start Award Processing” from the “Review Selection Package” task. After an award is checked and 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 are delivered to the Inbox of the Assigned Program Officer (the person who has been working on the application). The Competition Manager can return to this task and start the award processing as needed for each 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:

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	09/22/2012	\$5,000.00	2012	Complete PO Checklist:	Not Started
NEPA	2245446	09/22/2012	\$5,000.00	2012	NEPA Document:	Not Started
Procurement Request and Commitment of Funds	2245445	08/29/2012		2012	Procurement Request and Commitment of Funds:	Not Started
Organization Profile	2245445	09/22/2012	\$5,000.00	2012	Validate Organization Profile:	Not Started
Organization Profile	2245445	09/22/2012	\$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	Proposal Number
View	Procurement Request and Commitment of Funds	NA11GOT9990039	02/02/2011	Procurement	Test/Training App 1 for Not Request and 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 Not 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	N/A	01/04/2011	Application	Test App for 4.05 Process Maps	In Progress	2199526	1794572	01/25/2011		Institute for Community	LB - Test App 1

**(NEPA - NOAA, NTIA, & EDA Only)**



- In the Competitive application process, the Provisional Organization workflow is initiated at the same time as the PO Checklist, the NEPA Document, and the Procurement Request when the FPO selects “Start Award Processing.” However, similar to the Universal Process, the Organization Profile task for the Provisional Organization Workflow is not in the FPO’s inbox. Instead, it is created in the Inbox of the Data Quality Validator (a new Grants Online user role). The FPO can monitor the progress of the Organization Profile by checking “Pending Actions” on the Award File launch page.
- Until the Provisional Organization workflow is completed, the FPO does not have an option to Certify the PO Checklist and the Budget Officer does not have an option to Approve the Procurement Request.
- The user should now have three (3) new tasks in his/her Inbox. If not, the user should refresh his/her Task screen (Do NOT use the browser’s “Back” button to refresh the screen display). An Award File has also been created in the database. These three tasks will move along three separate (but parallel) workflow paths. All three tasks, when completed, will comprise one Award File in the Grants Specialist’s Inbox. The three tasks do not have to be completed in any particular order. However, the user should be aware that the Grants Specialist will return an “incomplete” Award File to the FPO. The Grants Specialist cannot start his/her portion of the workflow process until all three documents are complete in the Award File. The task, with the option to forward the Award File to the Grants Specialist, appears after you complete the PO Checklist. Therefore, the user should periodically check the Workflow History to make certain the Procurement Request and the NEPA Document have also completed their approval process before forwarding the Award File to the Grants Specialist.

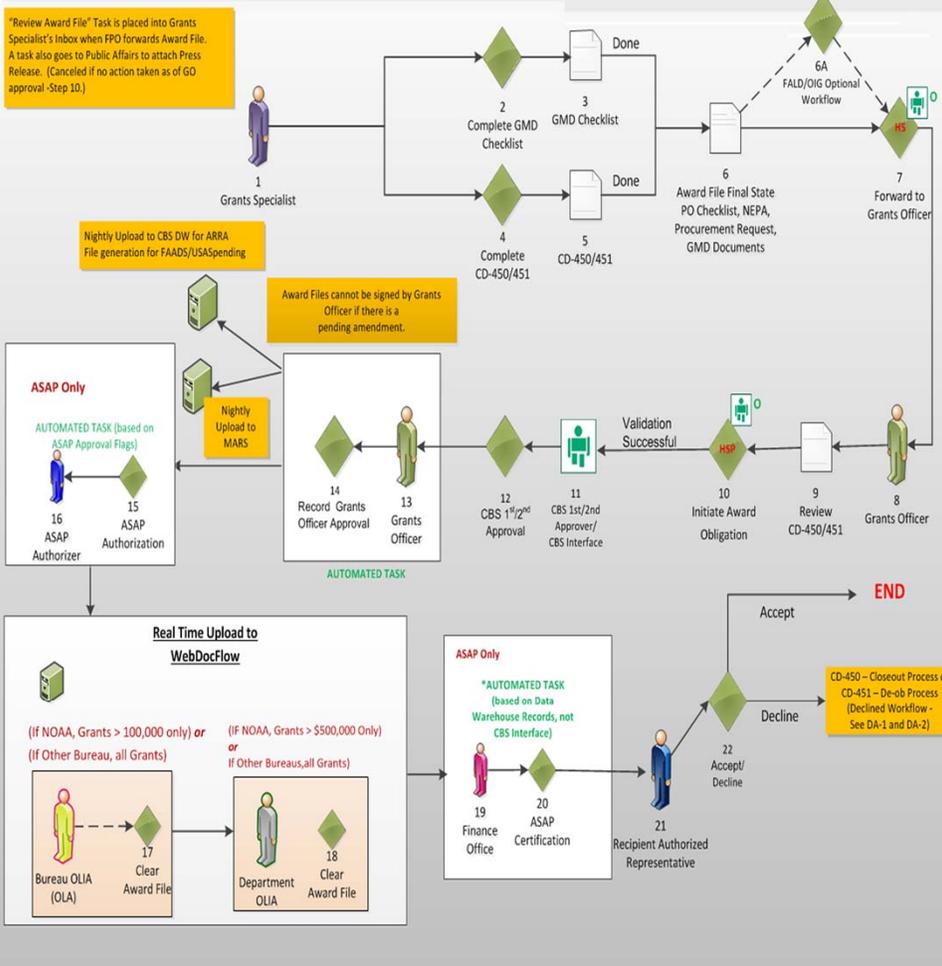
**NOTE:** For detailed steps associated with completing the NEPA Document, the PO Checklist, and the Procurement Request refer to the Universal Processing section.

# Grants Management Division Process



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

October 16, 2014  
Version 4.14





- **When the Award File has been forwarded to the Grants Management Division (GMD) there are several additional steps that take place before the award offer is sent 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 with the exception of the GMD review and approval process.**
- **If funds have been removed from the ASAP account(s) 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 portion of the workflow will be skipped. The recipient will have to use an Organization Profile Change Request to initiate the ASAP enrollment after the award has been accepted. This process must occur when the Non-ASAP record rather than the ASAP record for an organization is accidentally associated with an application.**

**NOTE: For Non-NOAA Bureaus using Grants Online, all awards are routed to WebDocFlow for OLIA clearance irrespective of the award amount.**



## Federal Program Officer Training Agenda

Day 3 - AM

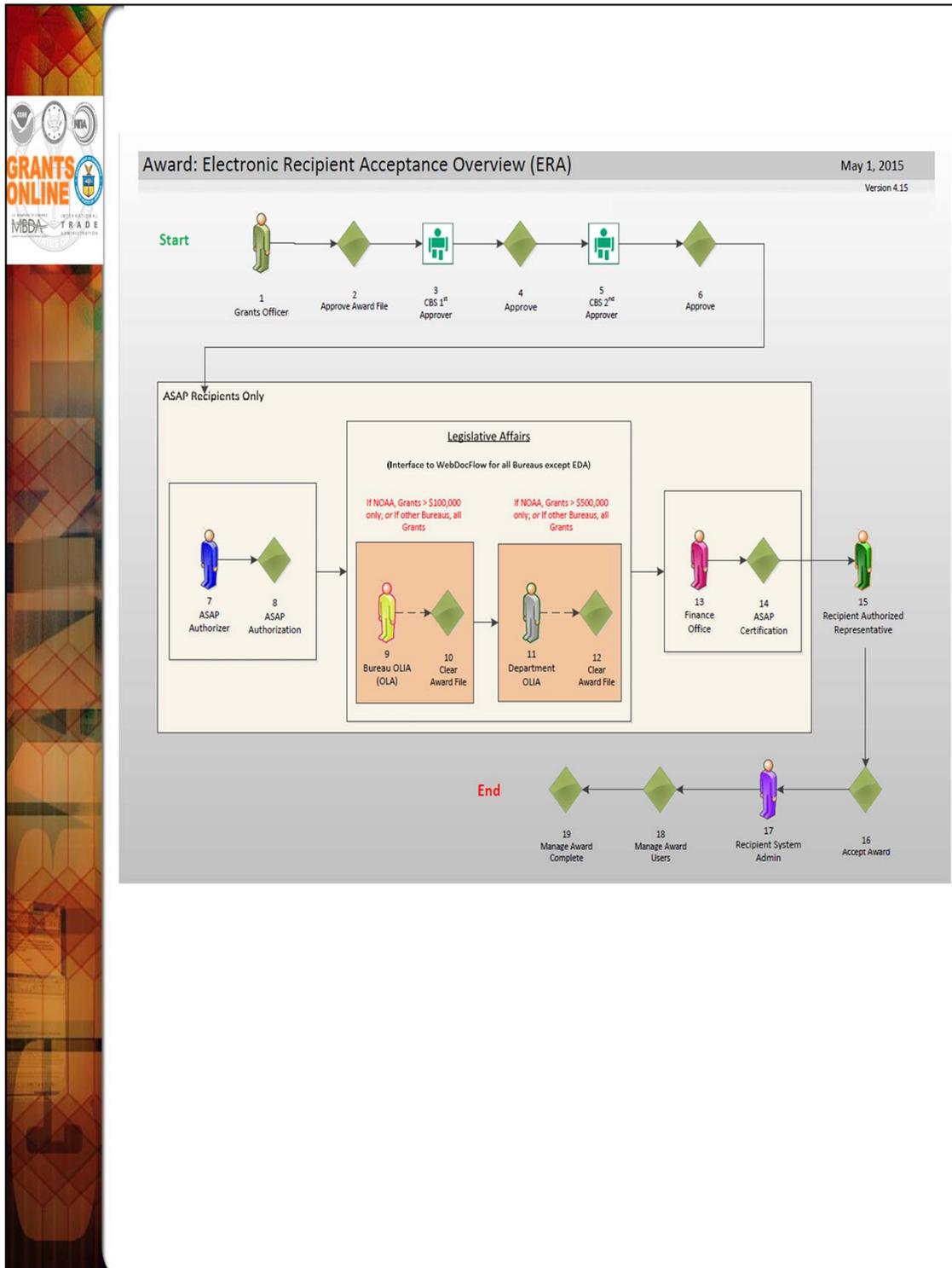
<b>Session 4: Post Award Actions 8:00am – 12:30pm</b>	
<b>Topic</b>	<b>Duration</b>
Introduction and Agenda	8:00 – 8:15 (15 min)
Online Demonstration/Process Maps with Hands-On Participation – Recipient Award Acceptance (EAR)	8:15 – 8:45 (30 min)
Online Demonstration/Process Maps with Hands-On Participation – AAR, PPR, FFR	8:45 – 10:00 (1 hour 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"> <li>- Reduce Funding</li> <li>- De-obligate Declined Amendment</li> <li>- Correct Accounting Classification Code Structure (ACCS) Lines on Approved Award               <ul style="list-style-type: none"> <li>o <b>Reference #19 on the PMO website</b></li> </ul> </li> <li>- Correct Award Dates (Administrative Amendment)               <ul style="list-style-type: none"> <li>o <b>Grants Specialist must initiate action to make the correction</b></li> </ul> </li> <li>- Organization Profile Change Request</li> <li>- Supplementary Information</li> <li>- Correspondence</li> <li>- Federal Reports</li> </ul>	10:00 – 12:15 (2 hours 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



Note: Recipient Training Page link:  
[http://www.corporateservices.noaa.gov/grantsonline/gol\\_training\\_GRANTEE.htm](http://www.corporateservices.noaa.gov/grantsonline/gol_training_GRANTEE.htm)



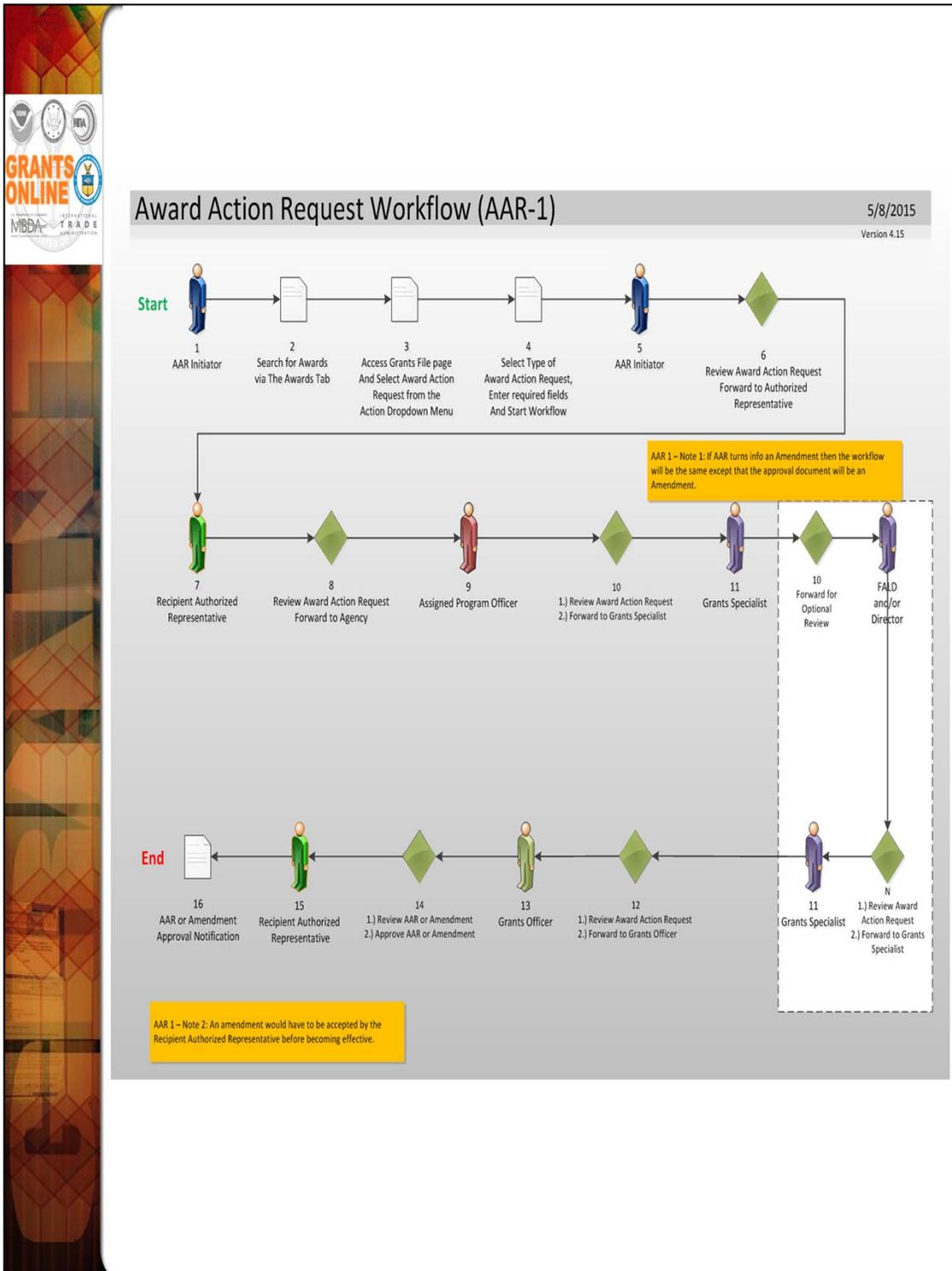
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## Grants Online Process Maps & Screen Shot

### Award Action Request (AAR)

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May 2015





## Award Action Request Index Page

Award Action Requests marked with an asterisk (\*) will always result in an amendment to the award (if approved). Other requests generally result in a notification of approval. However, any request may result in an amendment at the discretion of the Grants Officer. Please refer to the Guidance document for additional information.

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

Reference: Award Action Request Guidance link:  
[http://www.corporateservices.noaa.gov/grantsonline/Documents/AAR\\_Assistance/Recipient\\_AAR\\_Help.htm](http://www.corporateservices.noaa.gov/grantsonline/Documents/AAR_Assistance/Recipient_AAR_Help.htm)



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

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**May 2015**

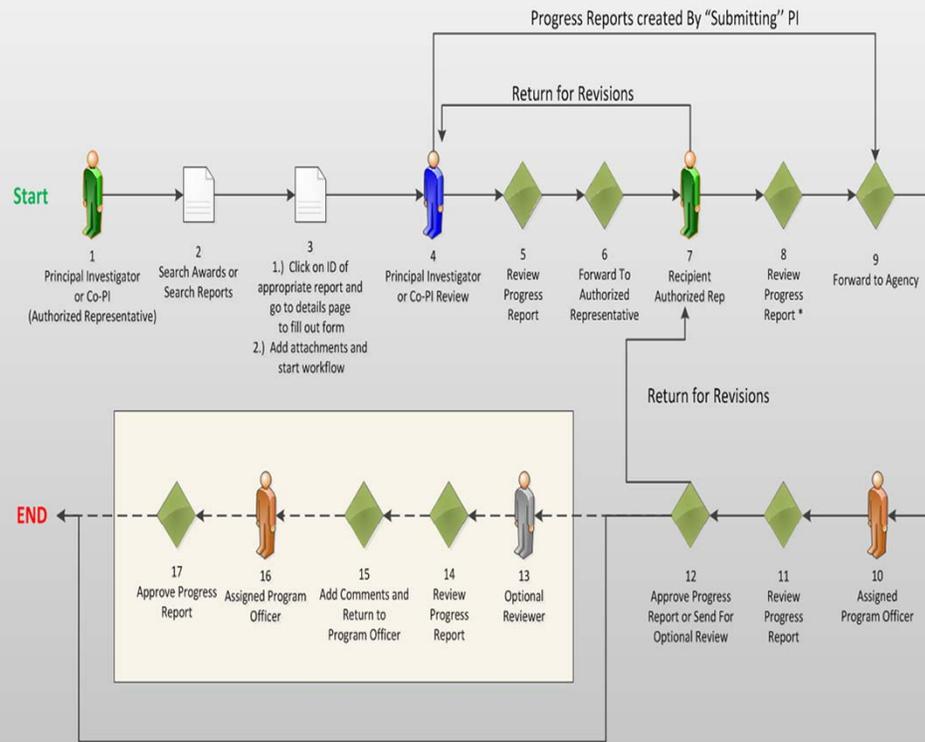


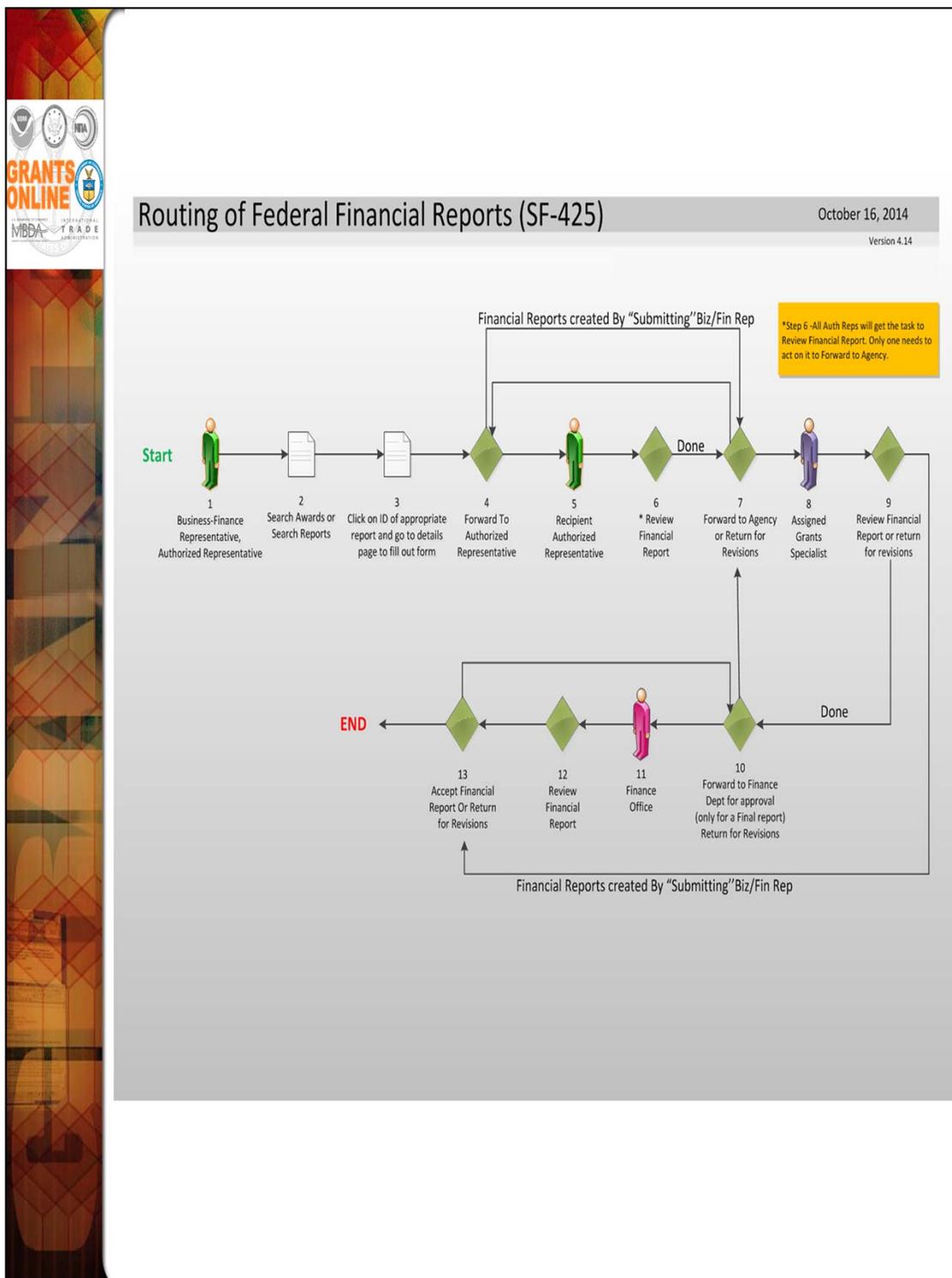
# Routing of Performance Progress Report (PPR)

October 16, 2014

Version 4.14

\*Step 8 - All Auth Reps will get the task to Review Progress Report. Only one needs to act on it to Forward to Agency.





Within NOAA, the user is only required to complete two fields (Cash Receipt & Cash Disbursements) for the interim Federal Financial Report; however for the final Federal Financial Report, all fields need to be completed. All other Bureaus are required to complete all fields on both the interim and final Federal Financial Reports.

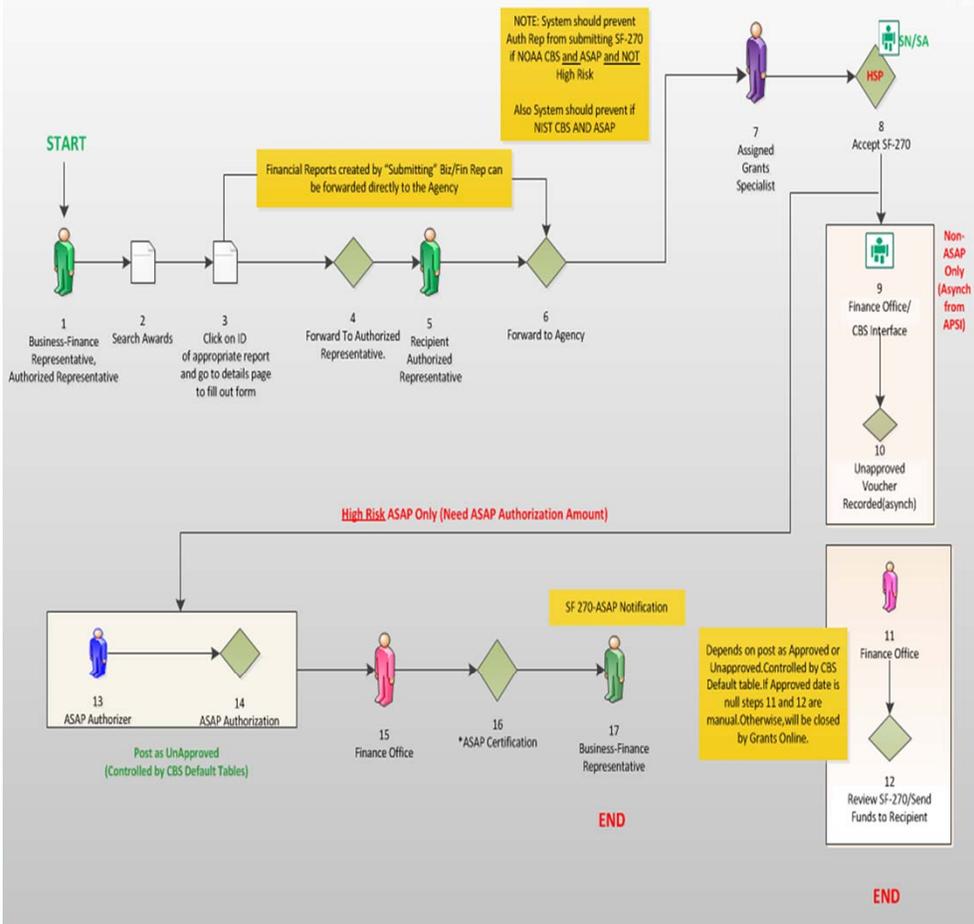


### Routing of Federal Financial Reports (FR-2)

February 27, 2013

Version 4.10

(SF-270)





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# Grants Online Training Post Award Processes

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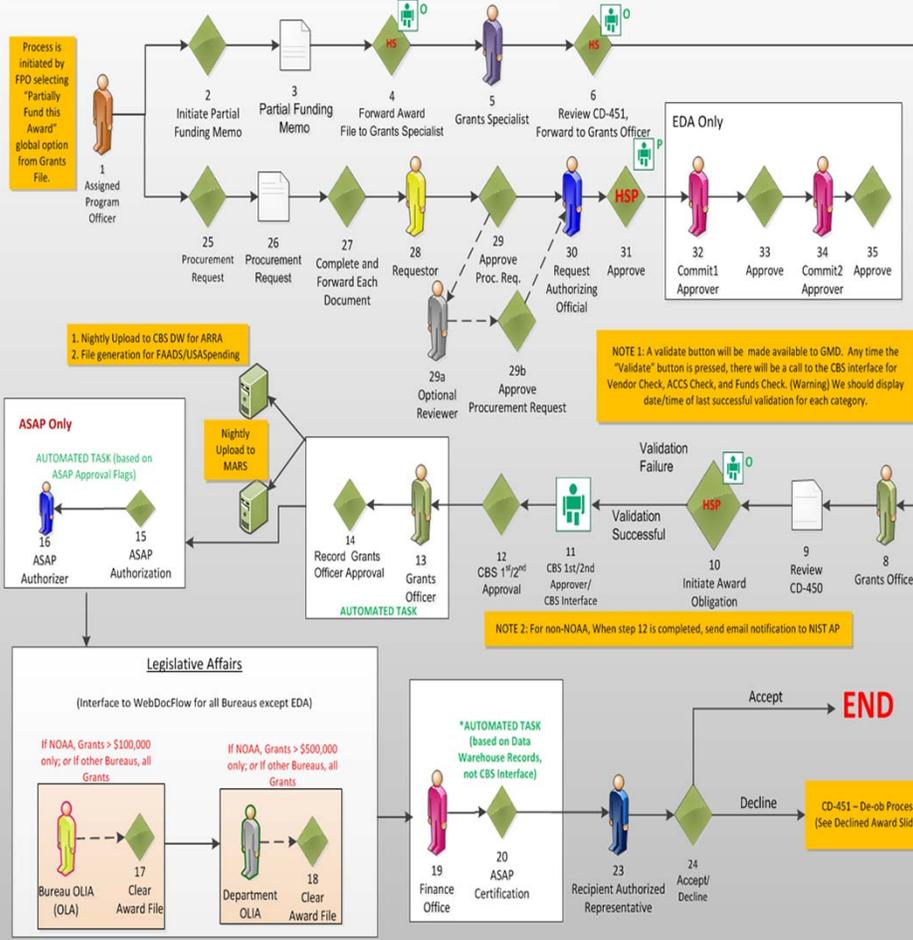
May 2015



# Partial Funding Workflow (PR-1)

May 8, 2015

Version 4.15





## FPO – Partial Funding Steps 1 – 3

### 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	Pri Inv Dir
NA09GOT4990038	2001932	Institute for Culturally Managed Resources (ICMR)	TEST RECORD - Grants Online Training Application05	Accepted	None
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
NA09GOT4990074	2001932	Institute for	TEST RECORD - Grants	Accepted	None Designated

### Grants File - NA09GOT4990038

**Id:** 2139154  
**Status:** Accepted

**Action:**  ▾

**Your Comments:**  ▾  
 (highlighted)

1. From the Award Tab, search for the Award that will be Partially Funded.
2. From the Grants File Launch Page select “Partially Fund this Award” from the Action dropdown list.
3. Click the “Submit” button.



## FPO – Partial Funding Steps 4 and 5

Partial Funding -- NA09GOT4990038

Memo \* [Guidance](#)

### Approved Plan and Prior Obligations

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

### Selected Application

None

### Approved Plan and Prior Obligations

Action	Application ID	Project Title
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

4. Click the “plus” (+) beside the Action box to get details for the appropriate application for Partial Funding. (All applications associated with the Award will be available. However, Partial Funding can be applied to only ONE application at a time.)
5. Click the “Select” button to chose the desired application.

## FPO – Partial Funding Step 6



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

SF-425 Frequency: Semi-Annual Cash Flow with Report (after 3/31/2009)      Frequency: 4/1/2009

Progress Report Frequency: Semi-Annually      Progress report is [blank]

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.

### Grants Online Partial Funding Guidance

#### Partial Funding Memo

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

6. Reference the "Guidance" link for an example of the language that should be used for the Memo box.



## FPO – Partial Funding Steps 7 – 9

Partial Funding -- NA09GOT4990038

Memo <sup>\*</sup> [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 <sup>*</sup>	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		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.*

7. Enter the amount for Partial Funding into the “Fed Add Amount” box and, if appropriate, the amount for the “Non-Fed Amount.”
8. Click “Save and Start Workflow.”
9. Click “OK” on the warning message alerting you that a Procurement Request is being added to your task box. The user will be returned to the launch page of the new Award File.



## FPO – Partial Funding Step 10 – 11

### Your Tasks

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

34 items found, displaying all items.1

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

10. Navigate to the “Inbox/Task” screen. There should be two new tasks:

- (a) Procurement Request and Commitment of Funds
- (b) Review Release of Funds

The Procurement Request should be completed and sent through the workflow process. The steps to complete the Procurement Request are the same as those used for a new award and will not be repeated here.

11. Click the “View” link for Review Release of Funds.

## FPO – Partial Funding Step 12



**Award File In Progress - NA09GOT4990038**

**ID:** 2147952  
**Status:** ProgramOfficerActions - Not Started

**Action:** Forward to Grants Specialist for Review

**Your Comments:**

**Print Award File History**

**Attachments:**

**Pending Actions** X

One item found.

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

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

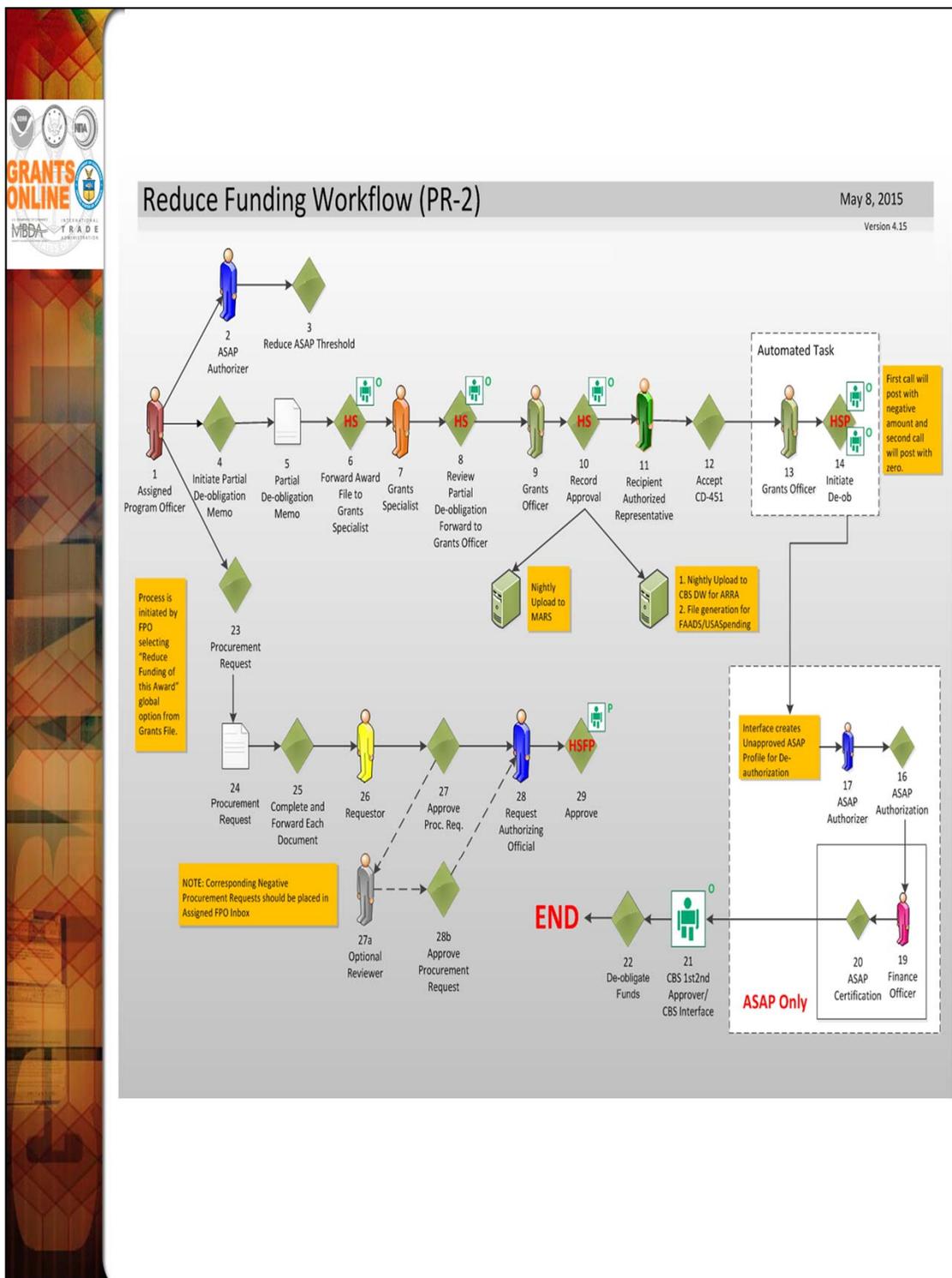
- Usually, after the Procurement Request has been approved, the user can select "Forward to Grants Specialist for Review" and add a workflow comment. Do not make any modifications to the "Amendment Details"; this will be done by the Grants Specialist. If changes to the Partial Funding Memo or Funding Amounts are necessary 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 the user's Inbox. Make certain the same changes are made on both documents (the Procurement Request and Commitment of Funds and the Review Release of Funds).



## 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, the Program Office needs to advise the Grants Officer. This allows the Grants Officer to create an amendment informing the recipient that no additional funds will be provided. The recipient has 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 to 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
<span style="background-color: #0056b3; color: white; padding: 2px 5px;">Select</span>	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

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



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
<a href="#">View</a>	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
<a href="#">View</a>	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	<a href="#">Edit</a> <a href="#">Delete</a>

[Add New ACCS Line](#)

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

Similar to a Partial Funding, two tasks are generated in the FPO's Inbox. The Procurement Request must be filled out using negative numbers for the funding reduction. The workflow must be completed by the Authorizing Official (Budget Officer role) to allow the Procurement Request to be forwarded to the Grants Management Division.



MEMORANDUM: NOAA Finance Office  
 FROM: Grants Management Division  
 SUBJECT: DE-OBLIGATION  
 De-obligation Request for Award: NA12GOT9990023

**Total Federal Funding (entire award):** \$10,000.00  
**Recipient Name:** Environmental Action Committee of West Marin  
**EIN:** 237115368  
**DUNS:** 793971490  
**ASAP ID (if applicable):**  
**Award Period:** 05/01/2012 - 04/30/2013  
**Federal Program Officer:** Grants Student00  
**Obligation Number:** 374002  
**Requested De-obligation Amount:** \$100.00

Item #/MDL	ACCS	Amount
2245494 / 2025338 14 2012 2000 52-30-00-000 SAE0000-SAE 10-01-0002-00-00-00 41-12-00-00		(\$100.00)

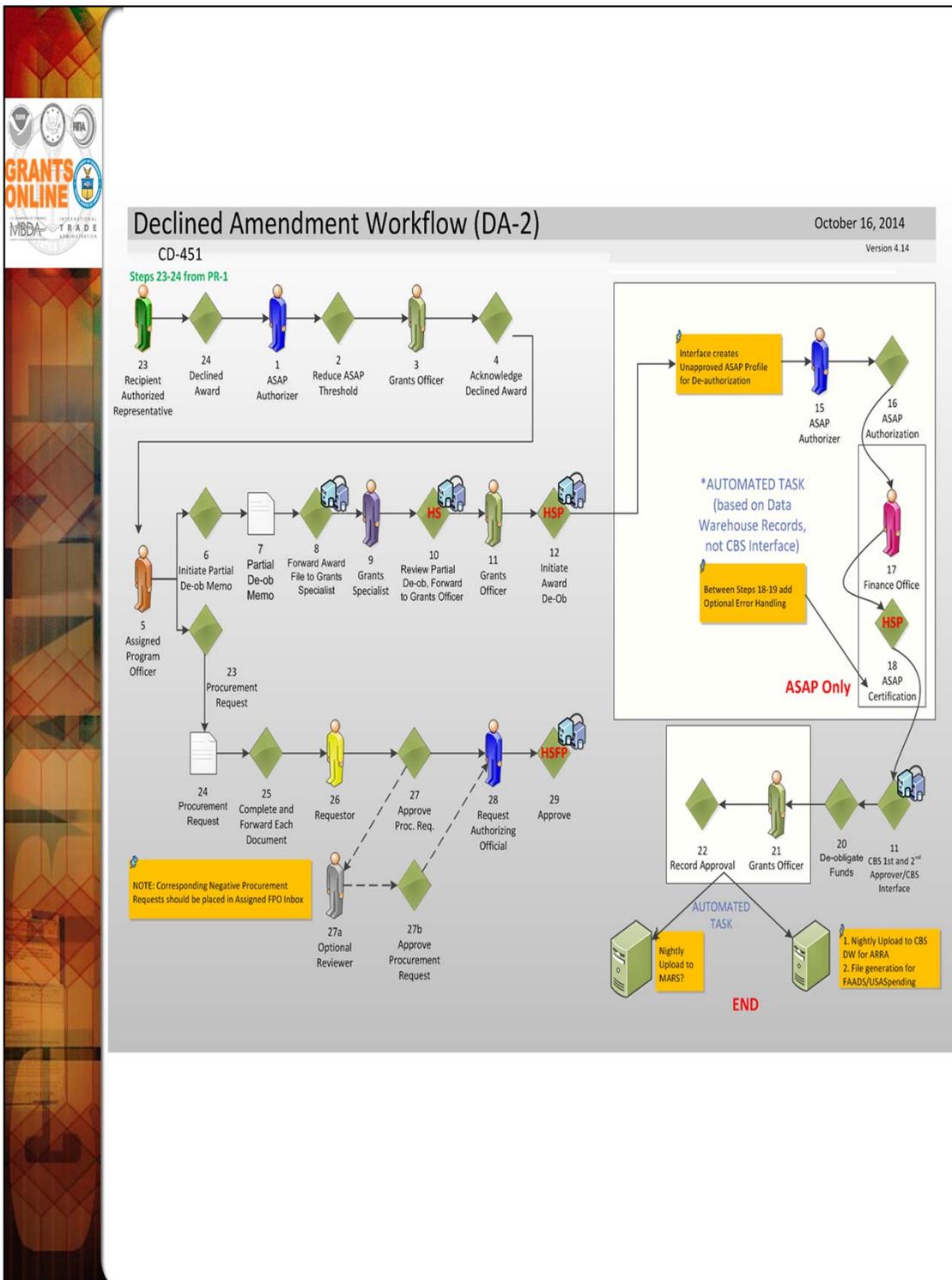
The Grants Management Division has reviewed the subject award. This document serves as authorization to proceed with the de-obligation process.

**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

The Award File for a Reduction in Funding contains a de-obligation memo. This is used to document the de-obligation by the system via the interface. In the case of a non-interfaced award the workflow will go through the Finance Office where the de-obligation memo will be manually approved. There is no action required by the Federal Program Officer relative to the de-obligation memo. However, the memo is available for viewing by the Federal Program Officer.

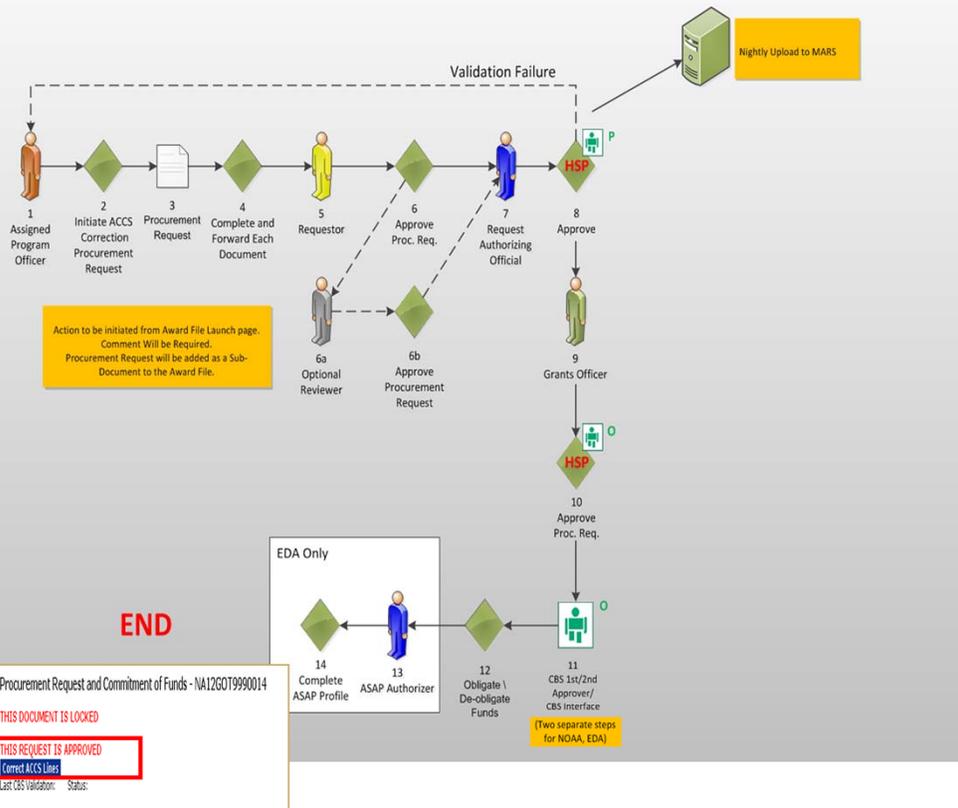


For a Federal Program Officer, the Declined Amendment workflow looks similar to a Reduction in Funding. However, the tasks are generated when the Grants Officer acknowledges the declined award rather than the Federal Program Officer initiating the action.



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

May 8, 2015  
Version 4.15



**END**

Procurement Request and Commitment of Funds - NA12GOT9990014

THIS DOCUMENT IS LOCKED

THIS REQUEST IS APPROVED

Correct ACCS Lines

Last CBS Validation Status:

**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

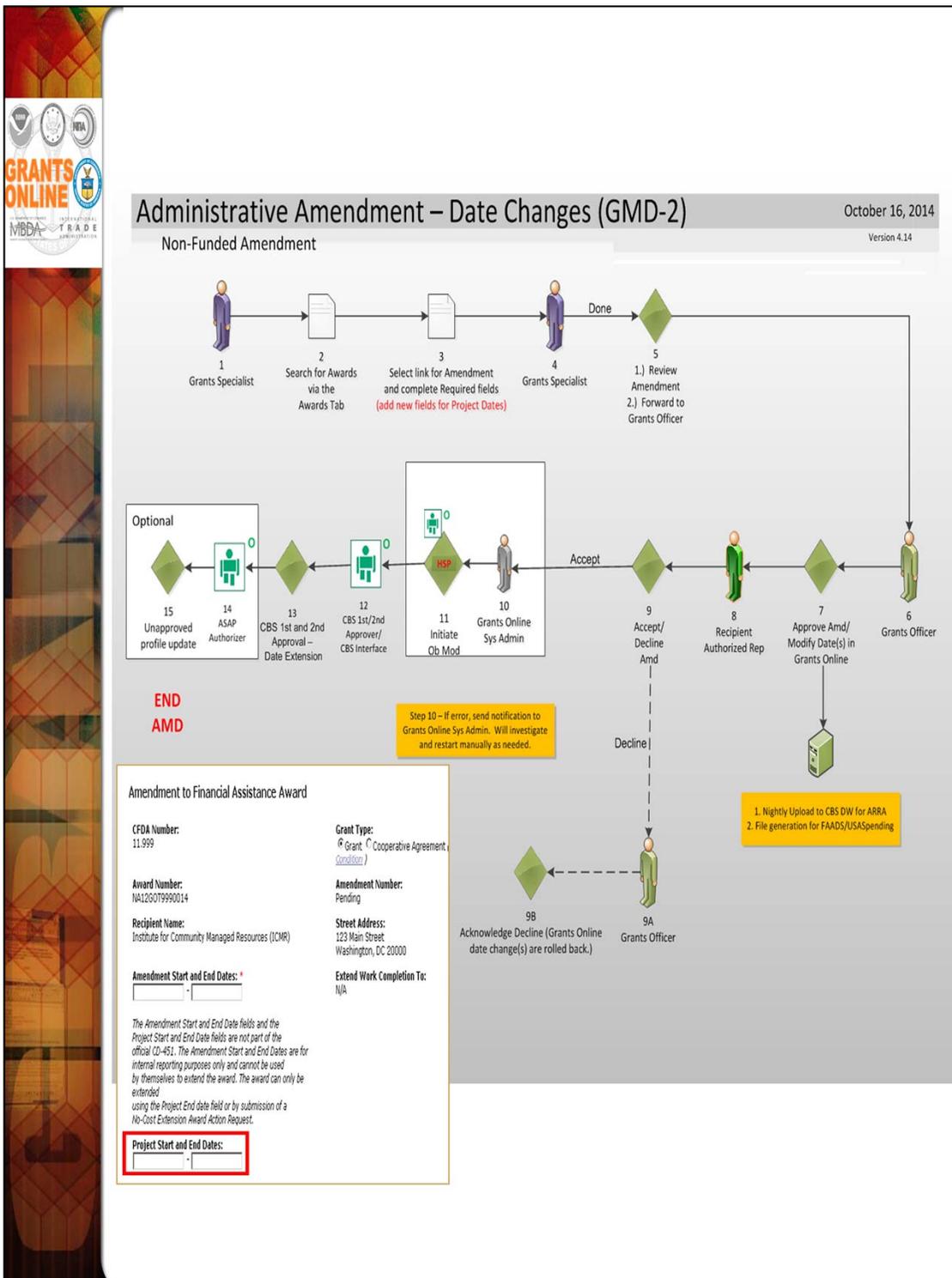
Total Federal funds authorized for this Award action: \$10,000.00



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

- 1. Navigate to the Award File containing the Procurement Request that needs to be corrected.**
- 2. Access the details page of the Procurement Request that needs to be corrected.**
- 3. Click the “Correct ACCS” button. This will generate a new “zero-dollar” Procurement Request.**
- 4. Edit the ACCS line to make the amount (or a portion of the amount) negative.**
- 5. Add one or more positive ACCS lines to create 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 for the Award can make a correction to an ACCS line on an award that has been approved.**



The Grants Management Division can now create an administrative amendment to make corrections to the Project Start and/or End Dates without requiring the recipient submit a No-Cost Extension request.

**GRANTS ONLINE**

NOAA  
NINA  
MBA  
TRADE

Inbox Awards **Account Management** Help

Welcome to Grants Online Arthur Rep00. Your password expires in 16 days. You are logged in to TRAIN1P. [Log Off](#)

Advisories >> [Organization Profile Change Request](#)

**Organization Profile Change Request**  
 Organization: Institute for Community Managed Resources (ICMR) (2002469)  
 Request ID: 2277047

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	Tamuning	<input type="text"/>
State	GU - Guam	<input type="text"/>
Zip/Postal Code	20000	<input type="text"/>
Country	GUM - Guam	<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	Tamuning	<input type="text"/>
State	GU - Guam	<input type="text"/>
Zip/Postal Code	20000	<input type="text"/>
Country	GUM - Guam	<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"/> <a href="#">Enroll in ASAP &gt;&gt;</a> (When selecting this option, other changes will be ignored.)
Applicant Type	M - Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)	<input type="text"/>
*Justification for Changes		
<input type="text"/>		

This Grants Online component allows recipients to request changes to Organization and Vendor records. In addition, from this screen Non-ASAP recipients can initiate the ASAP Enrollment process. There is no need to send a separate email, simply submit the recipient's Point of Contact information.

For detailed Organization Profile Change Request information, please reference the link:  
[http://www.corporateservices.noaa.gov/grantsonline/Documents/Grantees/Org\\_Profile\\_Change\\_Requests\\_Grantees.pdf](http://www.corporateservices.noaa.gov/grantsonline/Documents/Grantees/Org_Profile_Change_Requests_Grantees.pdf)

**NOTE:** The user cannot update the DUNS or EIN using the Organization Profile Change Request.



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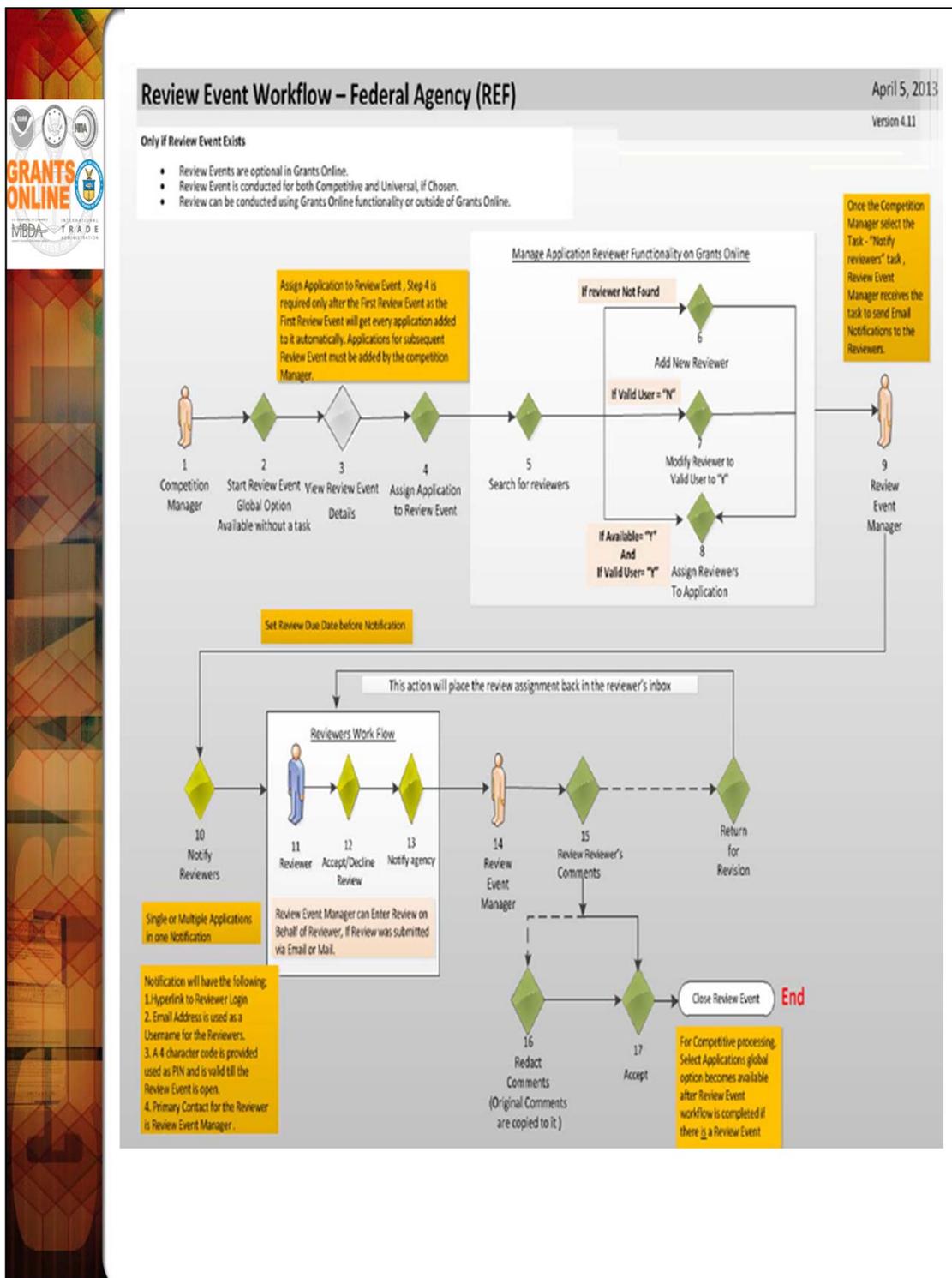
## Grants Online Training

Review Event

Process Maps

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May 2015



For further training material, please refer to item #15 on the PMO website:

**Review Event Quick Reference Guides**

- Creating a Review Event
- Conducting a Review Event
- Conducting an Application Review



# Review Event Workflow – Reviewer (RER)

April 5, 2013

Version 4.11

Federal Employees, determine the Conflict of Interest by the Federal Ethic Laws.  
Non-Federal Employees determine the Conflict of interest by CD-571(a) confidentiality certification for Non Governmental Peer Reviewers.

