



Grants Online Training

New Federal Program Officers

November 2016

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Federal Program Officer Training Agenda

Day 1

Grants Online Overview, RFA Creation, & Award Package Processing
Introduction and Agenda
Grants Online Overview and Log On
Hands-On Participation – Non-Competitive RFA Creation & Application Processing
Hands-On Participation – Competitive RFA/Federal Funding Opportunity Creation
Demo Only – Application Review and Competitive Selection Package
Hands-On Participation – Award Package Processing
Wrap Up: Additional Resources and Training Questions/Concerns & Answers

* Breaks and Lunch will be scheduled at convenient stopping points

OBJECTIVES – By the end of the day, students should:

- Understand the roles of Grants Online and the Grants Online PMO within the Department of Commerce Grants community
- Understand the underlying structure of the Grants Online system
- Locate basic Grants Online application and award information
- Understand the difference between a Competitive RFA and other types of Universal RFA (previously aggregated using the label “Non-Competitive”)
- Understand the difference between the Certified and Uncertified Federal Program Officer/Program Office Staff roles
- Create and route a Universal RFA
- Create a Competitive RFA and route documents for publication
- Understand the Competition Manager and Selection Official functions in the Competitive RFA workflow
- Input a paper application and complete the “Review Minimum Requirements” task
- Conduct Negotiations and prepare an Award File for Grants Management review
- Understand the Award File approval and acceptance process
- Know where to find help when needed

TRAINING MATERIALS:

1. Agenda and Objectives
2. List of Acronyms
3. Grants Online Overview Presentation
4. Grants Online User Roles (Spreadsheet)
5. Grants Online User Roles – Federal and Grantee (Definitions)
6. System Navigation Manual
7. Process Maps and Screen Shots



Grants Online Overview

November 2016

Project Goals

- A scalable solution for high volume usage and robust, available operation
- A DOC interface to the Grants.gov initiative which provides “one-stop” shopping for Federal grants-related activities
- Standardized DOC grants business processes that will contribute to a more efficient and effective use of resources
- A direct interface to other Federal and DOC systems (e.g., Grants.gov, CBS, and WebDocFlow-Grants)

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

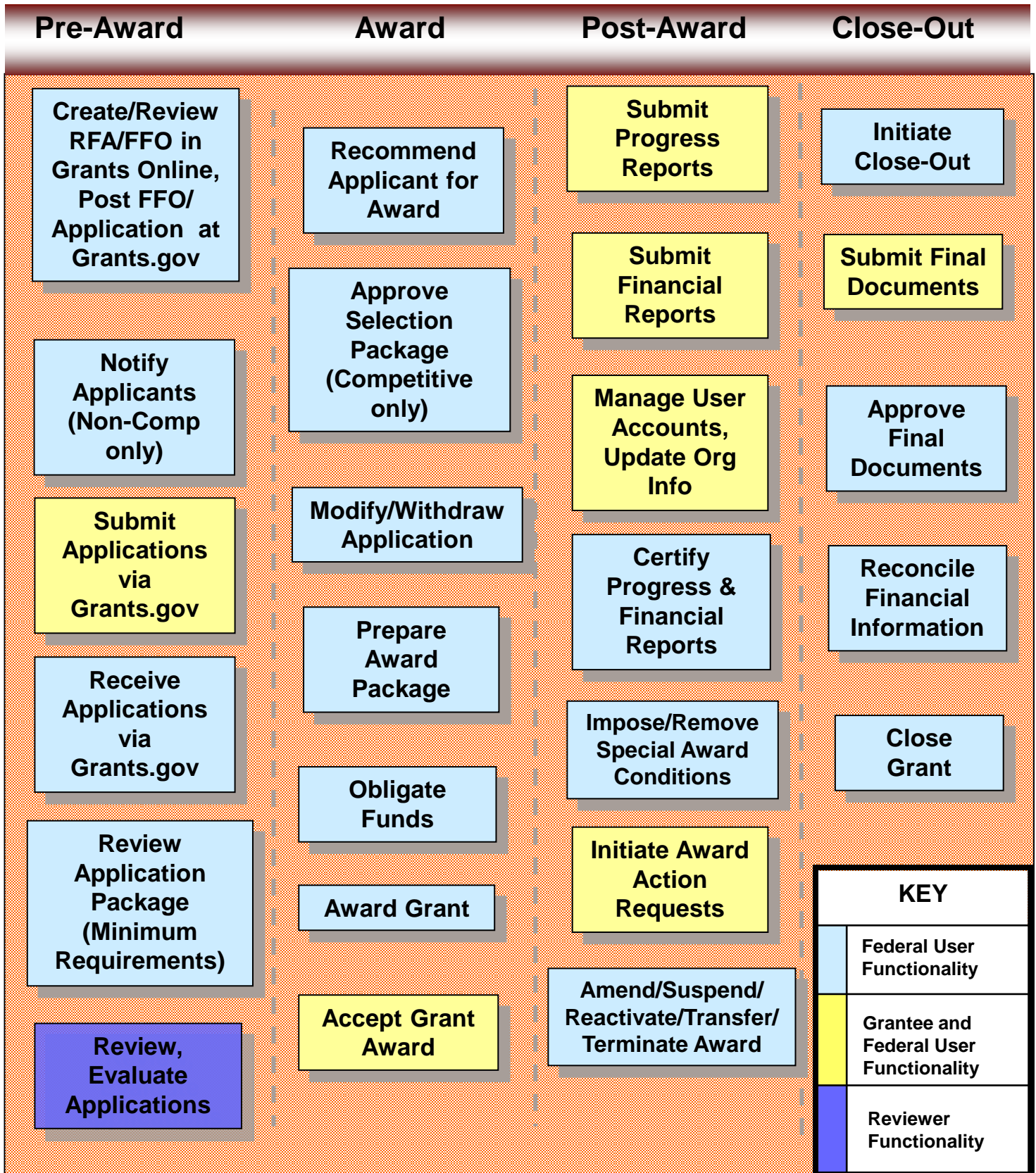
CBS Interface (NOAA Only) – June 2012

Rollout to EDA – FY 2015

Rollout to Census – FY 2016

Rollout to NIST – FY 2018 (In Planning)

Grants Life Cycle



Grants Online System Requirements

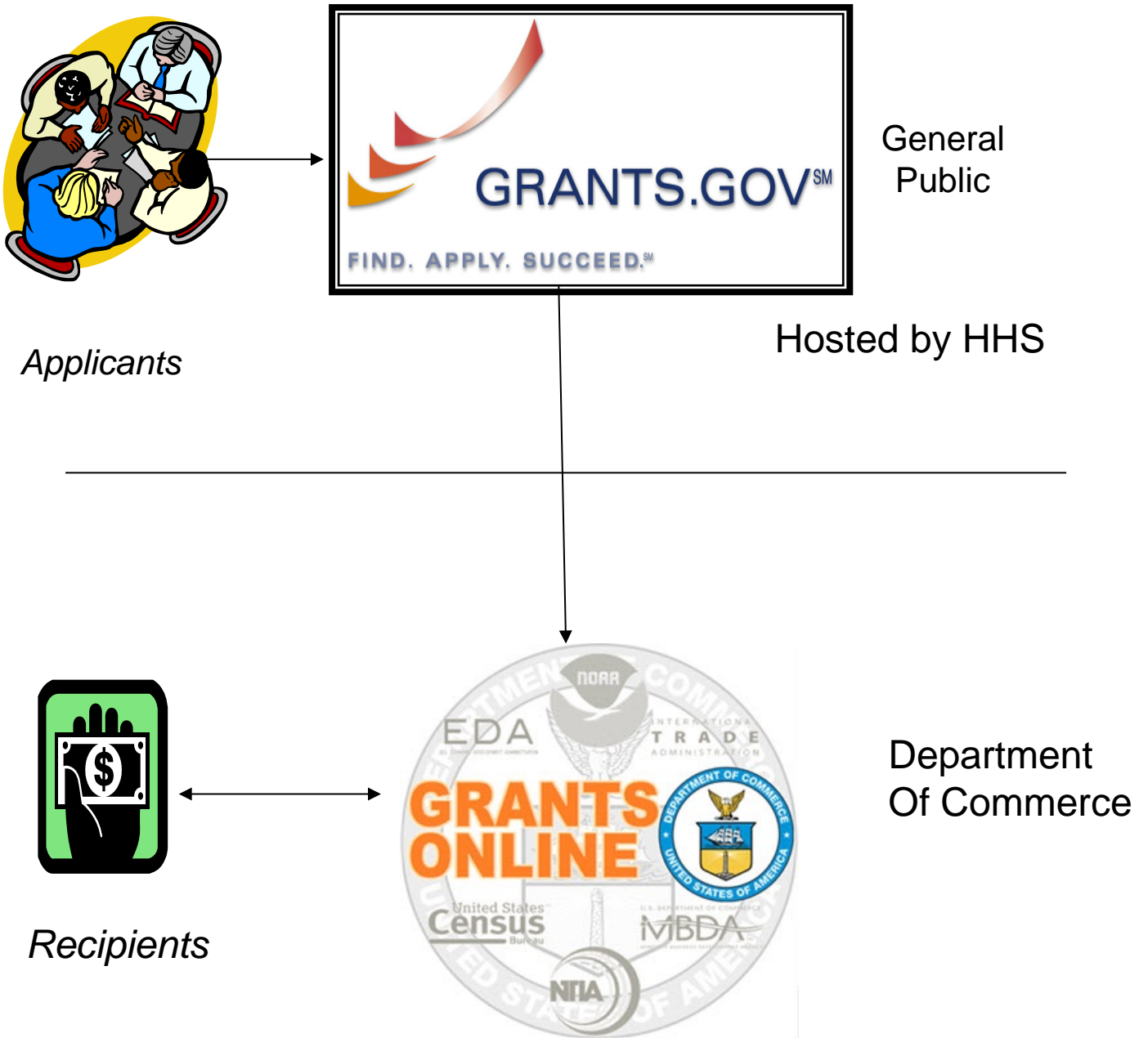
The System

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.

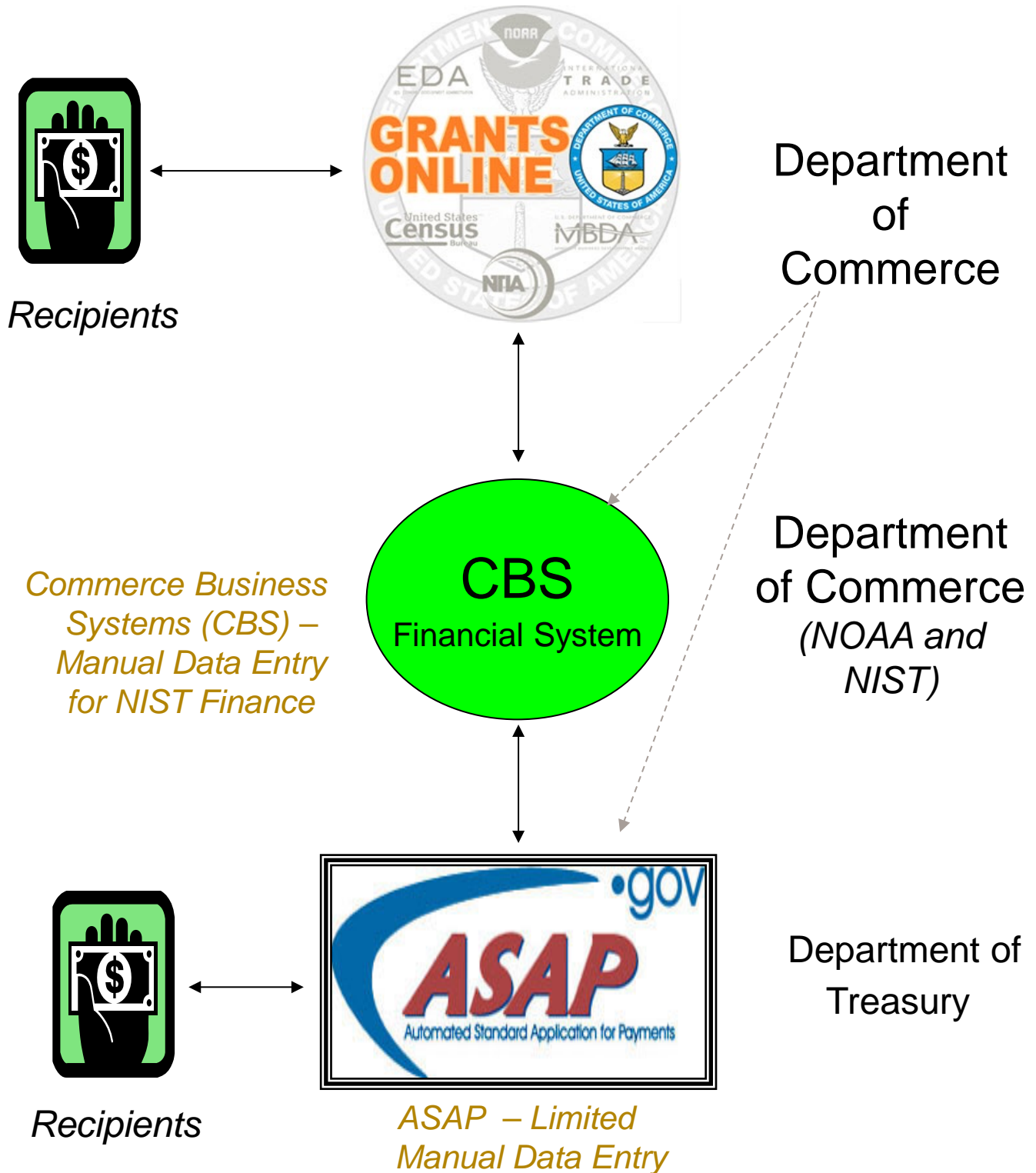
Recommended Internet Browsers:

- Windows – Internet Explorer 8 or higher
 - Attachments are supported in IE 11, after the settings are updated. For step-by-step instructions, please reference the following document:
<http://www.corporateservices.noaa.gov/grantsonline/pdfs/IE%20Compatibility%20View%20Fix.pdf>
- Mac – Safari 3.1 or higher
- Windows or Mac – Firefox 2.0 or higher
- Google Chrome

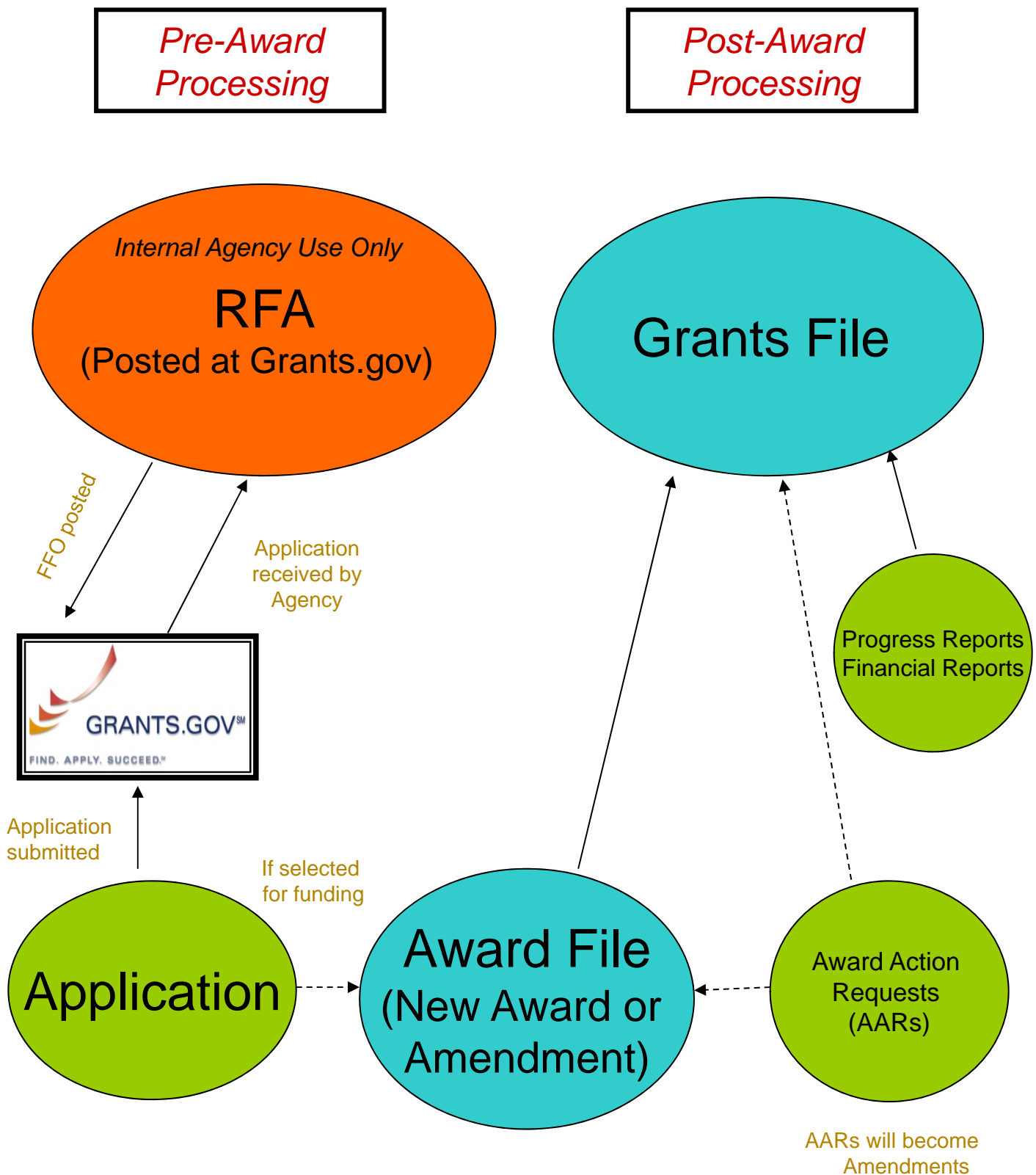
Grants Online and Grants.gov



Grants Online and ASAP

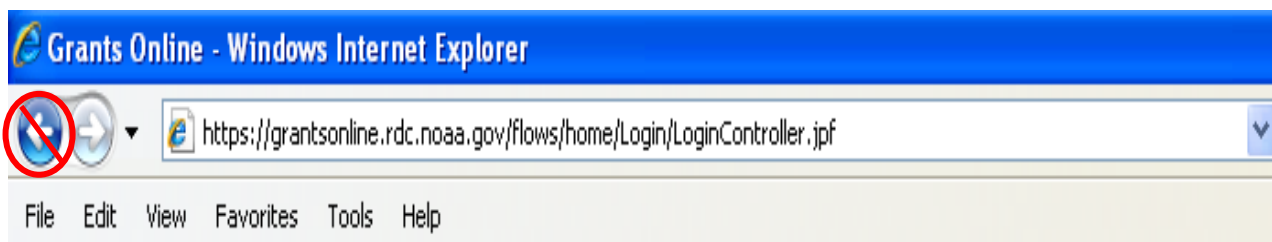


Grants Online Document Relationships

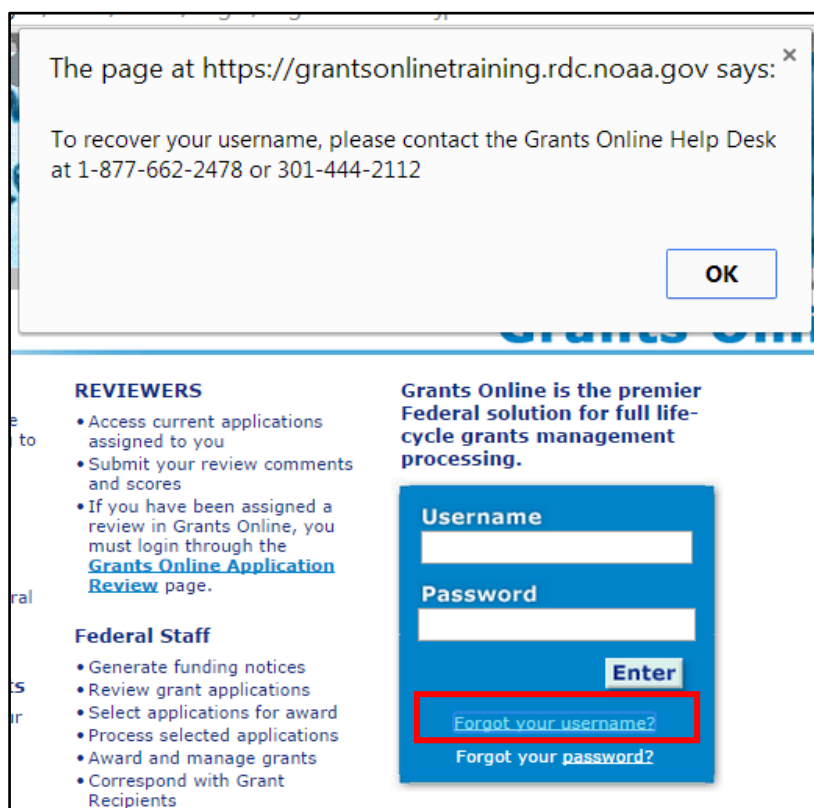


Grants Online Helpful Hints

- **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.



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.***



The screenshot shows the Grants Online interface. The top navigation bar includes links for 'Inbox', 'RFA', 'Application', 'Awards', 'Account Management', 'Reports', and 'Help'. The 'Inbox' link is highlighted with a red box. Below the navigation bar, the 'Tasks' link in the left sidebar is also highlighted with a red box. The main content area displays 'Your Tasks' with a table of 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
View	2564265	Notify Recipients	In Progress	RFA	2256808	05/20/2014		N/A
View	2556044	Notify Recipients	In Progress	RFA	2256757	05/01/2014		N/A
View	2556041	Conduct Negotiations	In Progress	Application	2256738	06/12/2014		NA14GOT9990069
View	2554004	Review Award Action Request	Not Started	Award Action Request	2256304			N/A
View	2553976	Review Award Action Request	Not Started	Award Action Request	2256303			N/A
View	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	Edit Delete
Add New	

Attachments:

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

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

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

9 items found, displaying all items.1

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

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

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)*
- **Project Officer (EDA specific role)**
 - Fulfills roles of both the Program Office and Grants Office, with the exception of the final Grants Officer review and approval

Grants Management Advisory Council (GMAC) Contacts

NOAA/NESDIS	Ericka Rosier	301-683-3512
NOAA/NMFS	Dan Namur Dennis Taylor	301-427-8730 301-427-8842
NOAA/NOS	Kadija Baffoe-Harding Laurie Golden	240-533-0955 240-533-0285
NOAA/NWS	Carla Kirby	301-427-6923
NOAA/OAR	Brenda Alford	301-734-1174
NOAA/OED	Carrie McDougall Meka Laster	202-482-0875 301-628-2906 x82906
MBDA	Joann Hill Nakita Chambers	202-482-4826 202-482-0065
ITA	Brad Hess Annette Henderson	202-482-2969 202-482-3995
NTIA/BTOP	Wayne Ritchie Laura Pettus	202-482-5515 202-482-4509
EDA*	Phil Saputo Tom Guevara	202-400-0662 202-482-5891

* Regional & Area Directors are also authorized to request user account updates for their region.

NOTE: Contact Name & Phone Number based upon Dept. of Commerce or NOAA Personnel Directories -- Accessed: October 12, 2016

Grants Online Training and Help Desk

▪ Grants Online Website

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



Grants Online Training Acronyms & Roles

November 2016

DOC Grants and Grants Online Acronyms

AAR	Award Action Request
ACCS	Accounting Classification Code Structure
AGO	Acquisition & Grants Management Office, NOAA
AO	Authorizing Official on Procurement Requests (see also BO)
AR or AOR	(Recipient) Authorized Representative
ARRA	American Recovery and Reinvestment Act
ASAP	Automated Standard Application for Payment (Department of the Treasury)
BAA	Broad Agency Announcement
BO	Budget Official (In Grants Online this is the Procurement Request Authorizing Official)
CAMS	Commerce Administrative Management System (now known as CBS)
CBS	Commerce Business Systems (formerly CAMS)
CCR	Central Contract Registry (now known as System for Award Management (SAM))
CD	Congressional District
CD-XXX	Commerce Department Form Number (e.g., CD-435, CD-450, CD-451)
CESU	Cooperative Ecosystem Studies Units
CFDA	Catalog of Federal Domestic Assistance
CFR	Code of Federal Regulations
CI	Cooperative Institute
CM	Competition Manager
Co-PI	(Recipient) Principal Investigator - Secondary
DOC	Department of Commerce
DOC-OS	Office of the Secretary, DOC
DUNS	Dun & Bradstreet Number
EDA	Economic Development Administration
ERA	Electronic Recipient Acceptance
EIN	Employer Identification Number
FAADS	Federal Assistance Award Data System
FAIS	Federal Assistance Information Sheet
FALD	Federal Assistance Law Division of DOC
FCS	U.S. and Foreign Commercial Service, ITA
FFO	Federal Funding Opportunity
FFR	Federal Financial Report
FIPS	Federal Information Processing Standards
FON	Funding Opportunity Number
FPO	Federal Program Officer
FRN	Federal Register Notice
GMAC	Grants Management Advisory Committee (NOAA)
GMD	Grants Management Division (NOAA and NIST); other agencies use the term Grants Management
GO	Grants Officer
GS	Grants Specialist
HDQ	Headquarters (EDA Line Office)
IA	Import Administration, ITA
ITA	International Trade Administration
LO	Line Office
MARS	Management Analysis and Reporting System
MBDA	Minority Business Development Agency
NCE	No Cost Extension
NEPA	National Environmental Policy Act
NESDIS	National Environmental Satellite, Data, and Information Service (NOAA Satellite Service)
NFA or OFA	NOAA Finance and Administration
NMFS	National Marine Fisheries Service (NOAA Fisheries Service)
NOAA	National Oceanic and Atmospheric Administration

DOC Grants and Grants Online Acronyms

NOFA	Notice of Funds Availability (See FFO, FRN, RFA)
NOS	National Ocean Service (NOAA's Ocean Service)
NTIA	National Telecommunications and Information Administration
NWS	National Weather Service, NOAA
OAR	Ocean and Atmospheric Research (NOAA Research)
OCPO	One Commerce Program Office
OIE	Office of Innovation and Entrepreneurship (EDA Program Office)
ONPO	One NOAA Program Office
OGC	Office of General Counsel, DOC
OHRM	Office of Human Resource Management, DOC-OS
OIG	Office of Inspector General, DOC
OLA	Office of Legislative Affairs (Bureaus)
OLIA	Office of Legislative and Intergovernmental Affairs, (Bureaus and DOC)
OMB	Office of Management and Budget (part of the Executive Office of the President)
ONPO	One NOAA Program Office
OS	Office of the Secretary, DOC
OTIA	Office of Telecommunications and Information Applications, NTIA
PD	(Recipient) Project Director
PI	(Recipient) Principal Investigator
PO	Program Office (sub-organization under a Line Office)
PPR	Performance Progress Report
PRCF	Procurement Request and Commitment of Funds (CD-435) / Funding Memo
RFA	Request for Application
RNTA	Research and National Technical Assistance (EDA Program Office)
SAC	Special Award Conditions
SAM	System for Award Management
SEC	Office of the Under Secretary for Oceans and Atmosphere (USEC abbreviated to SEC for use in FON)
SF-XXX	Standard Form issued by the Office Management and Budget (e.g., SF-424, SF-269, SF-270, etc.)
SO	Selecting Official
TAAF	Trade Adjustment Assistance for Firms (EDA Program Office)
USEC	Office of the Under Secretary for Oceans and Atmosphere (NOAA Upper Management)

For the Grants Online Glossary, please reference:

http://www.corporateservices.noaa.gov/grantsonline/Documents/GrantsOnline_Glossary.pdf

Grants Online User Roles - Federal

FUNCTIONS / ROLES	Cert FPO	UnCert FPO	Pgm Office Staff	Budget Officer (Auth Official)	Pgm Office Reviewer	Pgm Office Requestor	NEPA Official	Selecting Official	GMAC	Grants Specialist	Grants Officer
<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								
<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										
<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	
<i>Review Procurement Request</i>	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

FUNCTIONS / ROLES	Recipient Auth Rep	Recipient Admin	Recipient PI/PD	* Recipient PI/PD - Submitting	Recipient Biz/Fin Rep	* Recipient Biz/Fin Rep - Submitting	Recipient Key Personnel
<i>View/Access All Org. Awards</i>	X	X			X	X	
<i>View/Access Assigned Awards</i>			X	X			X
<i>Accept or Reject Award</i>	X						
<i>Manage Recipient Users</i>		X					
<i>Reassign Tasks</i>	X	X					
<i>Initiate Award Action Request</i>	X	X	X	X	X	X	X
<i>Submit Award Action Request</i>	X						
<i>Complete Progress Report</i>	X		X	X			
<i>Submit Progress Report</i>	X			X			
<i>Complete Financial Report</i>	X				X	X	
<i>Submit Financial Report</i>	X					X	
<i>Submit ASAP Enrollment</i>	X						

* Recipient Administrator needs to confer "Submitting" Role

Grants Online User Role Definitions

ROLE NAME	DEFINITION
ASAP Authorizer	This role is given to the users who are responsible for the first step (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.
Budget Officer (Procurement Request Authorizing Official)	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.
CAMS First Approver CAMS Second Approver CAMS First and Second Approver	These roles are given to users responsible for entering grant obligations into the instance of the Department of Commerce's CBS that tracks financial actions for that particular Bureau. The business process is slightly different at different bureaus so the various roles reflect these differences.
CAMS First Approver - D CAMS Second Approver - D CAMS First and Second Approver - D	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.
CESU Manager (NOAA Only)	This role provides oversight for CESU (Cooperative Ecosystem Studies Units) Awards.
Commit1 Commit2	These roles are given to users responsible for entering grant commitments (reservation of funds) into the instance of the Department of Commerce's CBS that tracks financial actions for that particular Bureau. The business process is slightly different at different bureaus so the various roles reflect these differences.
Credit Checker	This role is given to the user within a particular Bureau who is responsible for requesting credit checks as needed during the preparation of an award file for Grants Officer signature.
Director (EDA Only)	This role is unique to EDA and is given to the user who has Director-level approval authority on award actions and payments.
FALD	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.
Federal Program Officer - Certified	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 Grants Management. Within Grants Online, only FPOs who are Certified can communicate between their own Program Offices and outside entities such as FALD, Grants Management, and Recipients. For instance, an Uncertified FPO cannot "Certify" a PO Checklist or forward an Award File to Grants Management. Persons given this role are assumed to have obtained a certain level of training in the Grants Management arena.
Federal Program Officer - Uncertified	This role is intended for persons who are on track to become Certified Federal Program Officers but have not yet obtained the necessary credentials required by their Line Office. They may assist with all tasks normally done by a Certified Federal Program Officer, but cannot forward any documents to entities outside of their own Program Office. The documents must be reassigned to a Certified Federal Program Officer for that purpose.
Finance Office	This role is given to 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.
Finance Reviewer	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

GMAC <i>(Grants Management Advisory Committee)</i>	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.
Grants Officer	This role is reserved for Grants Management personnel who have been given authority to make award offers to recipients on behalf of DOC. They also make the final decisions with regard to approval or denial of Award Action Requests. This role is accompanied by a system enforced approval threshold for funding.
Grants Specialist	This role is given to Grants Management 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.
Lead Budget Officer	The Lead Budget Officer has the responsibility of maintaining all of the Unique Account Descriptor codes in the Grants Online system for a particular Line Office.
NEPA Official/Coordinator	The NEPA Official reviews and approves the NEPA documentation as part of an Award File prior to submission to Grants Management.
NEPA Reviewer	The NEPA Reviewer provides an additional review of the NEPA documentation as part of an Award File prior to submission to Grants Management.
OLA	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.
OLIA	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.
Program Office Requestor	The role of Program Office Requestor is given to a user whose only function is to provide first-level "Requestor" approval on Procurement Requests (CD-435) prior to submission to the Budget Officer.
Program Office Reviewer	This role is usually given to a person who needs to be included in the workflow to review a Request For Application (RFA), a Procurement Request, or a Performance Progress Report (PPR) but has no other role in Grants Online.
Program Office Staff	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.
Progress Report Reviewer	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.

Grants Online User Role Definitions

Public Affairs Liaison	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.
Recipient Administrator	Users with this role have the permissions needed to set up other people in their organization as users of the Grants Online system and to give them access to specific awards as appropriate.
Recipient Authorized Representative	This role is intended for recipient users with signature authority to sign official grant documents such as an SF-424 (application), or 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.)
Recipient Business/Finance Representative	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.
Recipient Key Personnel	This role can view assigned awards for their organization and initiate Award Action Requests. However, a person with this role must submit documents to his/her organization's Authorized Representative. The Authorized Representative will review and submit documents to the agency.
Recipient Principle Investigator	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.
RFA Publisher	This role is given to users who are responsible for posting grant opportunity notices at Grants.gov.
Selecting Official	The role of Selecting Official is given to a user who has the authority to approve the Selection Package generated from applications received in response to a Competitive funding announcement.
Vendor Control	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.
Vendor Validator	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
View Program Office (Line Office, Agency)	This role is available for Federal staff who need view-only access to Grants Files. The role is available at three different levels: Program Office, Line Office, or Bureau (Agency).



Grants Online Training System Navigation

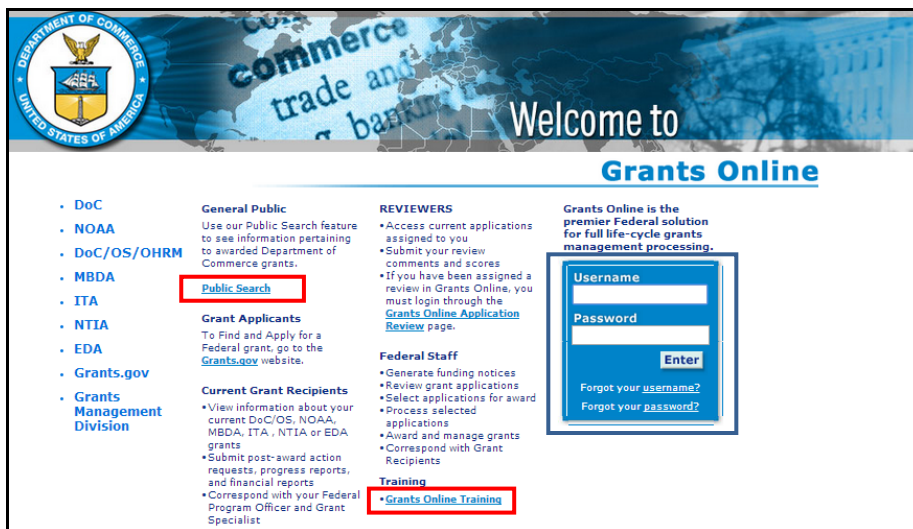
November 2016

Overview

This document provides step-by-step instructions that facilitate the Federal Program Officer's (FPO) navigation of the Grants Online system.

Accessing Grants Online

1. Type <https://grantsonline.rdc.noaa.gov> in the address bar of your browser to launch the Grants Online home page.
2. 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 of his/her account. The user must click 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.

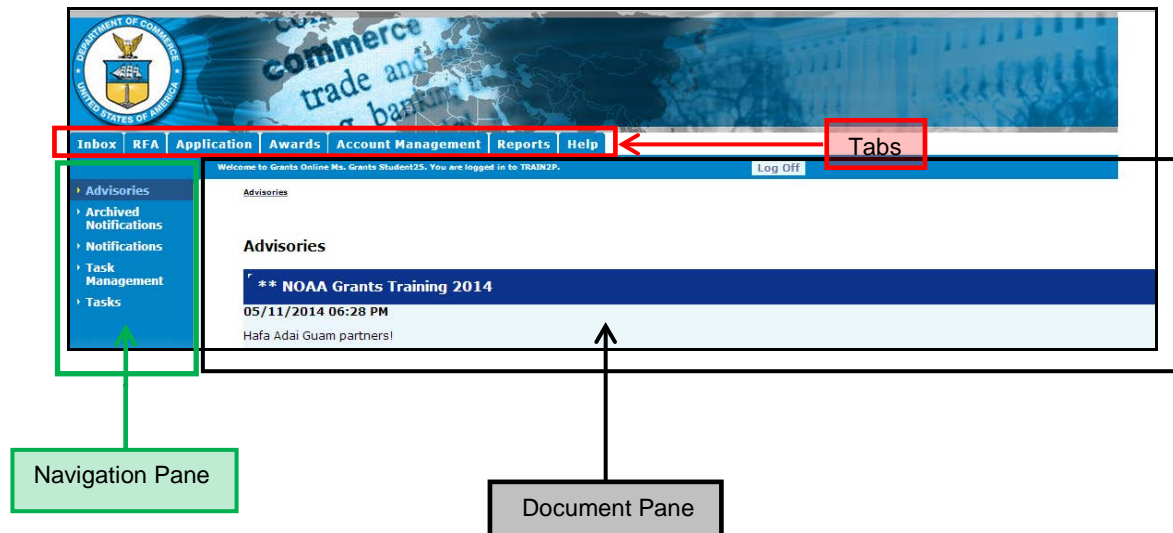
Grants Online Navigation Features

Access to most 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:

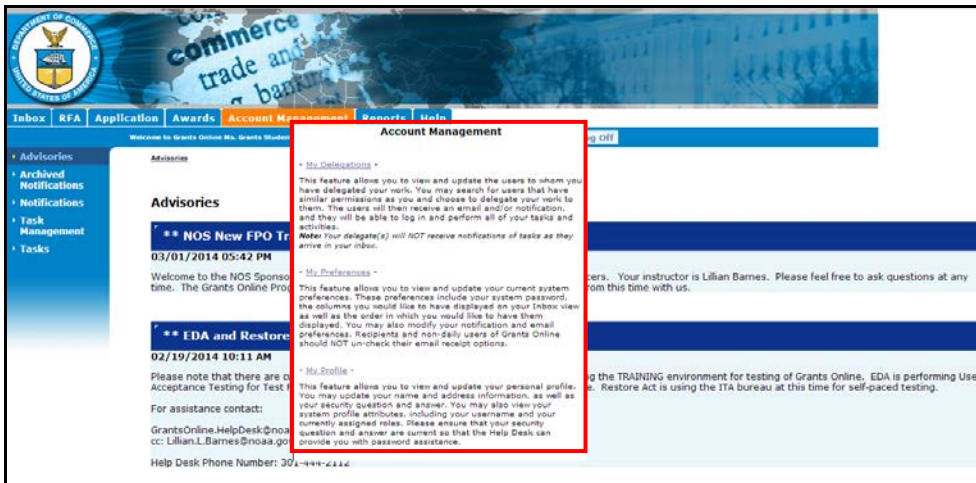
- **Tabs**: Highlighted by a red border at the top of the screen. Use the tabs to navigate to the different areas of Grants Online.
- **Navigation Pane**: Highlighted by a green border on the left-hand side of the screen. The options displayed in the navigation pane are determined by the active tab. 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.



User Interface Features

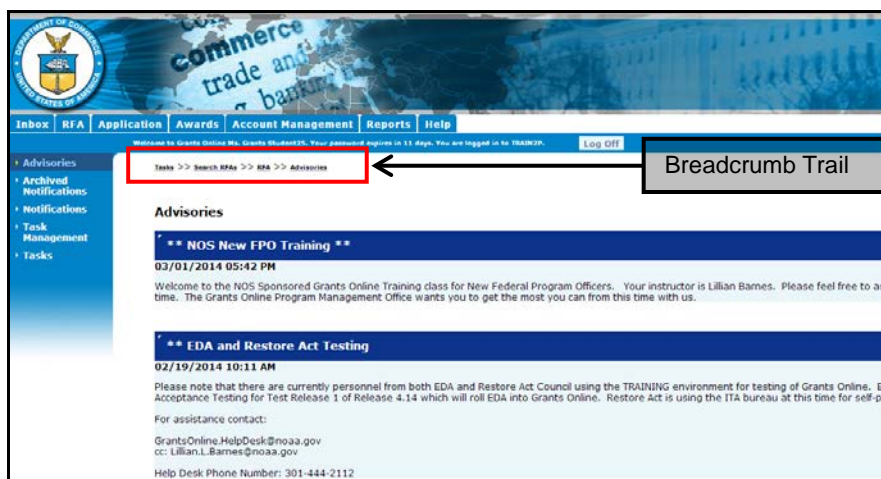
Pop-Up Short Cuts

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

When the user clicks the Help Tab, the following screen will display. The Help Desk contact information and hours of availability are displayed in the blue shaded box. To access Grants Online training, click the **Click here to access the Grants Online Training site** link at the bottom of the screen.



Welcome to Grants Online

To contact the Grants Online Help Desk, please call or email:
Toll free (Outside DC Metropolitan area): 1-877-662-2478
Local (DC Metropolitan area): 301-444-2112
Email: GrantsOnline.HelpDesk@noaa.gov
Hours: Monday-Friday, 8:00 am to 6:00 pm Eastern

NOTE: The Grants Online Security Policy prohibits sending passwords by email. For a password reset, call (or send an email with a phone number where you can be reached to) the Grants Online Help Desk.

Grants Online Help Desk personnel do not have Grants.gov expertise. For Grants.gov questions, please call the Grants.gov Help Desk at 1-800-518-4726.

Additional content will be added to this page soon. Meanwhile,

[Click here to access the Grants Online Training site](#)

[Click here to access the Grants Online Overview](#)

[Click here to access the Grants Online Glossary](#)

Inbox Tab

Tasks

Email notifications alert the user to an action or task s/he must complete. When the user selects a task, s/he has the opportunity to complete the action that has 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 Mr. Grants Bhudn25. You are logged in to TRAINIP. Log Off

Advisories >> Tasks

Your Tasks

Document Type: All Status: Open 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
View	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	
View	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	
View	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.

Archived Notifications

Notifications

Task Management

Tasks

Your Tasks

Document Type

Status

All

Open

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
<div>View</div>	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	
<div>View</div>	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	
<div>View</div>	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
<div>View</div>	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571076	Review Release of Funds	Not Started	Award File	2259283	

Filter a Task

1. Select 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: RFA
Status: Open
Apply Filter >>

4. The **Your Tasks** screen shows only the filtered tasks. In this example, only the Open (In Progress) RFAs are visible.

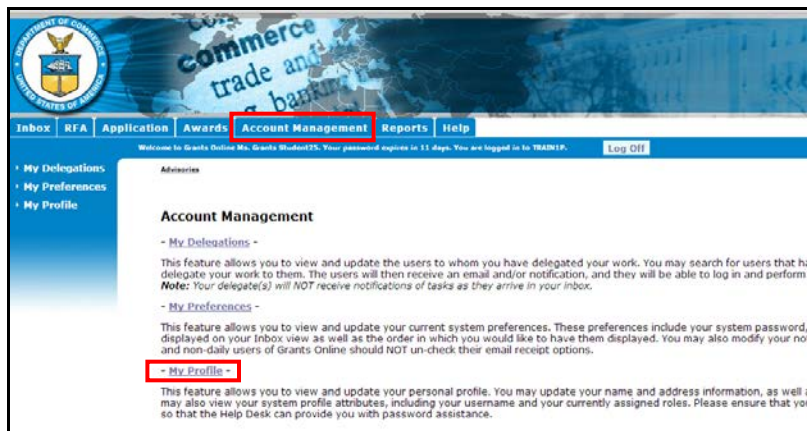
<div> <div>Your Tasks</div> <div> Document Type: RFA Status: Open Apply Filter >> </div> </div>										
4 items found, displaying all items.1										
View	RFA Id	RFA Name	RFA Type	Task Id	Task Name	Task Status	Document Type	EFO Id	Document Id	
View	2259009	Student25_080414_Universal	N	2569643	Notify Recipients	In Progress	RFA		2259009	
View	2256808	test 0508	N	2564265	Notify Recipients	In Progress	RFA		2256808	
View	2256757	Universal RFA 042914	N	2556044	Notify Recipients	In Progress	RFA		2256757	
View	2256176	Great Day For FPO Training (GDFFT)	N	2553586	Notify Recipients	In Progress	RFA		2256176	

Account Management Tab

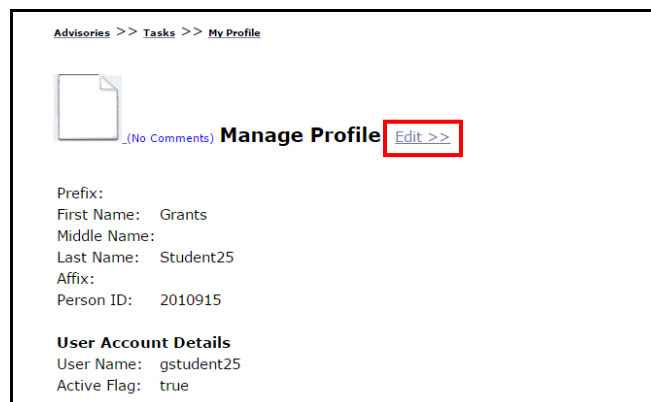
The Account Management Tab allows the user to view and update his/her profile; customize his/her notifications and task preferences; and delegate his/her Inbox to other users.

Manage the User Profile

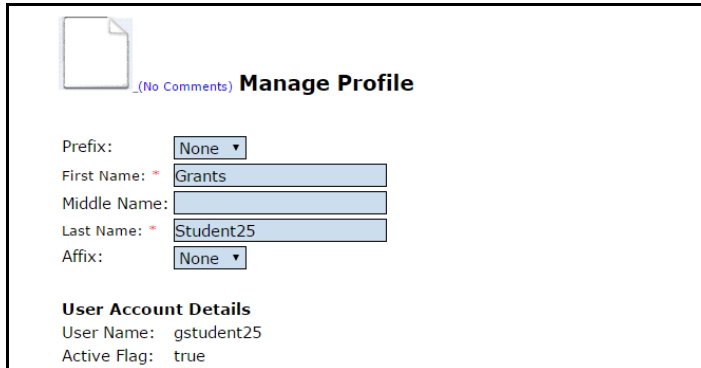
1. On the Account Management Tab, click the **My Profile** link.




2. The Manage Profile screen is visible. Click the **Edit** link.



- The user is presented with a screen on which s/he can modify his/her identifying account information. The variables First Name* and Last Name* are mandatory data entry fields.



 [\(No Comments\)](#) **Manage Profile**

Prefix:

First Name: *

Middle Name:

Last Name: *

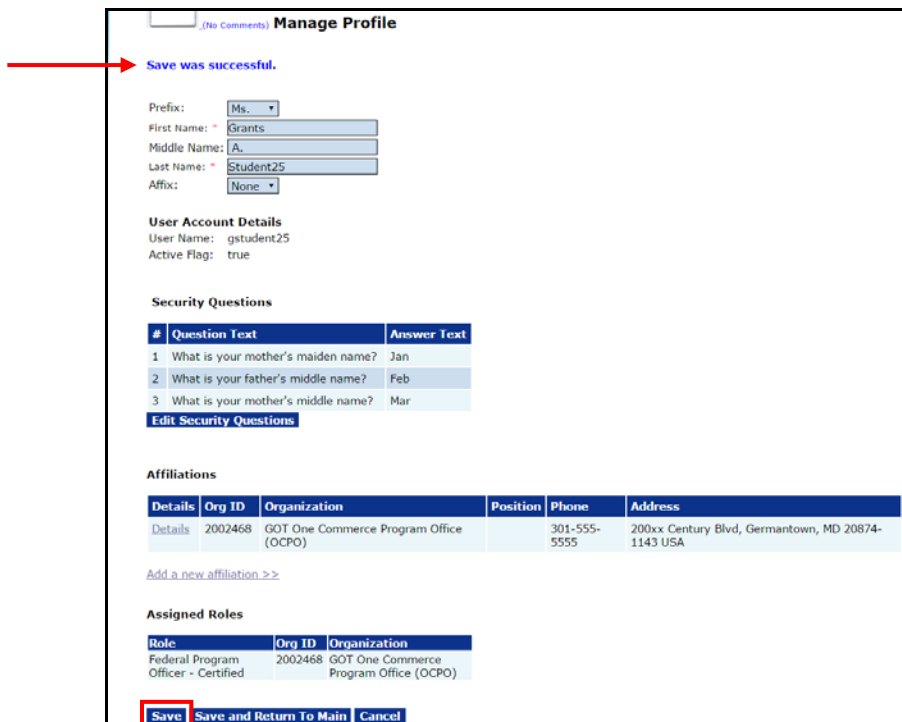
Affix:


User Account Details

User Name: gstudent25

Active Flag: true

- Scroll to the bottom of the screen and click the **Save** button. An indicator that data was saved is accompanied by the message “**Save was Successful**” and is displayed at the top left-hand corner of the screen. Although not required, it is strongly suggested that the user click the **Save** button after each modification.



 [\(No Comments\)](#) **Manage Profile**

Save was successful.

Prefix:

First Name: *

Middle Name:

Last Name: *

Affix:

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](#)

Affiliations

Details	Org ID	Organization	Position	Phone	Address
Details	2002468	GOT One Commerce Program Office (OCPO)		301-555-5555	200xx Century Blvd, Germantown, MD 20874-1143 USA

[Add a new affiliation >>](#)

Assigned Roles

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

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

5. The Security Questions section displays the current questions and corresponding answers. Initially, when a user logs into Grants Online s/he must specify this information. To change or update the questions, click the **Edit Security Questions** button.

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](#)

6. From the screen displayed below, the user can modify his/her questions and answers. Click the **Save** button and updates are confirmed with the message “**Security questions saved successfully.**” Subsequently, the user must click the **Save and Continue** button. If the user opts to just click the **Save and Continue** button, changes are saved but the message does not display.

Security Questions

Security questions saved successfully.

- All questions must be answered
- No two questions can be the same
- No two answers can be the same
- Each answer must be at least 3 characters long
- Each answer may only contain alphanumeric characters, the "-", or the "/" characters

Security Question 1 :

Answer :

Security Question 2 :

Answer :

Security Question 3 :

Answer :

[Save](#) [Save and Continue](#)

NOTE : You will be able to reset your own password in the future if you can answer all 3 security questions with exactly the same answers that you provide here.

7. To reset his/her password, the user must provide the correct responses to all security questions. If the user contacts the Help Desk for assistance with a password reset, s/he must provide an accurate response to all security questions. This assures the Help Desk that the user has the right to access the Grants Online account.
8. To update his/her affiliations, the user should click the **Details** link under the Affiliations header.

Affiliations					
Details	Org ID	Organization	Position	Phone	E-Mail
Details	2002468	GOT One Commerce Program Office (OCPO)		301-555-5555	200xx Century Blvd, Germantown, MD 20874-1143 USA testemail@msg2.rdc.noaa.gov

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

The screenshot shows a web form titled "Affiliation" with a red box around the "Edit >>" link. The form contains the following fields and values:

Organization	GOT One Commerce Program Office (OCPO)
Primary Flag	true
Active Flag	true * Primary affiliation must be active.
Title	
Street Address	20020 Century Blvd
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	

At the bottom left, there is a "Cancel" button.

10. As per convention, the data fields with a red asterisk require data. Make the necessary changes and click the **Save** button. If the user opts to click the **Cancel** button, changes are not saved.

The screenshot shows the same "Affiliation" form, but now in "View" mode. The "View >>" link is visible. Fields with a red asterisk (*) indicate required data. The "Save" button at the bottom left is highlighted with a red box.

Organization	GOT One Commerce Program Office (OCPO)		
Primary Flag	true		
Active Flag	true * Primary affiliation must be active.		
Title			
Street Address *	20020 Century Blvd		
City *	Germantown		
State *	MD		
Zip *	20874-1143		
Country *	USA		
Mail Route			
Phone Number *	301-555-1212	Extension	
Alternate Phone Number		Extension	
Fax Number			
E-Mail *	testemail@msg2.rdc.noaa.gov		
Alternate E-Mail			

Buttons: Save, Cancel



NOTE: If a NOAA user wishes to change his/her Organization, s/he must contact his/her Grants Management Advisory Council (GMAC) representative. That person will contact the Help Desk on behalf of the user.

Users from other bureaus should contact the appropriate person in their organization to modify this information.

11. The final section on the Manage Profile screen cannot be modified without the involvement of GMAC and the Grants Online Help Desk.

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

[Done](#)

12. 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
Details	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)

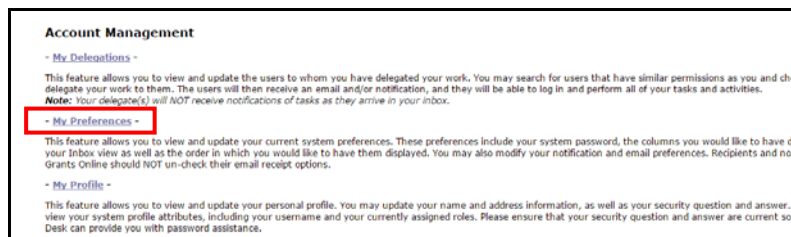
[Done](#)

User Preferences

The user may customize his/her viewing preferences 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.



2. On the screen shown below, the user can customize the page size, number of breadcrumbs, the look and feel, and the workflow warning.

The screenshot shows the 'User Preferences' form under the 'Site Preferences' tab. It contains four settings, each with a dropdown menu and a '+/-' button: 'Page Size' (set to 100), 'Number of Bread Crumbs' (set to 20), 'Look and Feel' (set to DOC), and 'Workflow Warning' (set to Yes).

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

The screenshot shows two sections: 'Award Tasks' and 'Post Award Tasks'. Each section has 'Available Columns' and 'Selected Columns' lists. In the 'Award Tasks' section, the 'Available Columns' list includes Project Title, Proposal Number, Total Federal Funding, Approved Federal Funding, Applicant Name, Task Received Date, and Award Start Date. The 'Selected Columns' list includes Task Id, Task Name, Award Number, Status, Document Id, Document Type, Start Date, and Completed Date. In the 'Post Award Tasks' section, the 'Available Columns' list is the same, and the 'Selected Columns' list includes Task Name, Award Number, Task Status, Document Id, Document Type, Start Date, and Completed Date. At the bottom of the screen, the 'Save' button is highlighted with a red rectangular box.

Customize Tasks

1. The user can modify his/her notifications using the checkboxes in the Email Inbox column (under the “Notification Preferences” section – top portion of the image below). Any 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 make modifications, click the **Tasks 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.

Notification Preferences

	Grants Online Inbox	Email Inbox
System Generated Advisories		
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"/>
System Generated Workflow		
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"/>
System Generated Notices		
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
 ----- Please select an inbox column -----
 Project Title
 Proposal Number
 Total Federal Funding
 Approved Federal Funding
 Award Start Date
 Competition Name

Selected Columns
 ----- Please select an inbox column -----
 Award Number
 RFA Name
 Task Received Date
 Applicant Name
 Task Id
 Task Name
 Task Status
 Document Type
 Document Id
 Start Date
 Completed Date

>>
 <<

Up
 Down

3. For the **Task Preferences**, use the Push [**>>**] and Pull [**<<**] functionality to specify the columns that will display on the Tasks portion of the screen.
4. For the **Task Preferences**, use the Up **Up** or Down **Down** buttons to select the column order that should display on the Tasks portion of the screen.
5. Click the **Save** button at the bottom of the screen. The user has to scroll to the bottom of the screen to see the **Save** button.

Post Award Tasks

Available Columns
 ----- Please select an inbox column -----
 Project Title
 Proposal Number
 Total Federal Funding
 Approved Federal Funding
 Applicant Name
 Task Received Date
 Award Start Date

Selected Columns
 ----- Please select an inbox column -----
 Task Id
 Task Name
 Award Number
 Task Status
 Document Id
 Document Type
 Start Date
 Completed Date

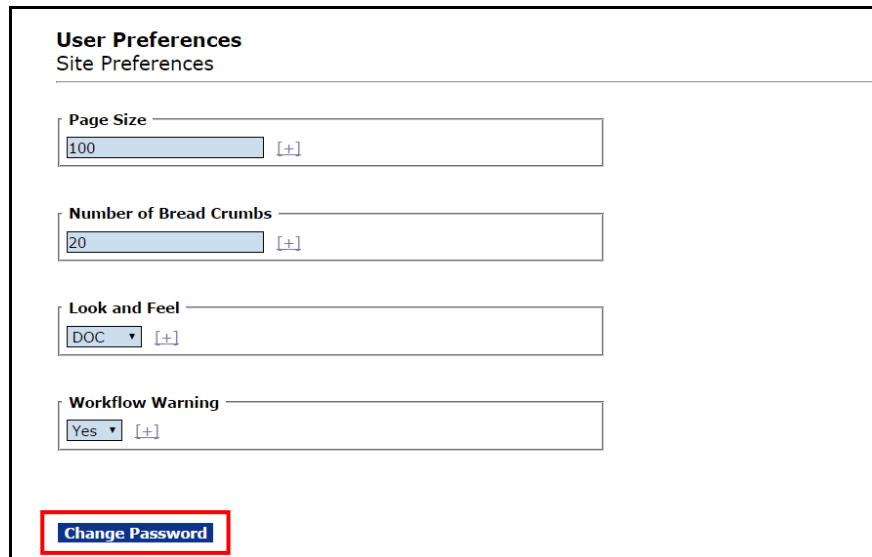
>>
 <<

Up
 Down

Save

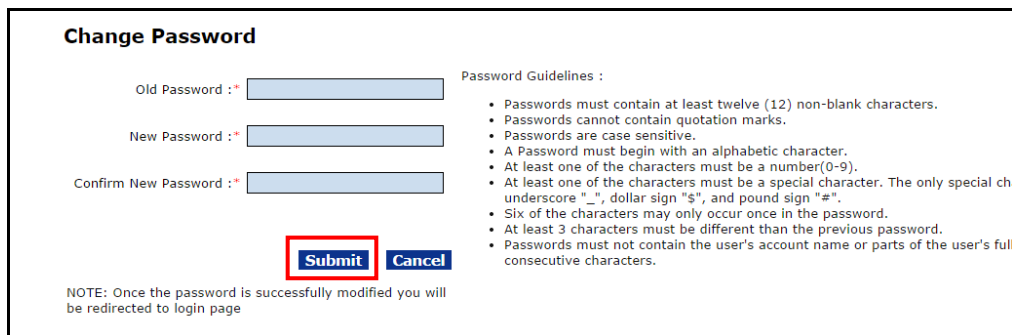
Change the Password

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



The screenshot shows the 'User Preferences' screen with a sub-header 'Site Preferences'. There are four settings sections: 'Page Size' with a value of 100 and a '[+]' button; 'Number of Bread Crumbs' with a value of 20 and a '[+]' button; 'Look and Feel' with a dropdown menu set to 'DOC' and a '[+]' button; and 'Workflow Warning' with a dropdown menu set to 'Yes' and a '[+]' button. At the bottom left, a blue button labeled 'Change Password' 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' screen. It has three input fields: 'Old Password : *', 'New Password : *', and 'Confirm New Password : *'. To the right of these fields is a 'Password Guidelines :' section with a bulleted list of rules. At the bottom, there are two buttons: 'Submit' and 'Cancel'. The 'Submit' button is highlighted with a red rectangular box. Below the buttons, a note 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 name.



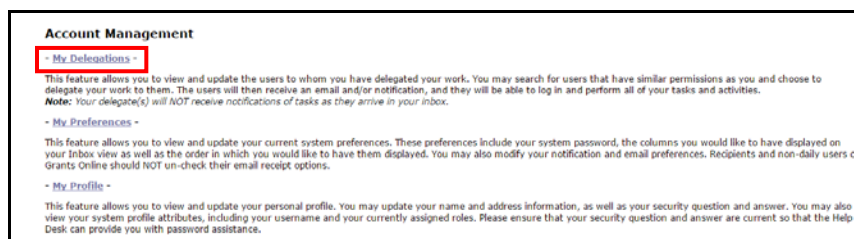
NOTE: Follow the Password Guidelines as detailed on the upper right-hand side of the screen. **ONLY** the following special characters are valid: underscore “_”, dollar sign “\$”, and pound sign “#”.

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.



2. The Delegate Authority screen is visible.

The screenshot shows the 'Delegate Authority' screen. It displays the message 'You currently have no peers on your list of delegates'. Below this, there is a 'Search for Peers' section with a note: 'Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.' The search fields include: 'First Name:', 'Last Name:', 'Organization:', and 'Role:'. The 'Role:' dropdown menu is open, showing a list of roles: 'AGO', 'ASAP Authorizer', 'Award Mailer', and '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:

AGO
ASAP Authorizer
Award Mailer
Budget Officer

Find Peers

3. When the search results are returned, choose the user 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:

AGO
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 Offic

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:

Find Peers

Rescind a Delegation

- From the Account Management Tab, click the **My Delegations** link.

Account Management

My Delegations

This feature allows you to view and update the users to whom you have delegated your work. You may search for users that have similar permissions as you and choose to delegate your work to them. The users will then receive an email and/or notification, and they will be able to log in and perform all of your tasks and activities.
Note: Your delegate(s) will NOT receive notifications of tasks as they arrive in your inbox.

My Preferences

This feature allows you to view and update your current system preferences. These preferences include your system password, the columns you would like to have displayed on your Inbox view as well as the order in which you would like to have them displayed. You may also modify your notification and email preferences. Recipients and non-daily users of Grants Online should NOT un-check their email receipt options.

My Profile

This feature allows you to view and update your personal profile. You may update your name and address information, as well as your security question and answer. You may also view your system profile attributes, including your username and your currently assigned roles. Please ensure that your security question and answer are current so that the Help Desk can provide you with password assistance.

- 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.
- 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
Rescind			Grants Student00	301-555-1212	testemail@msg2.rdc.noaa.gov			GOT One Commerce Program Offic

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:

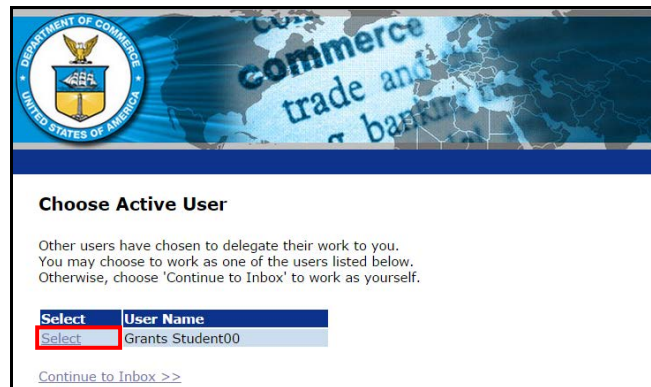
Find Peers

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

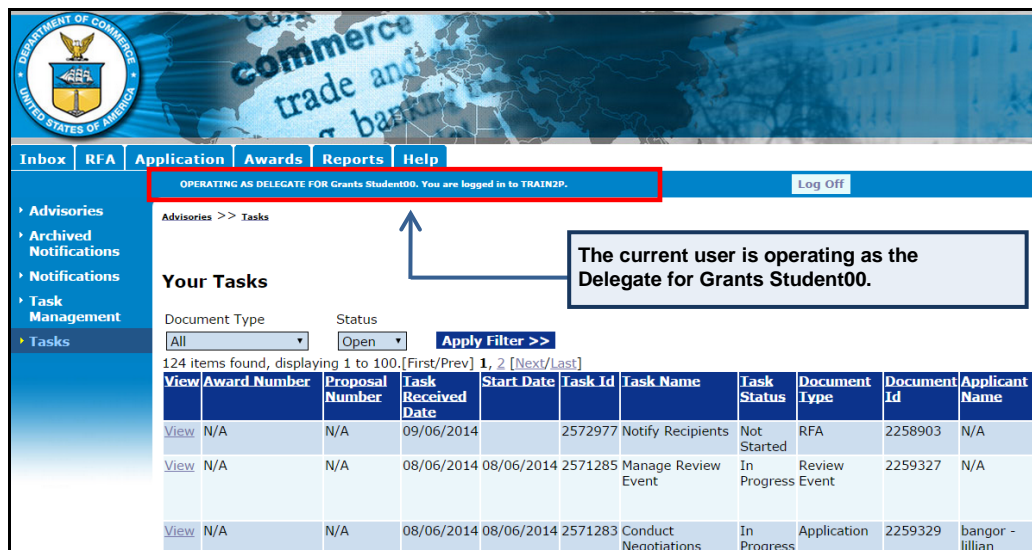
Other users have chosen to delegate their work to you.
You may choose to work as one of the users listed below.
Otherwise, choose 'Continue to Inbox' to work as yourself.

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
View	N/A	N/A	09/06/2014		2572977	Notify Recipients	Not Started	RFA	2258903	N/A
View	N/A	N/A	08/06/2014	08/06/2014	2571285	Manage Review Event	In Progress	Review Event	2259327	N/A
View	N/A	N/A	08/06/2014	08/06/2014	2571283	Conduct Negotiations	In Progress	Application	2259329	bangor - lillian



Grants Online Training

Universal RFA Creation & Application Processing

November 2016

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:

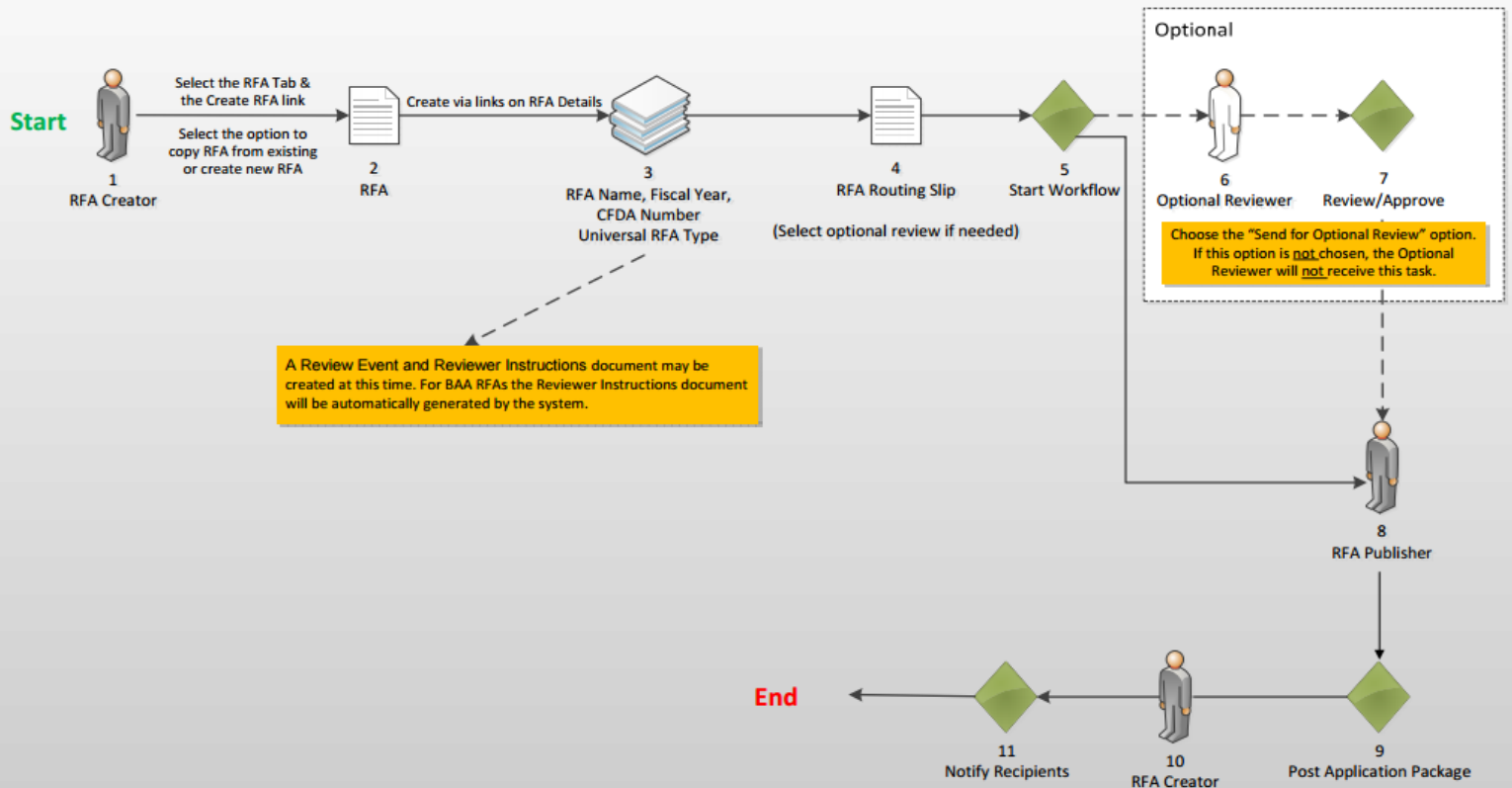
1. The Assigned Program Officer for the RFA must be a “Certified FPO” to advance documents to the next step in the workflow process.
2. For both Universal and Competitive RFAs the user should know the person(s) in his/her Program Office who will receive the application(s) for the initial Minimum Requirements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

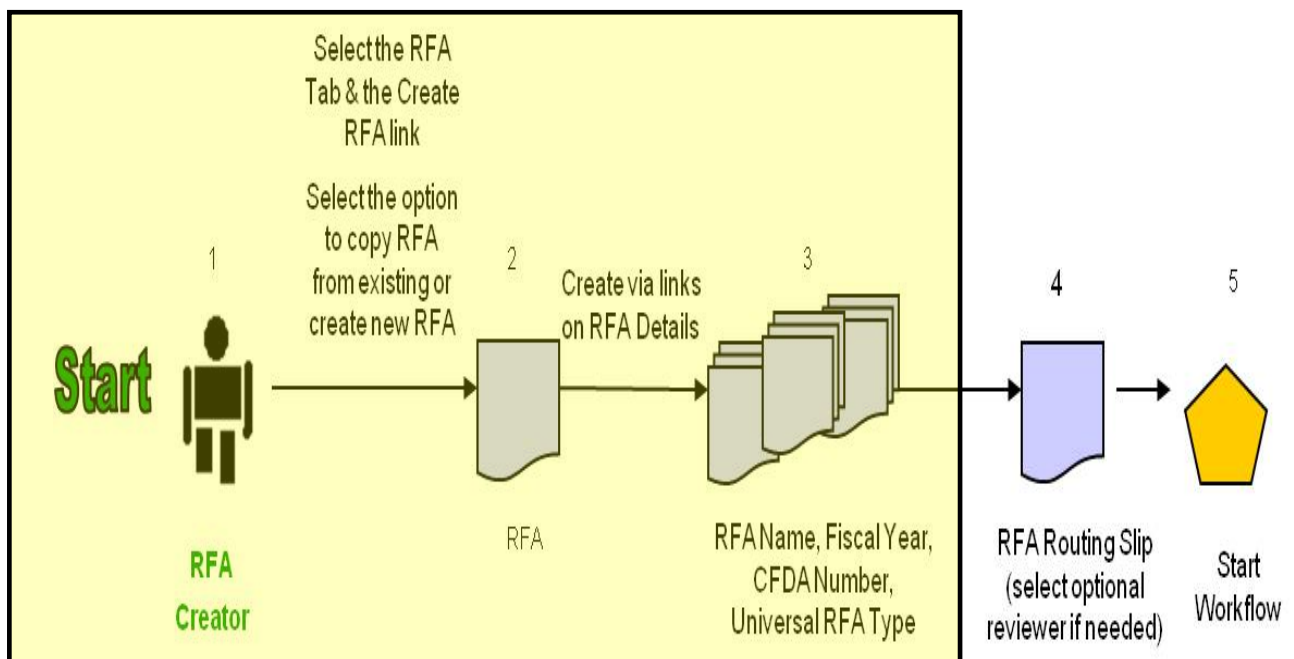
Universal Process – RFA Creation

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

June 1, 2016

Version 4.19





RFA Details

RFA Header Information

Document ID: 2595041

RFA Name *: Universal RFA

Fiscal Year *: 2016 (YYYY)

Announcement Type: I

Funding Opportunity Number: NOAA-GOT-OCPO-NOAA-2016-2004904

Line Office: Grants Online Training (GOT-NOAA)

Assigned Program Office *: One Commerce Program Office (OCPO-NOAA)

Assigned Program Officer *: Student00, Grant

CFDA Number *: 11.998 - Grants Online TRAINING

SubProgram: -Select a Sub Program

RFA Type *: Noncompetitive

RFA Additional Information

Anticipated Funding Amount for All Recipients *: \$

Application Due Date *: (MM/DD/YYYY)

Anticipated Award Date (MM/DD/YYYY)

Selected Federal Addresses *

No addresses have been selected.

[View/Edit](#)

Selected Federal Contacts *

No contacts have been selected.

[View/Edit](#)

Recipient Information/Application Details

[Add New](#)

Search Addresses

Program Office Name:

Street Address:

City:

State: Please select a state

Zip:

[Search](#)

Search Results

Nothing found to display.

[Add to RFA](#)

Selected Addresses for this RFA

One item found. 1

Program Office Name	Address
GOT One Commerce Program Office (OCPO)	20020 Century Blvd, Germantown, MD 208

[Remove from RFA](#)

[Done](#)

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.

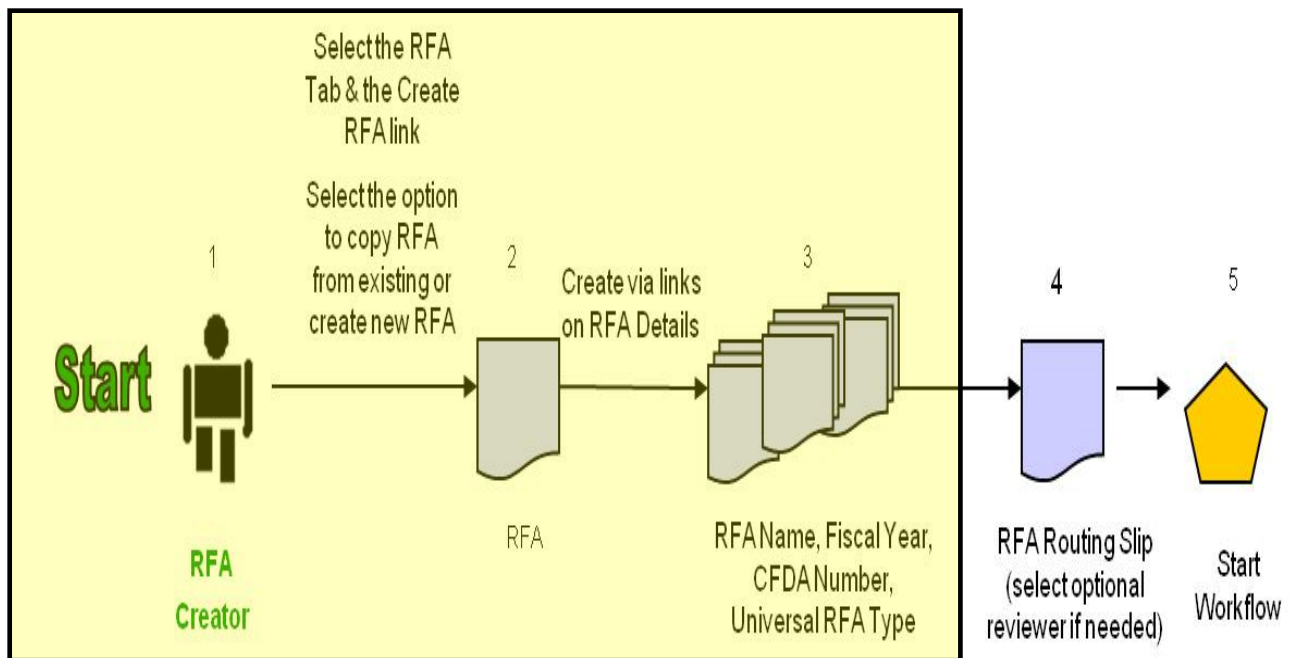
Add new Attachment: [+](#)

Any changes to information on this page should be saved before adding or removing attachments.

[Large File Guidance](#)

[Save](#) [RFA Routing Slip - Start Workflow](#) [Cancel](#)

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



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.

Save **Cancel/Done**

Matching Requirement

Statutory Authority : *

Minimum Cost Share (%) : *

Maximum Cost Share (%) : *

Save **Special Award Condition Details**

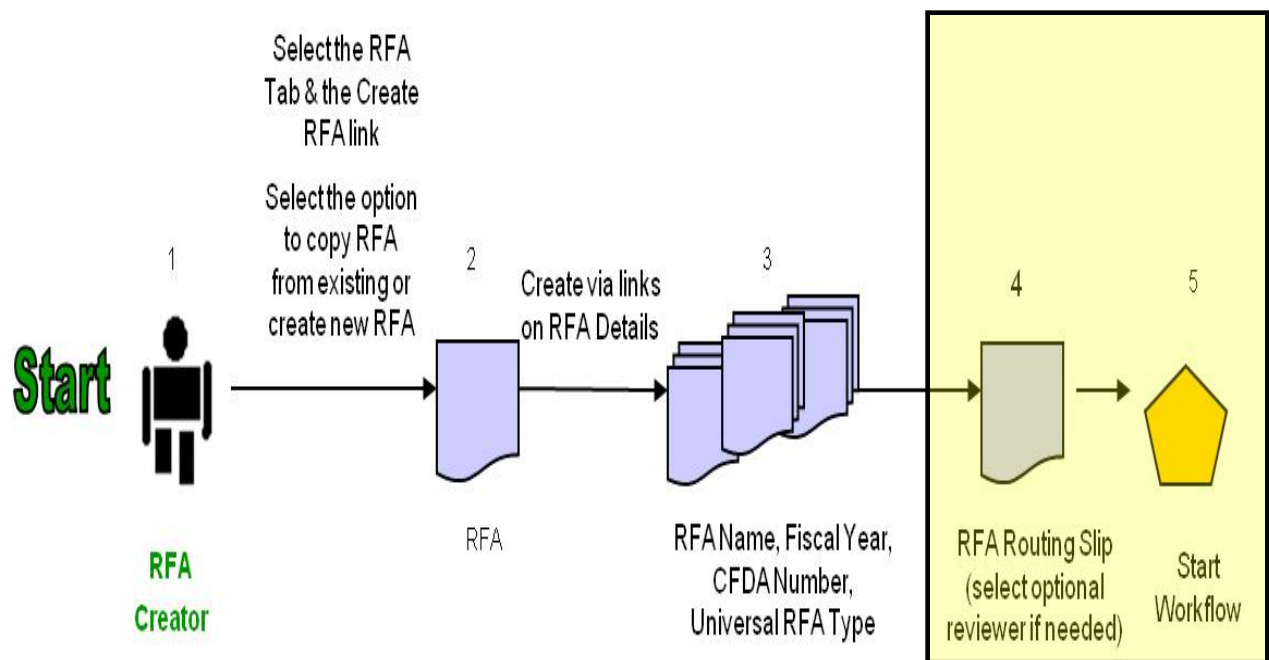
Name : *

Description : *

Spell Check

Save **Done** **Cancel**

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

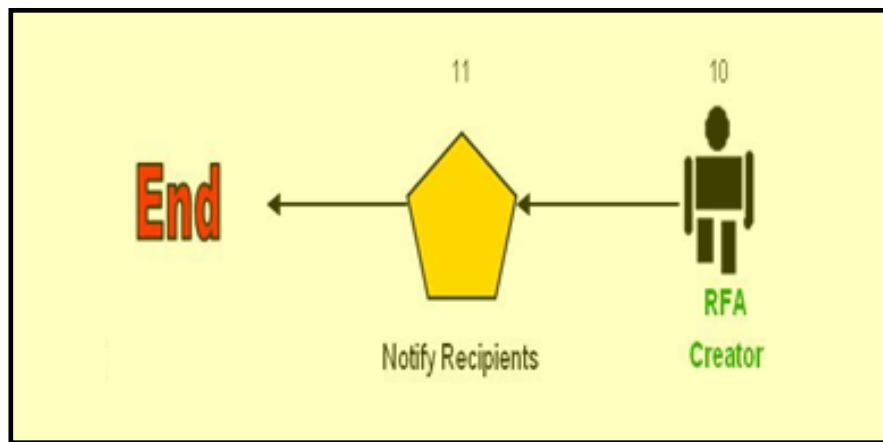
All RFA Publishers will receive a task to review this document. One RFA Publisher will claim ownership. This is the person who coordinates and publishes the Federal Register Notice and posts the FFO on Grants.gov for competitive announcements. This person also posts the application package at Grants.gov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

Participant Name
RFAPublisher

Save Route

Start Workflow

Cancel



Your Tasks

Document Type

All

Status

Open

Apply Filter >>

31 items found, displaying all items.1

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

RFA

Id: 2199733

Status: NotifyRecipients - Not Started

Action:

Please select an action

Submit

Please select an action

Your Comments:

Notify

View RFA Details

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 Applicant Email

From: GrantsOnLine.test@noaa.gov (GrantsOnLine.test@noaa.gov)
To: grant.applicant@gmail.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.

The Grants.gov URL is: <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 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 following 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: Generating Sample Notifications
Fiscal Year: 2015
CFDA Number: 11.999
Opportunity Number: NOAA-ONPO-2015-2001279
Agency: National Oceanic and Atmospheric Administration
Opening Date: 2014-12-10 10:54:01.0
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

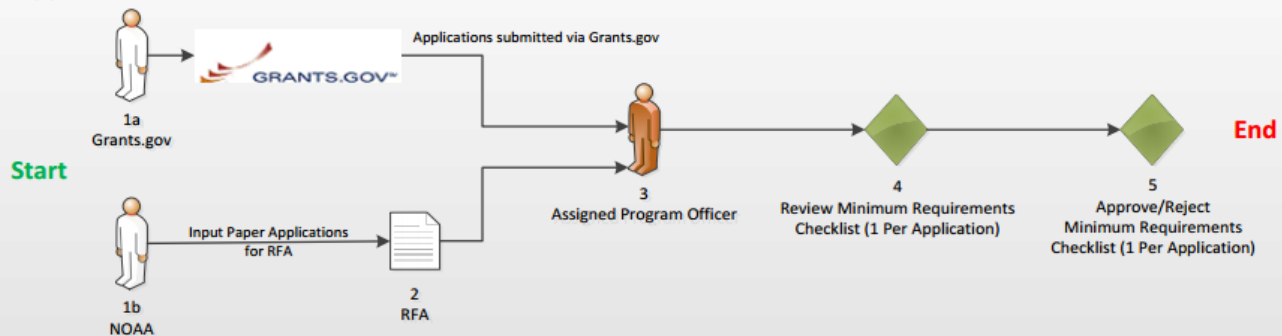
Universal Process – Applications and Review Event

Applications and Review Event Overview (UNI-2)

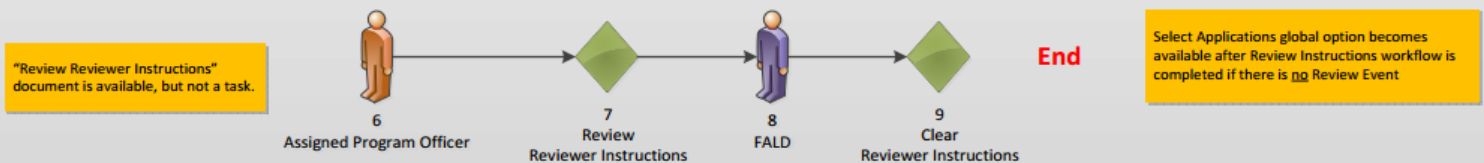
June 1, 2016

Version 4.19

Receive applications



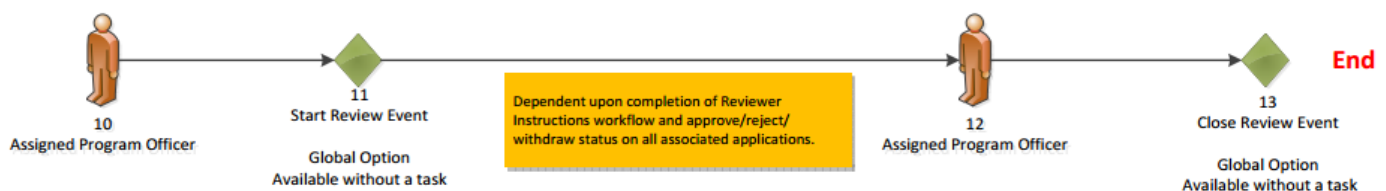
Review Reviewer Instructions



Review Event Workflow

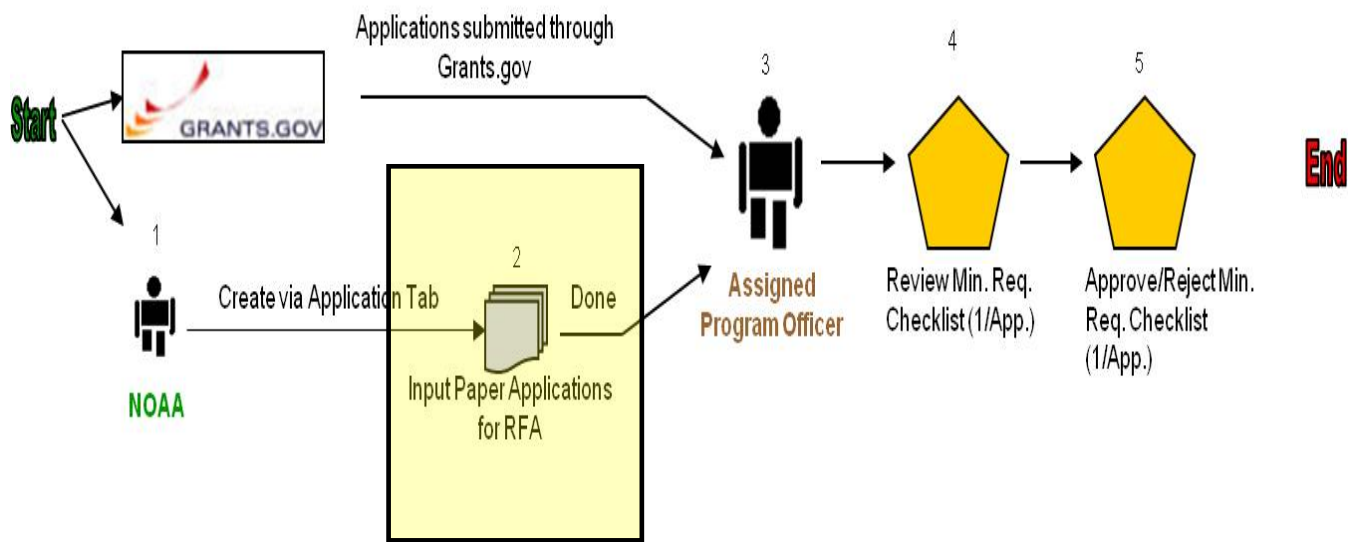
Only if Review Event Exists

- Review Events are optional in Grants Online.
- Review can be conducted using Grants Online functionality or outside of Grants Online



A Review Event is optional for the Universal process.

For further details of the Review Event and Reviewer processes, please reference **Pages 88 & 89** of this Training Manual.



Application Details - SF-424

Audit Trail:

Attachments:

[-] Program Office Added Information

Proposal Number:

Project Type: ☐ Construction ☒ Non-Construction ☐ Both

Principal Investigators-
Project Directors:

Keyword(s):

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

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): **-Select a Revision Type-**

Use format MM/DD/YYYY for date fields.

Project Start Date: * 10/01/2015 Project End Date: * 09/30/2019 Submitted Date:

State Received Date: Federal Agency Received Date: * 02/01/2015 Time: * 05:00

Applicant Identifier: State Application Identifier: Federal Identifier:

Applicant Information

Legal Name: * NonComp App

Department Name:

Division Name:

Duns Number: (9 or 13 digit number) EIN Number: (xx-xxxxxxx)

Street:

City: County:

State: * Maryland 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 Applicant1: * For-Profit Organization (Other than Small Business)

Type of Applicant2: Please Select Applicant Type

Type of Applicant3: Please Select Applicant Type

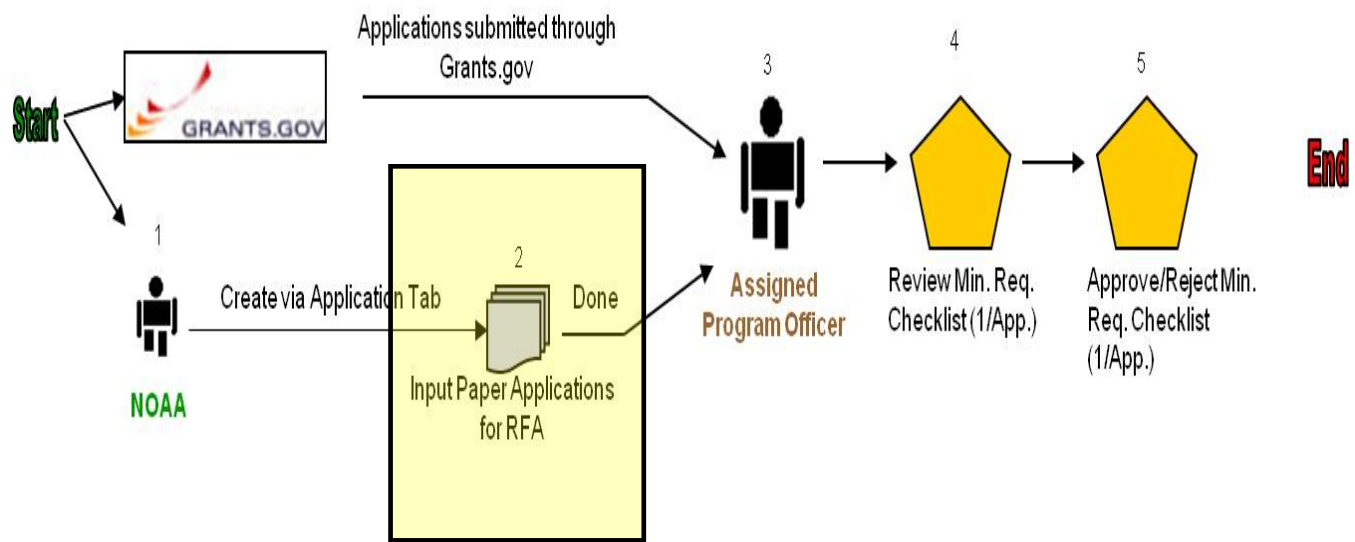
Descriptive Title of Applicant's Project: * Training App 1

Project Areas:

CFDA Number: * 11.413 - Fishery Products Inspection and Certification

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. The fields marked with an **asterisk** are required for the application processing to continue. Additionally, the **DUNS Number** should be entered if it is known.

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.



Name of Federal Agency:

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 12327 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:

Nothing found to display.

[Add New](#)

[Save as Draft](#) [Save and Start Workflow](#) [Cancel](#)

Add Application Funding Details

Application Total Funding : 500000

Fiscal Year : *
(use format YYYY)

Funding Start Date : * Funding End Date : *
(use format MM/DD/YYYY)

Federal Funding : * Program Income :

Applicant Funding :

State Funding :

Local Funding :

Other Funding :

Total Funding :

[Save](#) [Close](#)

Application Funding Details: *

Total Funding: *

Multi Year Award:

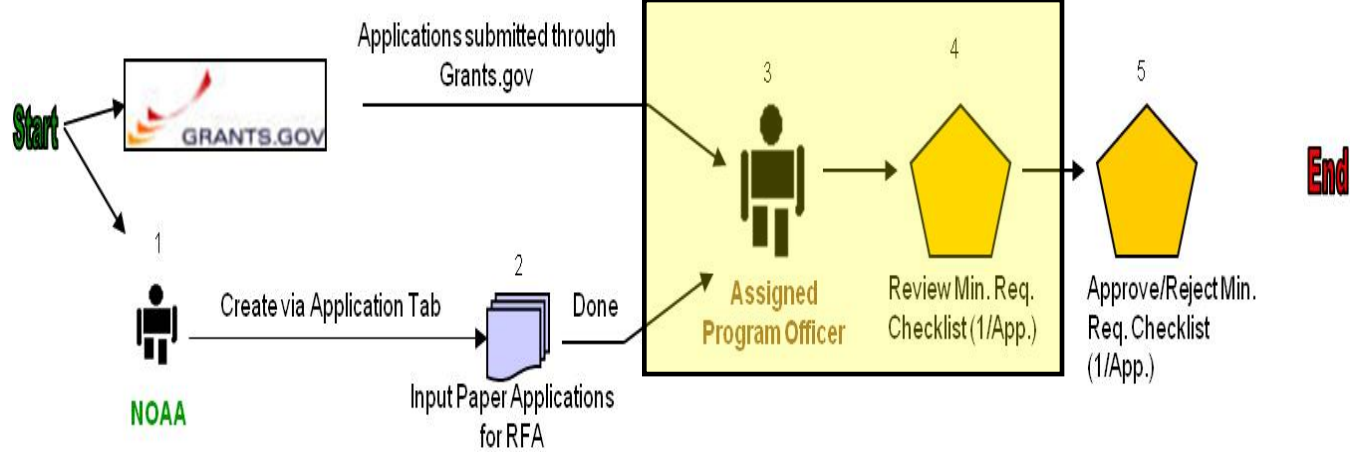
Fiscal Year	Start Date	End Date	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2016	10/01/2015	09/30/2019	\$500,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500,000.00	\$0.00	Edit	Delete

[Add New](#)

[Save as Draft](#) [Save and Start Workflow](#) [Cancel](#)

The Total Funding amount includes both Federal and matching funds.

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 only have one line of funding.



2 items found, displaying all items.1

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

Minimum Requirements Checklist

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

Overall Comments:

Spell Check

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

Save

Save and Return to Main

Cancel

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.

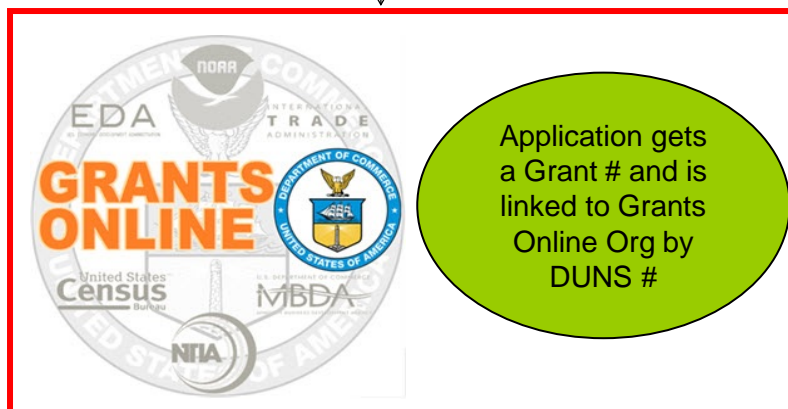


ASAP ID

US Department of
Commerce Business
Systems (CBS)

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

GRANT #,
DUNS #



GRANT #,
DUNS #



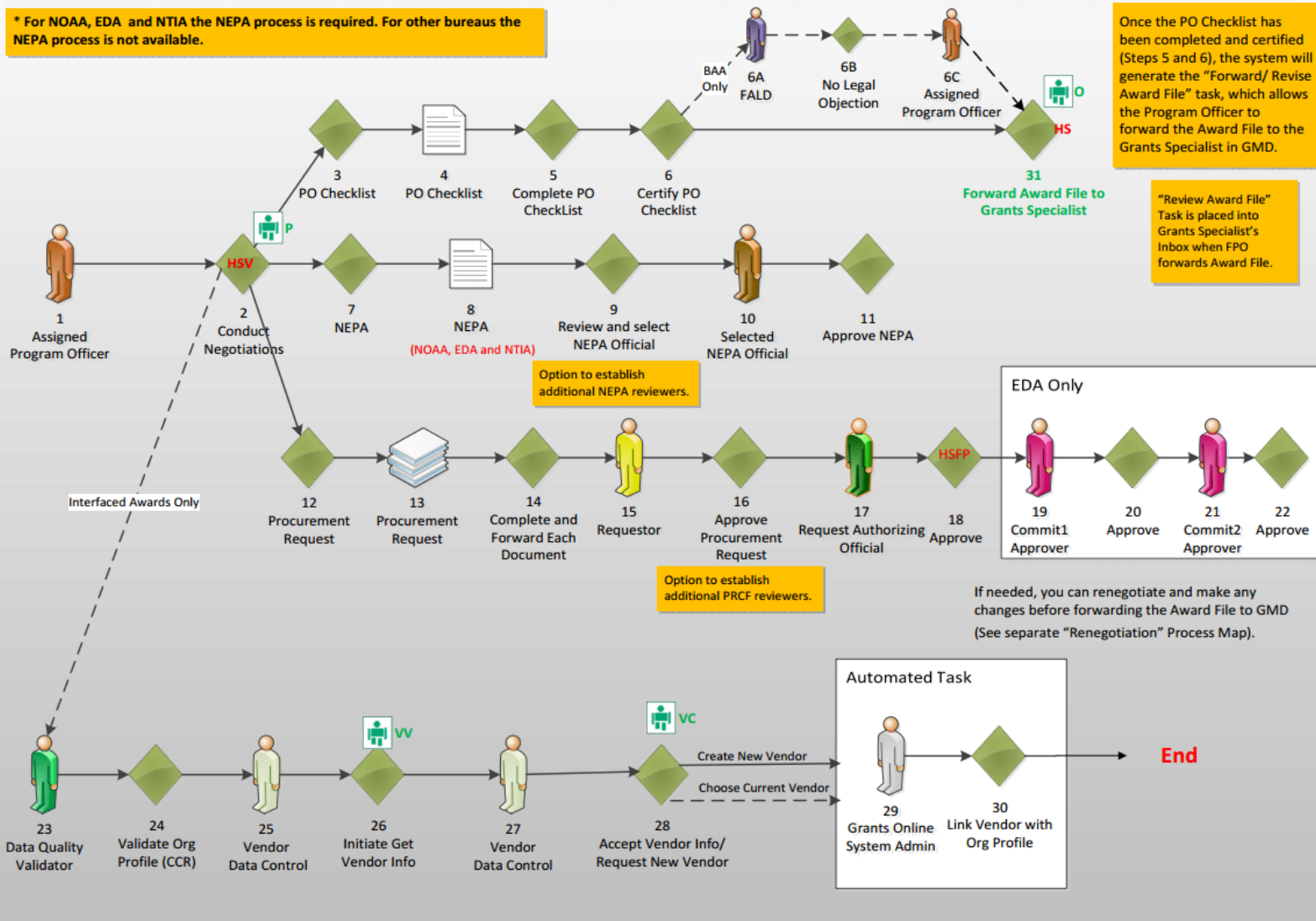
Universal Process – Prepare Applications for Funding

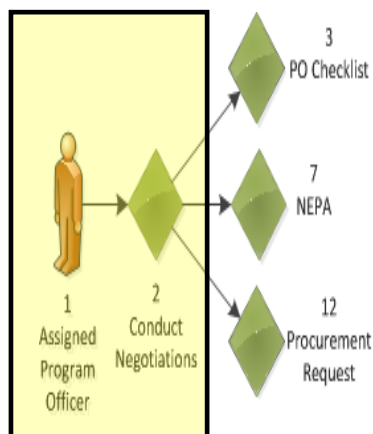
Prepare Applications for Funding Overview (UNI-3)

June 1, 2016

Version 4.19

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





33 items found, displaying all items.1

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

Scenario 1: DUNS Number is found in Grants Online

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](#)
This Applicant has been automatically assigned a Grants Online Organization based on unique DUNS number match.

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:

Step 1:

If the DUNS Number was entered on the application and the organization is found in Grants Online, a message in black bold text will be displayed that reads "This Applicant has been automatically assigned a Grants Online Organization based on unique DUNS number match."

Proceed to Step 2.

Scenario 2: DUNS Number was not entered on the Application but the Organization exists in Grants Online

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): [-Select a Revision Type-]

Use format MM/DD/YYYY for date fields.
 Project Start Date: * 10/01/2015 Project End Date: * 09/30/2019 Submitted Date:
 State Received Date: Federal Agency Received Date: * 02/01/2015 Time: * 05:00 [PM] Eastern
 Applicant Identifier: State Application Identifier: Federal Identifier:

Applicant Information
 Legal Name: * Bangor Publishing Company **Org Lookup**
 Department Name:
 Division Name:
 Duns Number: * (9 or 13 digit number) EIN Number: * (xx-xxxxxxx)
 Street:
 City: County:
 State: * Maine Province:
 Country: Zip:

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

Step 1:

a) If the DUNS Number was not entered a red message is displayed. Click the **Org Lookup** button to find the organization's record in the database or add if necessary.

Select Organization
 Enter your search criteria to find the organization.
 Organization Name:
 Address-City:
 DUNS Number: 001096643
 EIN Number:
 Address-State: Please select a state
 Search Cancel

[Add a new organization >>](#)

One item found.1

Select	Org ID	Name	Bureau	Address	DUNS	DUNS+EIN	Cage Code	ASAP Id	Active
Select	2002880	BANGOR PUBLISHING COMPANY	NOAA	491 MAIN ST, BANGOR, ME 04401-6296 USA	001096643	987654321			true

b) Enter the search criteria (enter DUNS Number if available). Click the **Search** button.

c) If the desired organization is found, click the **Select** link to associate the organization in Grants Online.

Scenario 3: DUNS Number was not found in Grants Online

Step 1:

a) If the DUNS Number was not found in Grants Online a red message is displayed. Click the **Org Lookup** button to find the organization's record in the database or add if necessary.

b) The DUNS Number will automatically be pre-populated in the field. Click the **Search** button.

c) If the desired organization is NOT found in Grants Online, click the **Add a new organization** link.

d) If the organization's record is in the SAM.gov file, click the **Select** link.

OR

e) Click the **Add a blank organization** to manually enter a new organization or individual recipient.

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: * 10/01/2015 Project End Date: * 09/30/2019 Submitted Date:
 State Received Date: Federal Agency Received Date: * 02/01/2015 Time: * 05:00 PM Eastern
 Applicant Identifier: State Application Identifier: Federal Identifier:

Applicant Information
 Legal Name: * Global Env and Tech Foundation **Org Lookup**
 Please Associate an Organization within Grants Online using the Org Lookup button.
 Department Name:
 Division Name:
 Duns Number: * 878128073 EIN Number: * (xx-xxxxxxx)
 (9 or 13 digit number)
 Street:
 City: County:
 State: * Virginia Province:
 Country: Zip:

Select Organization

No search results were found. Please change your criteria and search again.
 Enter your search criteria to find the organization.
 Organization Name
 Address-City
 DUNS Number 878128073
 EIN Number
 Address-State Please select a state
 Search Cancel
 Add a new organization >>
 Nothing found to display.

Select SAM Organization

One or more organizations matching your search criteria were found in the System for Award Management (SAM) database. Select a SAM organization to initialize the new organization from SAM data or select "Add a new blank organization" to create an organization that is not initialized from a SAM organization.

One item found.1

Select	Sam ID	Name	Address	DUNS	DUNS+EIN	Cage Code	Active
Select	46795	GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION	2900 S QUINCY ST STE 375, ARLINGTON, VA 22206-2231 USA	878128073	987654321	1DGJ8	true

Add a new blank organization >>

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). As a result of the Digital Accountability and Transparency Act (DATA Act), Grants Online now receives a daily extract from SAM.gov that will automatically update the Organization's profile in Grants Online.
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.

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 (9 digit number) 987654321 +4
EIN Number (xx-xxxxxxx) 123456789
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.

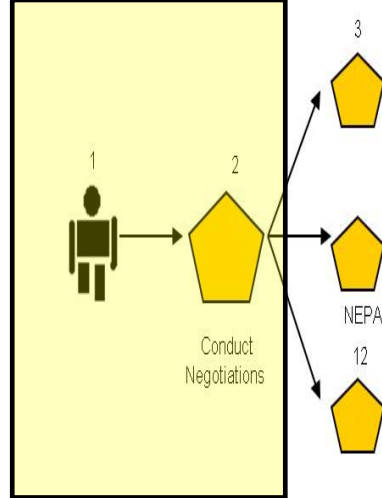
SAM Physical Address
Street Address * 1457 Main Street
City * Germantown
County
State * Maryland Zip * 20874
Country * United States
Phone * 301-123-9876

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. 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).



33 items found, displaying all items.1

View	Task Name	Award Number	Task Received Date	Document Type	Project Title	Task Status	Document Id	Task Id	Start Date	Completed Date	Applicant Name	Proposa Number
View	Conduct Negotiations	N/A	02/05/2011	Application	LB Universal2 RFA App	Not Started	2199761	1795527			icmr	LB Univ2 App
View	Notifur Recipients	N/A	02/05/2011	RFA	N/A	In	2100760	1705525	02/05/2011		N/A	N/A

[-] Program Office Added Information

Proposal Number:

Project Type: * ☐ Construction ☐ Non-Construction ☐ Both

Principal Investigators-
Project Directors:

Keyword(s):

Program Element /
Funding Priority:

Principal Place Of Performance :

[Search FIPS Data](#) [Guidance](#)

Step 2: Select Construction, Non-Construction or Both

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](#)

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

Award Number:

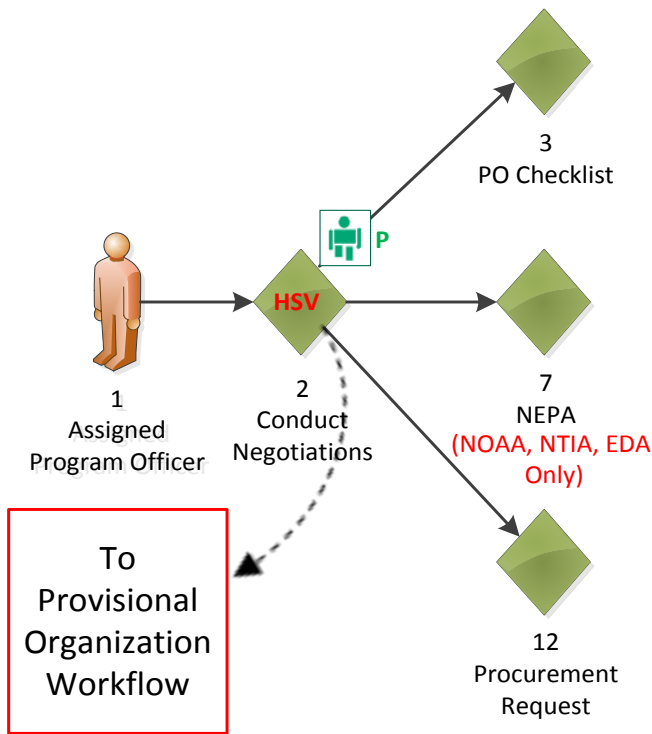
[Generate New Award Number](#)

[Associate with Existing Award](#)

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

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

We are currently working on a new award. When working on a continuation amendment, the user will only have the option to select an organization identified on the original award.



No Procurement Request for Zero Dollar Awards

To Provisional Organization Workflow

Award File In Progress - NA12GOT9990022

Id: 2245442
Status:

Action:

Your Comments:

Attachments:

Pending Actions X

5 items found, displaying all items. 1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status
PO Checklist	2245444	05/22/2012	\$5,000.00	2012	Complete PO Checklist: Not Started
NEPA	2245446	05/22/2012	\$5,000.00	2012	NEPA Document: Not Started
Procurement Request and Commitment of Funds	2245442	05/22/2012		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	Proposed Number
View	Procurement Request and Commitment of Funds	NA11GOT9990039	02/02/2011	Procurement Request and Commitment of Funds	Test/Training App 1 for Not Release 4.06 Comp RFA Started		2199722	1795342			Institute for Community Managed Resources (ICMR)	LB Test App 1
View	NEPA Document	NA11GOT9990039	02/02/2011	NEPA	Test/Training App 1 for In Release 4.06 Comp RFA Progress		2199724	1795341	02/02/2011		Institute for Community Managed Resources (ICMR)	LB Test App 1
View	Complete PO Checklist	NA11GOT9990039	02/02/2011	PO Checklist	Test/Training App 1 for Not Release 4.06 Comp RFA Started		2199723	1795340			Institute for Community Managed Resources (ICMR)	LB Test App 1
View	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

- 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 chooses **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 Training

Competitive RFA / FFO Creation

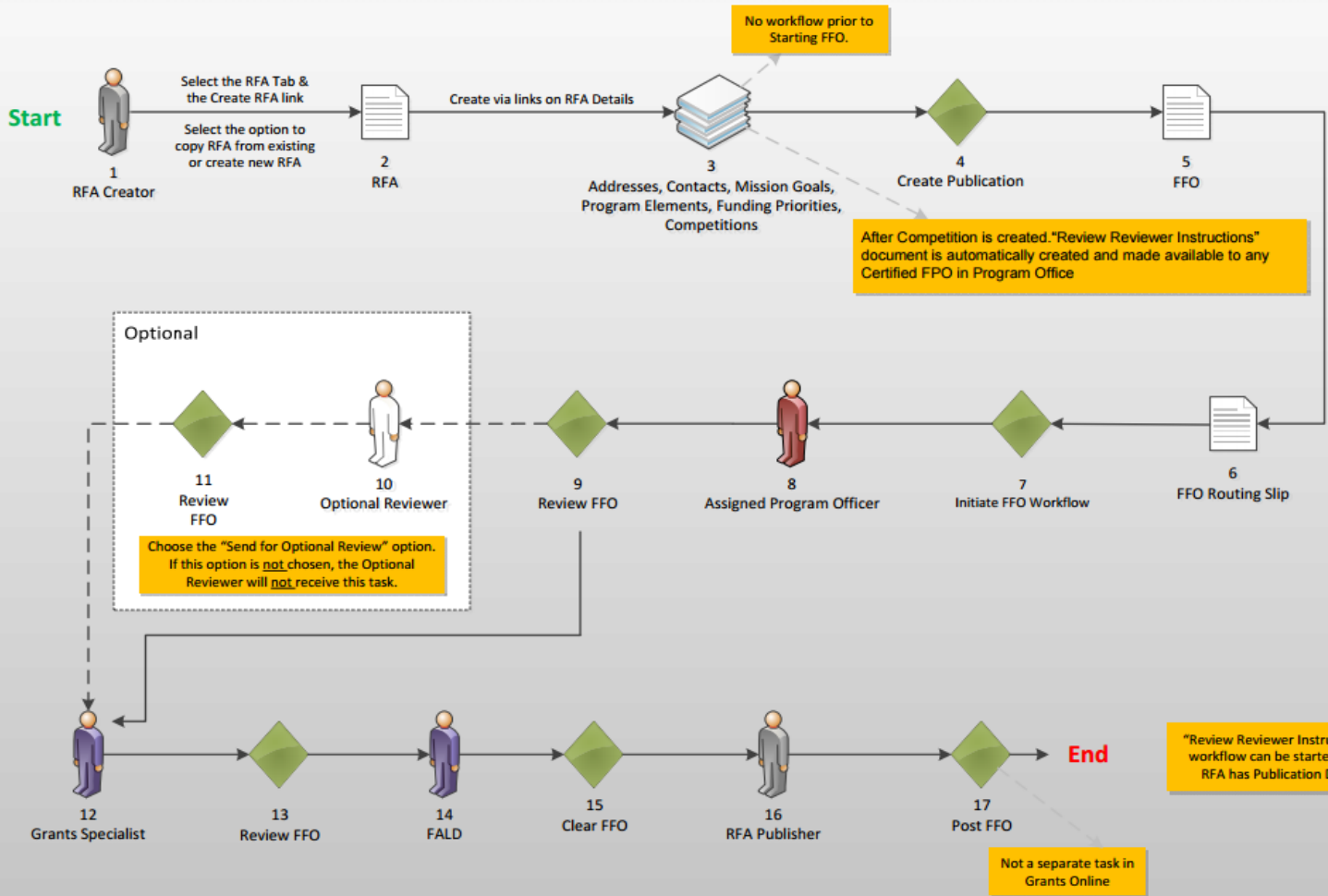
November 2016

Competitive Process – RFA Creation

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

June 1, 2016

Version 4.19



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

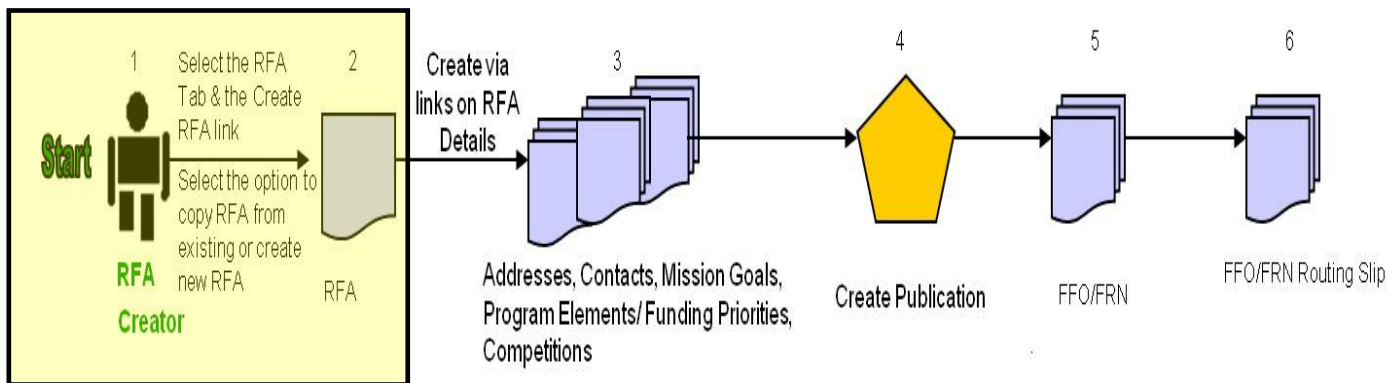
- Opportunity Number – *Federal Opportunity Number*
- Opportunity Title – *RFA Name*
- Opportunity Category – (Competitive RFA → *“Discretionary”*; Universal RFA → *“Other”*)
- Category Explanation – (If Opportunity Category is “Other”): *RFA Type*
- *CFDA Number*
- Posting Date – *Publication Date*
- 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 Header Information

Document ID 2147932

RFA Name* Sample RFA for FPO Training

Fiscal Year* (YYY) 2009

Announcement Type Initial

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

**** Competitive Only**

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

Line Office* NOAA Grants Online Training (GOT)

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

Assigned Program Officer* Student, NOAA ▼

CFDA Number* 11.499 - NOAA Grants Online Training ▼

Sub Program -Select a Sub Program- ▼

RFA Name*

Fiscal Year* (YYY)

Announcement Type Initial

Anticipated Publication Date* (MM/DD/YYYY)

**** Competitive Only**

Line Office*

Assigned Program Office* -Select a Program Office- ▼

Assigned Program Officer* -Select a Program Officer- ▼

CFDA Number* -Select a CFDA #- ▼

Sub Program -Select a Sub Program- ▼

Save Cancel

- 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.
- Choose **One Commerce Program Office (OCPO)** as the Assigned Program Office and the training instructor as the Assigned Program Officer. Choose 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”)

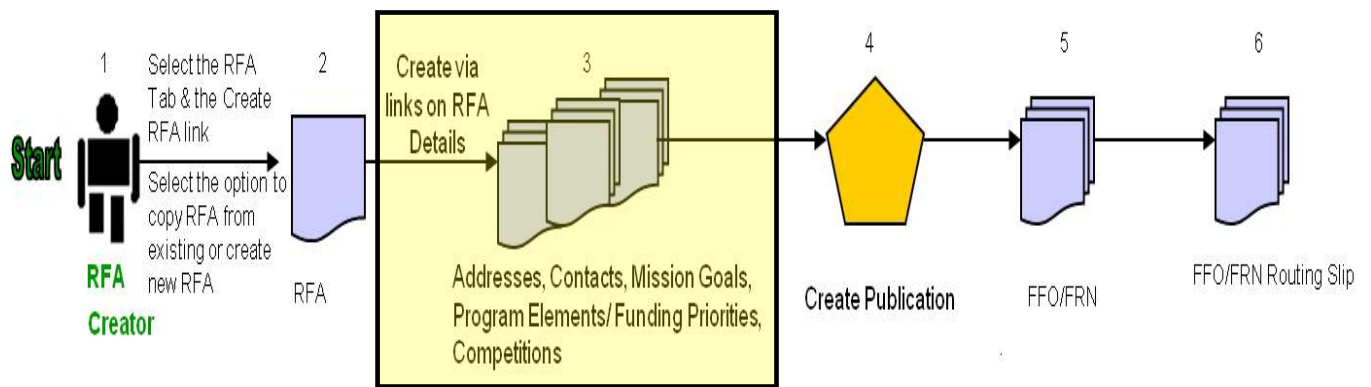
Second component – Line Office (for training – “GOT”)

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



RFA Supplementary Information

Anticipated Funding Amount * \$

Min

Max

Anticipated Award Amount* \$

Anticipated Number of Awards*

Selected Federal Addresses *

No addresses have been selected.

[Add/Edit](#)

Selected Federal Contacts *

No contacts have been selected.

[Add/Edit](#)

Selected Mission Goals *

No mission goals have been selected.

[Add/Edit](#)

Program Elements/Funding Priorities *

No Program Elements/Funding Priorities Available

[Add/Edit](#)

Competitions *

Press Save before selecting the following link(s)

No Competition

[Add New](#)

Search Addresses

Program Office Name:

Street Address:

City:

State:

Zip:

[Search](#)

Search Results

Nothing found to display.

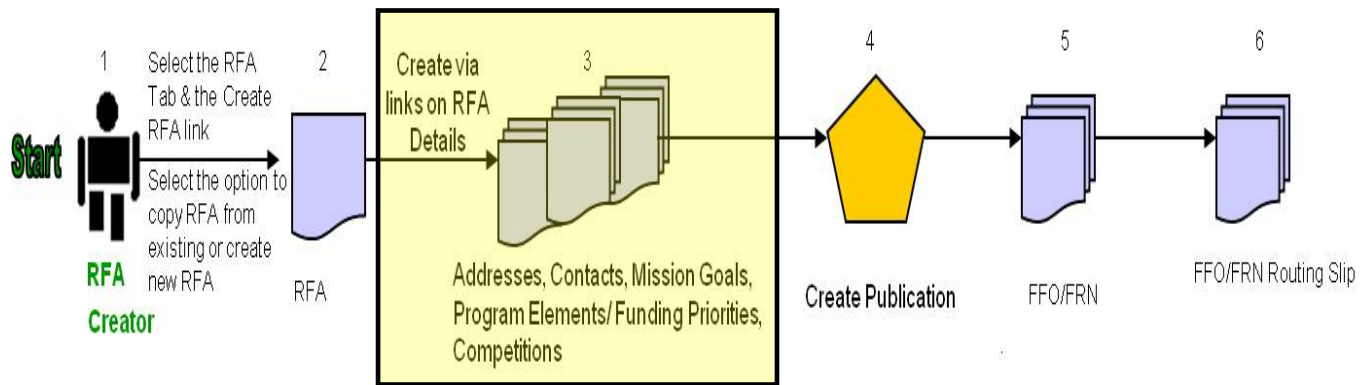
[Add to RFA](#)

Selected Addresses for this RFA

Nothing found to display.

[Remove from RFA](#)

[Done](#)



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

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

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

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

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

Add Program Element/Funding Priority

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

Name: *

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

Description:

Description of Program Element "A" goes here.

45 / 4000 [Spell Check](#)

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

Program Element/Funding Priorities

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

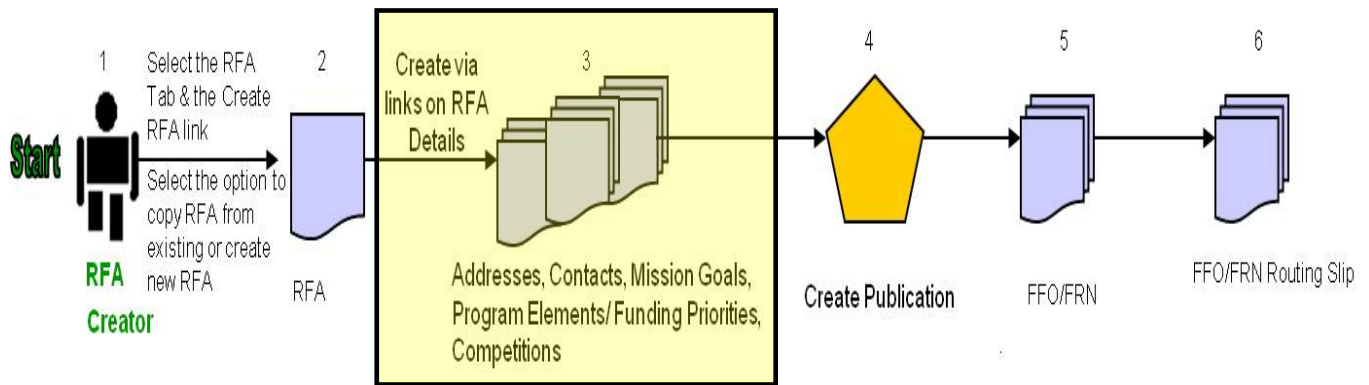
[Reorder](#)

[Add New](#)

[Done](#)

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.



Competition Name * Fiscal Year *

Competition Type * ☐ Group ☐ Individual Qualification

Assigned Program Office *

Competition Manager *

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.

Competition Name * Fiscal Year *

Competition Type * ☒ Group ☐ Individual Qualification

Assigned Program Office *

Competition Manager *

Selecting Official *

Anticipated Federal Funding for this Competition *

Required Federal Funding (in Dollars) per Application

Cost Share (%) per Application

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](#)

NOTE: The Review Criteria Type is only available for NOAA application processing.

NOTE: For more information please reference item #7 on the FPO Training Resources site – SAC (Special Award Conditions) Quick Reference Guide:
http://www.corporateservices.noaa.gov/grantsonline/gol_training_FPO.htm

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

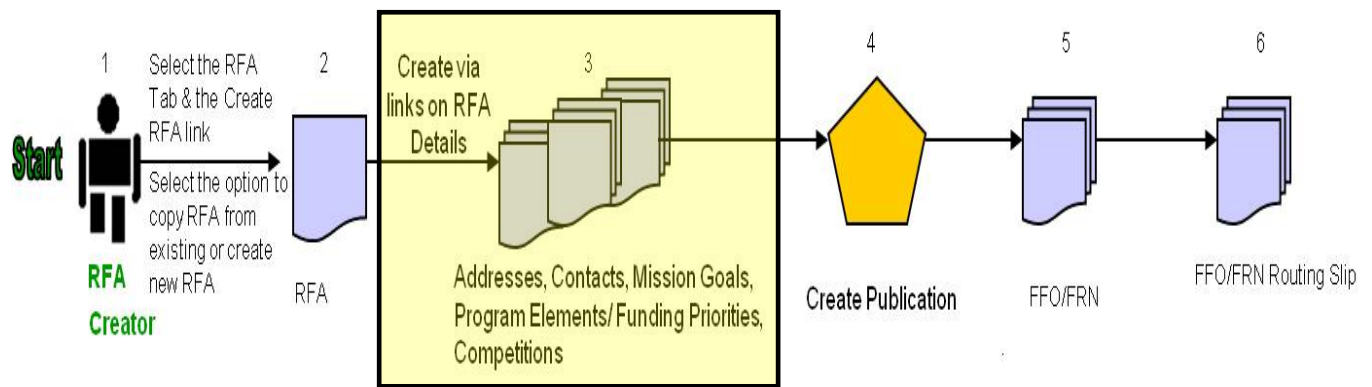
NOTE: There can be competitions for more than one fiscal year in a single RFA.

- In most cases the user will choose **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. Choose **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. Click **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.



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](#)

NOTE: This link is only available for NOAA.

Points Scoring Criteria

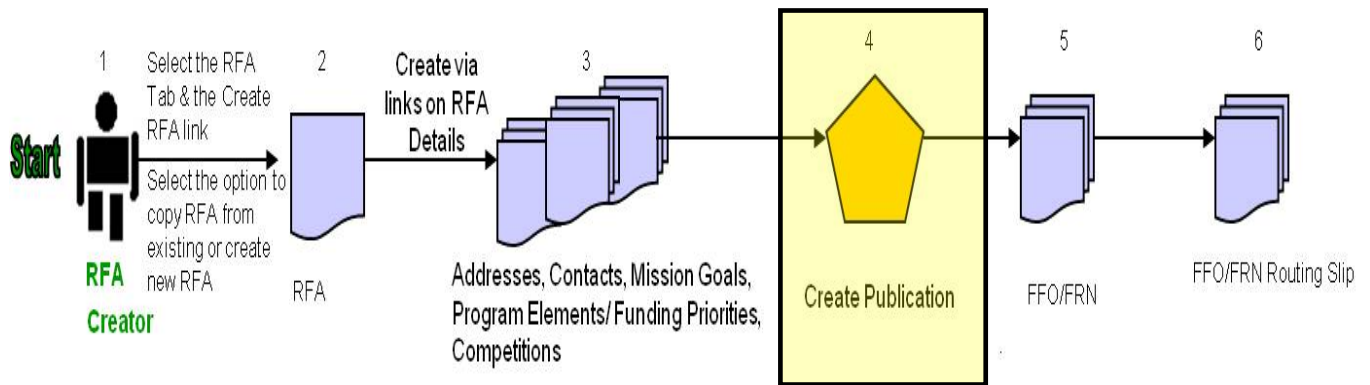
Name	Reviewer Comments	Reviewer Score	Minimum Score	Maximum Score	Action	Action
Technical/Scientific Merit	Required	Required	0.0	40.0	Edit	Delete
Importance/Relevance and Applicability of Proposal to the Program Goals	Required	Required	0.0	20.0	Edit	Delete
Overall Qualification of Applicant	Required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

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

[FFO Evaluation Criteria Report](#) [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 click **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).



Competition

Id: 2199731
Status:

Action:

Your Comments:

Workflow Analysis

The following needs to be completed before applications can be selected for competition:

- The RFA must be published.
- Reviewer Instructions must be reviewed by FALD.
- There must be applications that have passed minimum requirements.

RFA

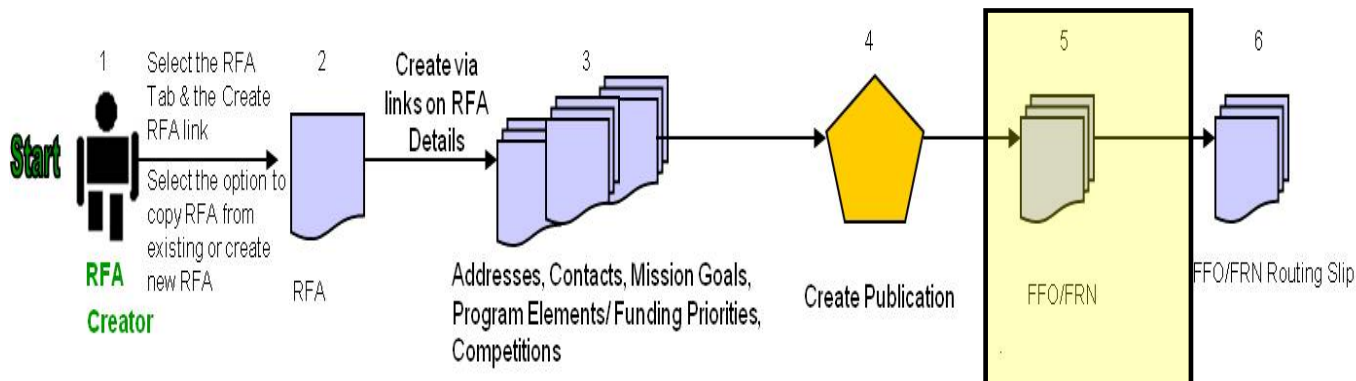
Id: 2199641
Status:

Action:


Your Comments:

Attachments:

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.



Federal Funding Opportunity

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

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

Regulatory Information Number (RIN)

Executive Summary

Federal Agency Name

Funding Opportunity Title

Announcement Type Initial

FFO Number NOAA-GOT-OCPO-2014-2003461

Catalog of Federal Domestic Assistance (CFDA) Number

[Dates](#) ✓

[Funding Opportunity Description](#) ✓

Full Text of Announcement

I. Funding Opportunity Description

A. [Program Objectives](#) ✓

B. [Program Priorities](#) ✓

C. [Program Authority](#) ✓

II. Award Information

A. [Funding Availability](#) (empty)

B. [Project/Award Period](#) (empty)

C. [Type of Funding Instrument](#) (empty)

III. Eligibility Information

A. [Eligible Applicants](#) (empty)

B. [Cost Share or Matching Requirement](#) (empty)

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

Federal Funding Opportunity (FFO). The FFO will be available on Grants.gov. All grant programs must continue to develop FFO announcements, with the appropriate information and selection procedures, and to make it available on Grants.gov. The Office of Management and Budget (OMB), Office of Counsel for Legislation and Regulation (L&R), those FFO announcements that require L&R may coordinate the review and clearance of those announcements.

any other statutory or regulatory requirements to publish a Notice of Funding Availability (NOFA) if required to do so by any law or regulation. For these situations, Grants.gov will be used.

Grants.gov throughout the fiscal year. Federal Program Officers are responsible for ensuring that your FFO being routed to FALD.

required by the Office of Management and Budget. Additionally, the Department of the Interior (DOI) has a required standard format, modeled on the FFO, for the Federal Register Notice.

format of the Federal Funding Opportunity details page that you will see on Grants.gov, which will be posted at Grants.gov. Fields on the FFO page that are required for the FFO details page are:

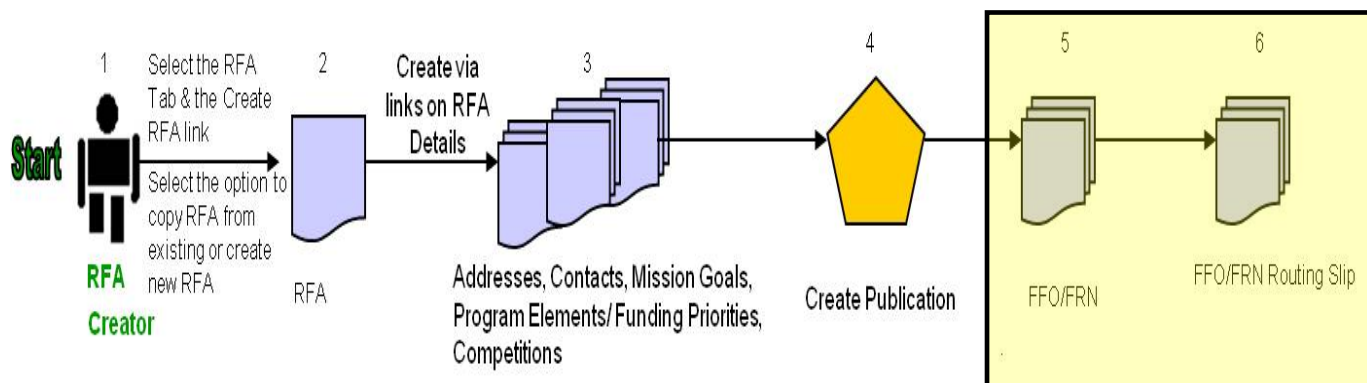
- Data previously entered into other parts of the RFA will not carry over to these fields. This forces the user to format the paragraphs appropriately for publication. Similarly, if the “Create New from Existing” option was used to create the RFA, the publication’s fields are blank. Again this forces 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.”



Routing Slip

Assigned Program Officer

The Assigned Program Officer must be on the routing slip. The Assigned Program Officer is set on the RFA details page.

Participant Name User Name
AssignedProgramOfficerGrants Student00

Optional Reviewer

An RFA can be sent for optional review. You may select one or more person(s) as optional reviewers. If you select optional reviewers, please note that you will have to wait for ALL optional reviews to come back before you can initiate application package posting.

Nothing found to display.

[Add Optional Reviewer](#)

Grants Specialist

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

Participant Name User Name
GrantsSpecialist NOAA Grants Specialist

Federal Assistance Law Division (FALD)

All members of FALD will receive a task to review this document. One FALD user will claim ownership of the review task and all further FALD tasks for this document will be assigned to that person.

Participant Name
FALD

RFA Publisher

All RFA Publishers will receive a task to review this document. One RFA Publisher will claim ownership. This is the person who coordinates and posts the 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](#)

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 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.



Grants Online Training

Competitive RFA Review and Processing

November 2016

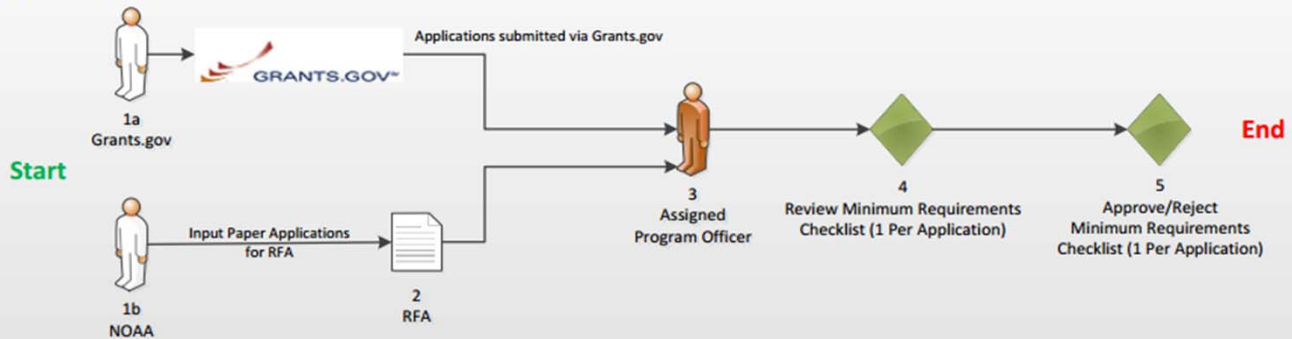
Competitive Process – Application and Review Event

Applications and Review Event Overview (COMP-2)

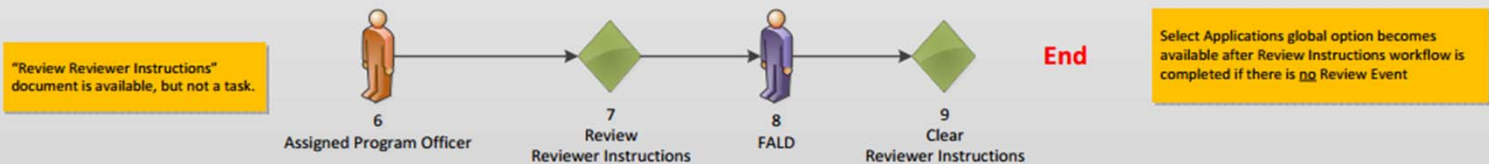
June 1, 2016

Version 4.19

Receive applications



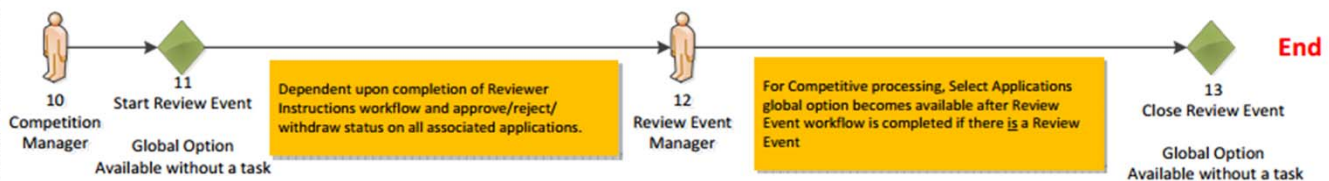
Review Reviewer Instructions



Review Event Workflow

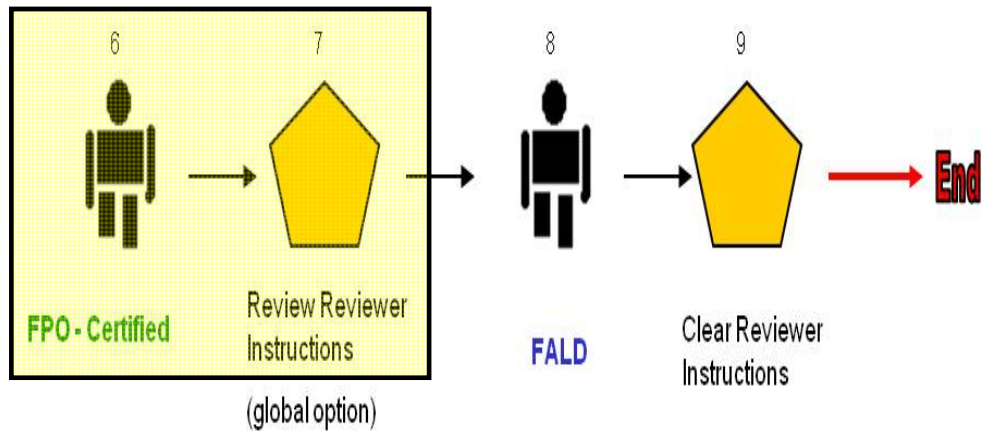
Only if Review Event Exists

- Review Events are optional in Grants Online.
- Review can be conducted using Grants Online functionality or outside of Grants Online



At this point we will follow the same steps to input a paper application that we used for the Universal process, please reference **Pages 54-56** of this Training Manual.

For further details of the Review Event and Reviewer processes, please reference **Pages 88 & 89** of this Training Manual.



Sub Documents

Type	ID	Title	Status
Applications Report	2281181	Applications Report	
Selected Applications	2281181	Selected Applications	
Review Event	2281183	Review Event #1 -- created December 14, 2015	
Review Event	2281203	Review Event #2 -- created December 14, 2015	ManageReviewEvent - Not Started
Reviewer Instructions	2281182	Reviewer Instructions for Review Event #1 -- creat...	FALDActions - Complete
Reviewer Instructions	2281204	Reviewer Instructions for Review Event #2 -- creat...	FALDActions - Complete

Export options: [Excel](#)

Reviewer Instructions

Attachments:

Name	Short Description	Created Date	Internal Use Only	FALD Reviewed	Remove
2nd screen shot for page 102.docx	This is where I would describe the Reviewer Instructions	01/27/2016 03:41:34 PM	No	No	Remove

Add new Attachment: [\[+\]](#)

Any changes to information on this page should be saved before adding or removing attachments.

Save

Logistical Reviewer Instructions

Attachments:

No attachments.

Add new Attachment: [\[+\]](#)

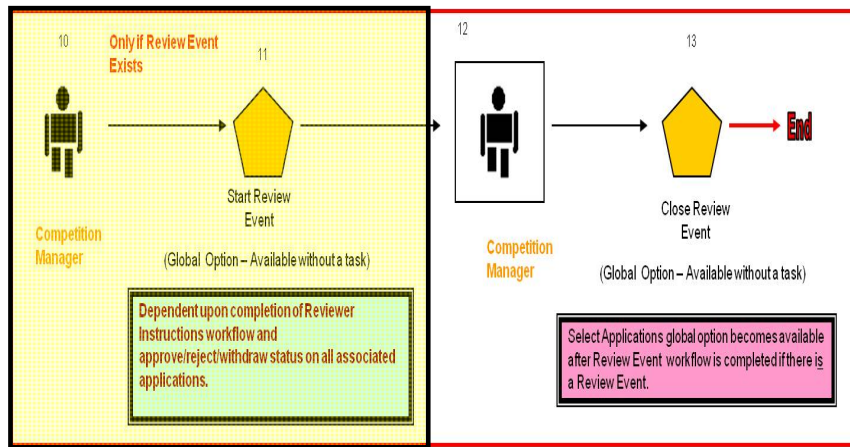
Any changes to information on this page should be saved before adding or removing attachments.

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. 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.

- Prior to starting the Review Event, the Reviewer Instructions must be reviewed by FALD. The FPO will not have the option to start the Reviewer Instructions workflow until FALD approves the Reviewer Instructions. To start the workflow, navigate to the Competition launch page and click the ID link for the Reviewer Instructions (under the sub-documents section).
- There are two sections on the Reviewer Instructions Details page:
 - The top section is mandatory and must be completed. Reviewer Instructions provide the procedural/technical requirements for conducting the review. All attachments should be added to the application prior to starting the workflow.
 - The bottom section (Logistical Instructions) is optional. Logistical Instructions are intended for panel reviewers and detail the logistics of convening a panel to review applications. FALD review and approval is not required for this component of the Reviewer Instructions.



Inbox RFA Application Awards Account Management Reports Help

Welcome to Grants Online Ms. Grants A. Student25. You are logged in to TRAIN1P. [Log Off](#)

[Advisories](#) >> [Tasks](#) >> [Search RFAs](#) >> [RFA](#) >> [Competition](#) >> [Independent Individual Merit Review](#)

Independent Individual Merit Review

Id: 2279925
Status:

Action: **Submit**

Your Comments:

Spell Check

Save Comment

Independent Individual Merit Review

Id: 2279925
Status: ManageReviewEvent - Not Started

Action: **Submit**

Your Comments:

Save Comment

Workflow Analysis

There is an open workflow task on the Review Event. All Review Events must be completed through closeout before applications can be selected for funding.

Workflow History

Name	Date Assigned	Date Started	Date Completed	Performer	Role	Action Taken	Current Status
Start Review Event	11/02/2015 05:10:13 PM	11/02/2015 05:10:13 PM	11/02/2015 05:10:13 PM	Grants A. Student25		StartReviewEvent	Complete

Export options: [Excel](#)

- The Competition Manager should navigate to the Review Event launch page (RFA → Search for the RFA → Competition → select the appropriate Review Event). From the Action dropdown Menu, the Competition Manager should select **Start Review Event** and click the **Submit** button. In this instance, we are working on an Independent Individual Merit Review. If the option to start the Review Event on the dropdown menu is not visible, the Competition Manager should view the Workflow Analysis box to determine the status of the application.
- When the Competition Manager starts the Review Event, the Review Event Manager receives a task in his/her Inbox to “Manage the Review Event”. The Review Event functionality will be demonstrated during the Open Forum Session Wednesday afternoon.
- When the Review Event Manager has logged onto his/her account and the Workflow History is visible, it can be observed that the task **Start Review Event** is complete; however, the task to **Manage Review Event** has not started. In addition, there is an option on the Action dropdown menu to **Close Review Event**.

Competitive Process – Review Event

Review Event Workflow – Federal Agency (REF)

January 28, 2016

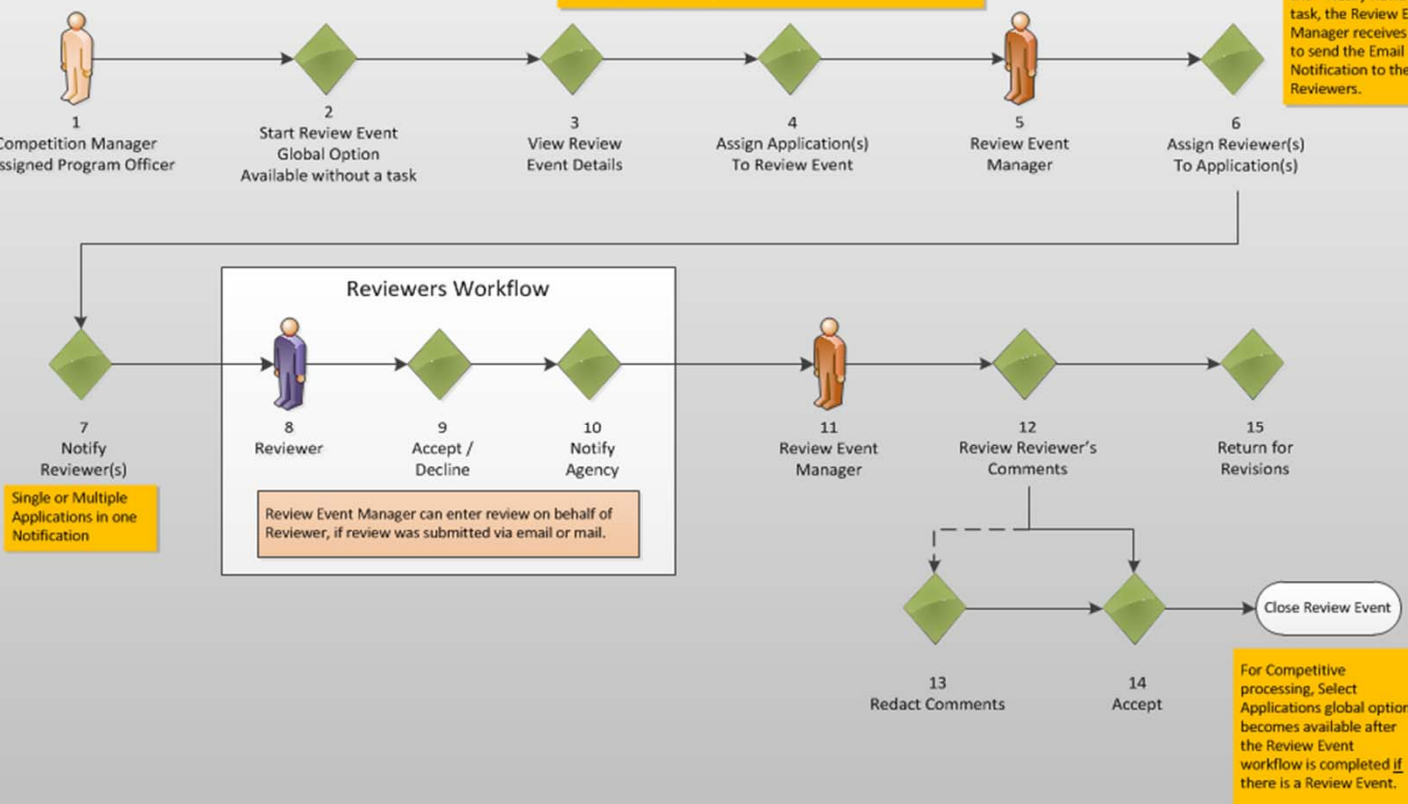
Version 4.18

Only if Review Event Exists

- Review Events are optional in Grants Online.
- Review Event is conducted for both Competitive and Universal, if chosen.
- Review can be conducted using Grants Online functionality or outside of Grants Online.

Assign Application(s) to Review Event (Step 4) is required only after the first Review Event. The first Review Event will have every application added to it automatically. Applications for subsequent Review Events must be added by the Competition Manager/Assigned Program Officer.

Once the Competition Manager/Assigned Program Officer selects the "Notify Reviewers" task, the Review Event Manager receives the task to send the Email Notification to the Reviewers.



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

Review Event Guidance

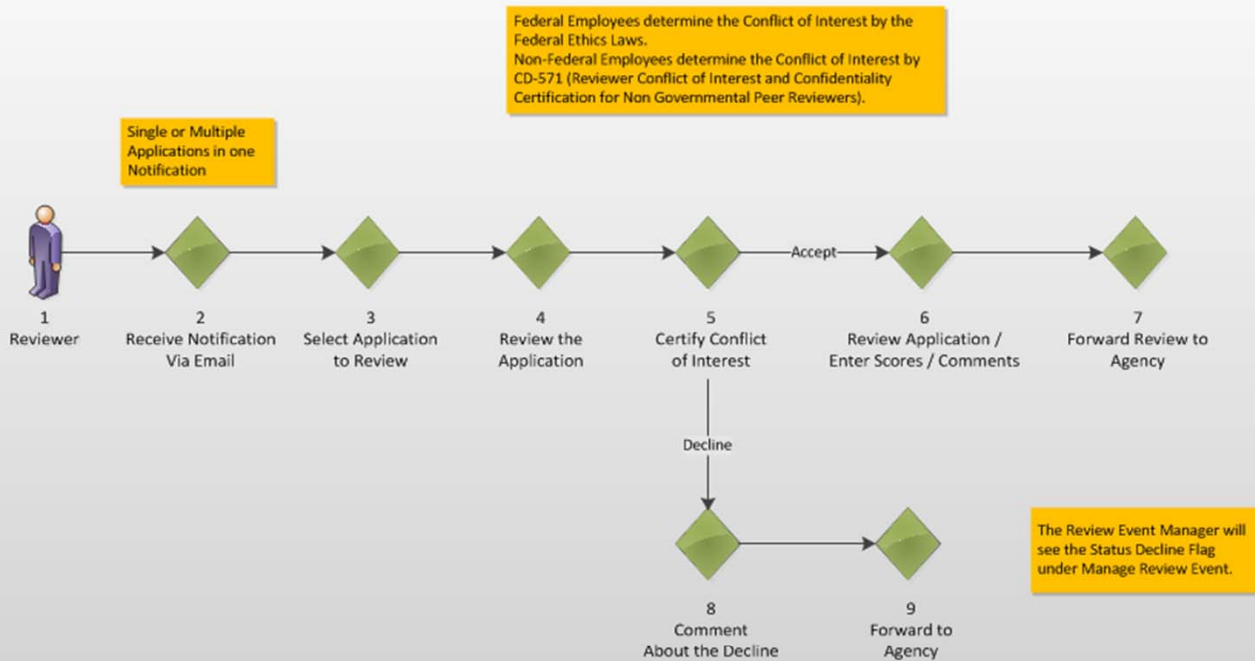
- Creating a Review Event - http://www.corporateservices.noaa.gov/grantsonline/Documents/Quick%20Reference%20Guides/ReviewEvent_Creation.pdf
- Conducting a Review Event - http://www.corporateservices.noaa.gov/grantsonline/Documents/Quick%20Reference%20Guides/ReviewEventManager_UserGuide.pdf
- Conducting an Application Review - http://www.corporateservices.noaa.gov/grantsonline/Documents/Quick%20Reference%20Guides/Reviewers_Quick_Ref_Guide_4_08.pdf

Competitive Process – Reviewer

Review Event Workflow – Reviewer (RER)

January 28, 2016

Version 4.18



Competitive Process – Select Applications for Funding

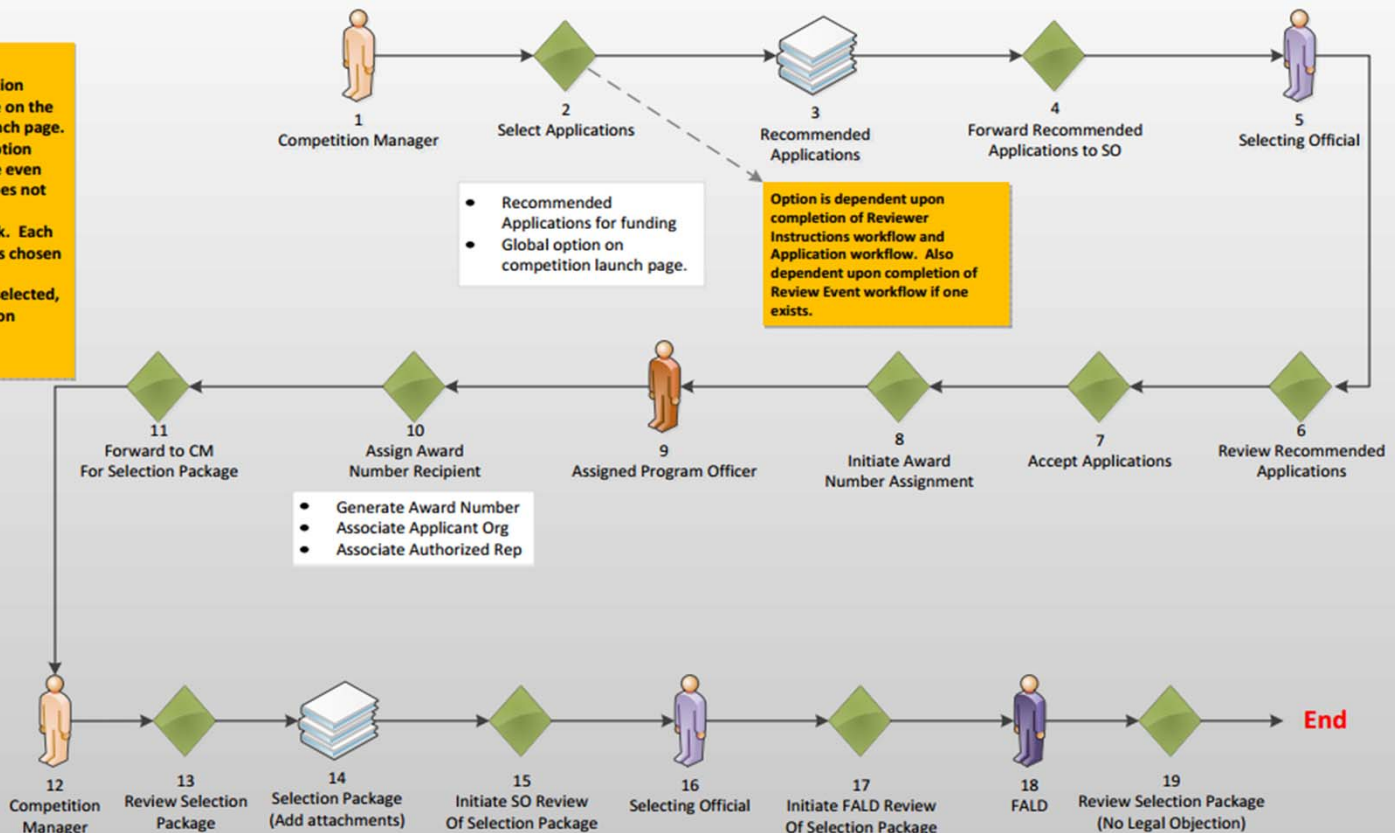
Competitive Process (COMP-3)

January 28, 2016

Select Applications for Funding Overview

Version 4.18

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.



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. For further details, please reference **Pages 59-64** of this Training Manual.

When the Award number has been generated, click Save and Return to Main. Next, choose 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.

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.

Competitive Process – Start Award Processing

Start Award Processing Overview (COMP-4)

June 1, 2016

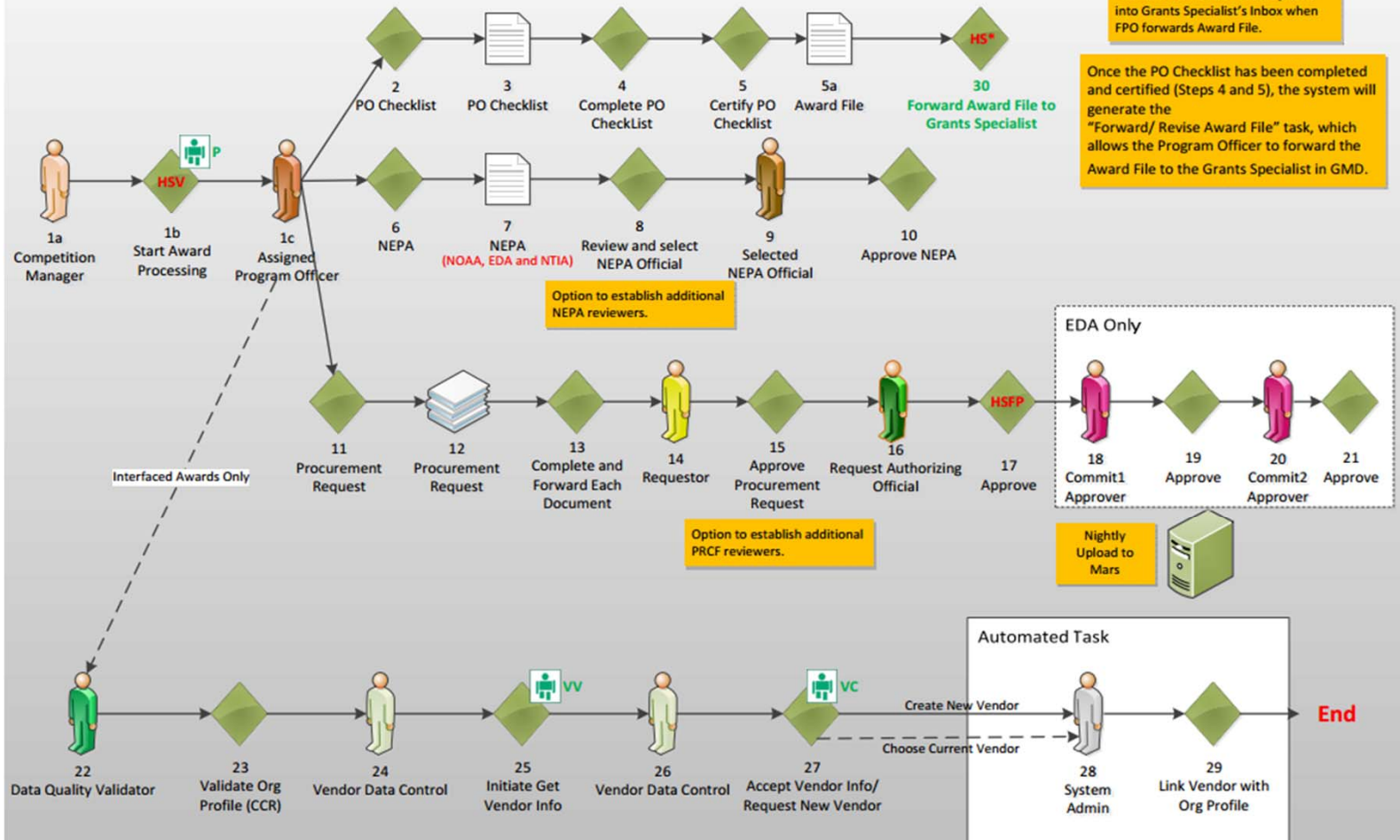
Version 4.19

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

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

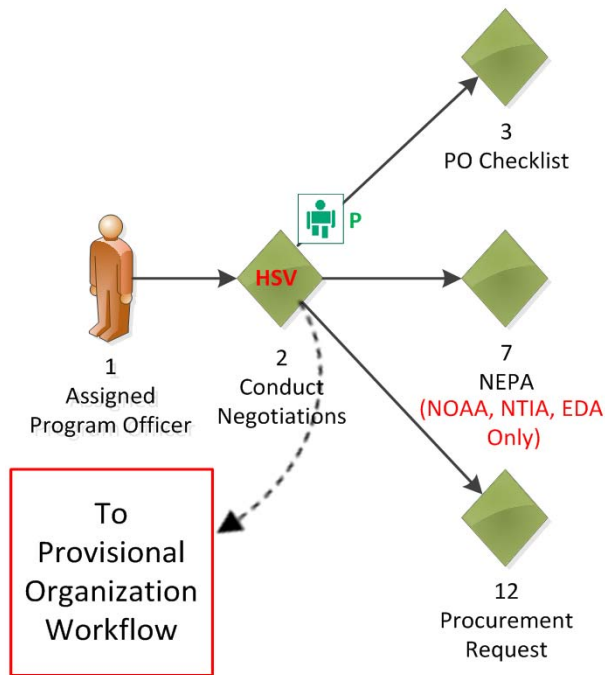
"Review Award File" Task is placed into Grants Specialist's Inbox when FPO forwards Award File.

Once the PO Checklist has been completed and certified (Steps 4 and 5), 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.



Steps 1a-1b

- To move forward with application processing, the Competition Manager chooses 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:

Action:

Your Comments:

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	2245442	05/22/2012		2012	Procurement Request and Commitment of Funds: Not Started
Organization Profile	2245445	05/22/2012	\$5,000.00	2012	Validate Organization Profile: Not Started
Organization Profile	2245445	05/22/2012	\$5,000.00	2012	Validate Organization Profile: Not Started

Your Tasks

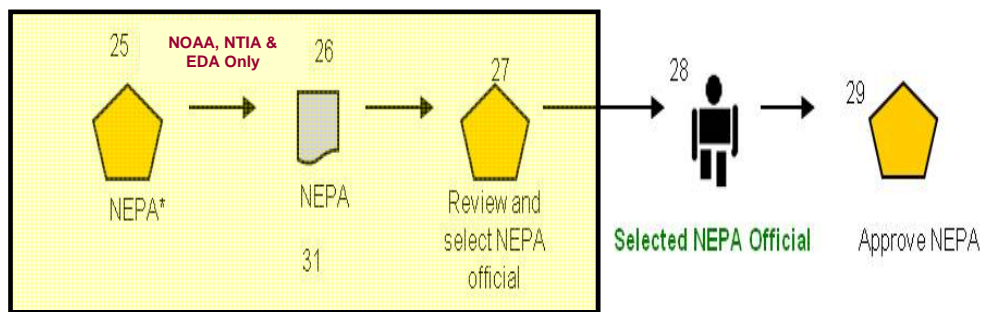
Document Type

Status

32 items found, displaying all items. 1

View	Task Name	Award Number	Task Received Date	Document Type	Project Title	Task Status	Document Id	Task Id	Start Date	Completed Date	Applicant Name	Propose Number
View	Procurement Request and Commitment of Funds	NA11GOT9990039	02/02/2011	Procurement Request and Commitment of Funds	Test/Training App 1 for Not Release 4.06 Comp RFA Started		2199722	1795342			Institute for Community Managed Resources (ICMR)	LB Test App 1
View	NEPA Document	NA11GOT9990039	02/02/2011	NEPA	Test/Training App 1 for In Release 4.06 Comp RFA Progress		2199724	1795341	02/02/2011		Institute for Community Managed Resources (ICMR)	LB Test App 1
View	Complete PO Checklist	NA11GOT9990039	02/02/2011	PO Checklist	Test/Training App 1 for Not Release 4.06 Comp RFA Started		2199723	1795340			Institute for Community Managed Resources (ICMR)	LB Test App 1
View	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

- 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 chooses **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.



NEPA Environmental Review Requirements

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](#)

a.) Level of Review

Indicate below the level of environmental review that has been conducted for the proposed action.

☐ Categorical Exclusion (Attach memo if required.)

[Select/View CE](#)

Nothing found to display.

☐ Finding of No Significant Impact associated with Environmental Assessment Programmatic Environmental Assessment.

☐ Record of Decision associated with Environmental Impact Statement.

☐ Other - Explanation in Attachment.

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 ☐ YES ☐ [Special Award Condition](#)

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 ☐ YES ☐ [Special Award Condition](#)

d.) National Historic Preservation Act

Indicate below the conclusion of the review conducted per section 106 of the National Historic Preservation Act:

- ☐ No potential to cause effects (36 CFR § 800.3(a)(1))
- ☐ No historic properties affected (36 CFR § 800.4(d)(1))
- ☐ No adverse effect (36 CFR § 800.5(d)(1))
- ☐ Adverse effects resolved (36 CFR § 800.6)
- ☒ Not Required

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 if the proposed change has no effect individually or cumulatively on the human environment, the record with a copy submitted to the NEPA Coordinator, and a brief statement with
<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 (40 CFR 1508.4).
<input type="checkbox"/> 6.03b.2	Examples of Restoration Actions Eligible for a CE

NOAA, NTIA, and EDA ONLY

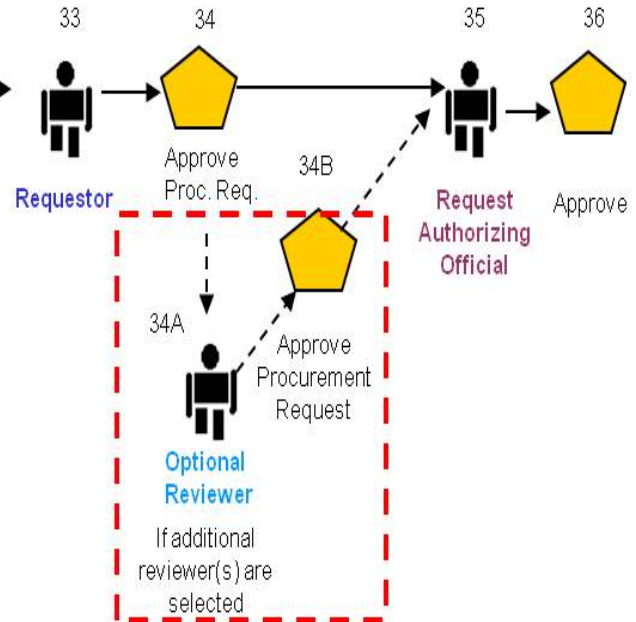
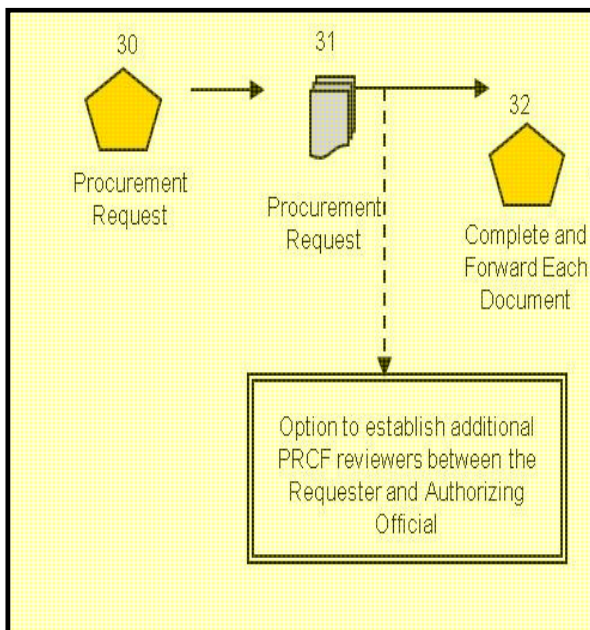
From the Action dropdown menu, choose **Complete NEPA Document** and click the **Submit** button. The NEPA Details screen displays four questions for which the user must provide a response. After responding to the questions, add any relevant attachments and identify the NEPA Official who will perform the final NEPA approval.

NOTE: The user can opt to send the NEPA document to NEPA Reviewers prior to forwarding to the NEPA Official. In that scenario, the NEPA document is sent to all identified NEPA Reviewers for the user's Program Office. The NEPA Reviewer who acts on the task first is the "owner"; the task is removed from the Inbox of all remaining NEPA Reviewers.

For this class choose **Internal Reviewer** as the NEPA Official. After clicking **Save and Return to Main**, choose **Forward NEPA Document** from the Action dropdown menu and click the **Submit** button. The user is redirected to his/her Inbox where s/he will see the NEPA Document task is no longer visible. The task has advanced to the next step in the workflow. The user can locate old tasks by changing the filter on his/her Inbox from "Open" to "Closed."

NOTE: For additional information regarding the NEPA process, please reference:

http://www.corporateservices.noaa.gov/grantsonline/NEPA_Guidance.html



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 committed)

Requestor: *

None Selected.

[Search](#)

The ACCS is valid

Validated: true

Bureau (xx): * 14

Fund (xx): * 1

Fiscal Year (yyyy): * 2016

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: [Select Descriptor](#)

Amount: * \$2,000.00

Type: X

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 ID
14	1	2016	30-31-0002-00-00-00-00-00	02-21-16-001	28LEF29-P00	41-11-00-00	\$2,000.00	N	Yes	---

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

Federal Share: * \$500,000.00

Requisition Number: *

Affected Reference Number: NA16NMF4130006

EIN: 987654321

DUNS: 123456789

To: *

TEST ORG INC.
123 Germantown Road Germantown, MD
20876

Description: *

CFDA Number: 11.413

Project Start Date: 2015-10-01

Project End Date: 2019-09-30

Grant Type: not entered

Project Description: Training App 1

Automatically filled in after Authorizing Official and Requestor have been selected

Accounting - ACCS Lines *

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWValidated	Unique Account ID	Action
14	1	2016	30-31-0002-00-00-00-00-00	02-21-16-001	28LEF29-P00	41-11-00-00	\$125,000.00	N	Yes	COUNCILCOMMISSION---	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

- Next, click the **Procurement Request** task from the Inbox and then choose **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)). Click the **Save** button.
- 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_FPO2015_Feb.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, click 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, choose 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

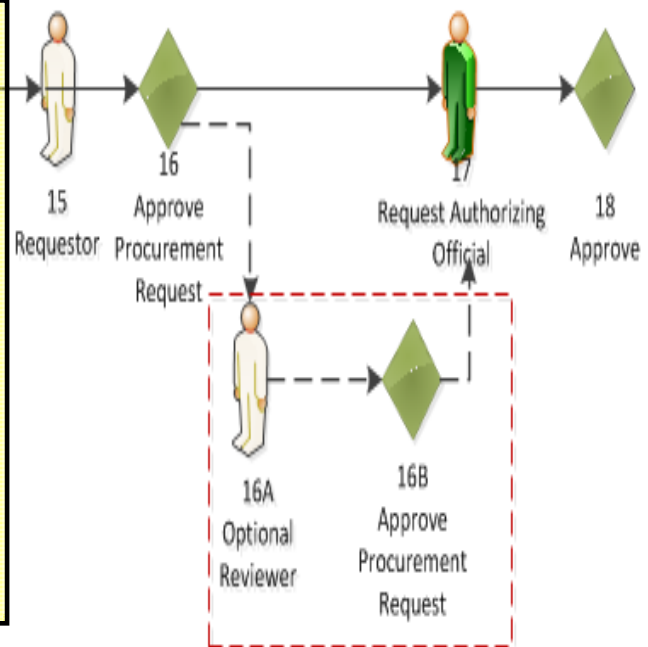
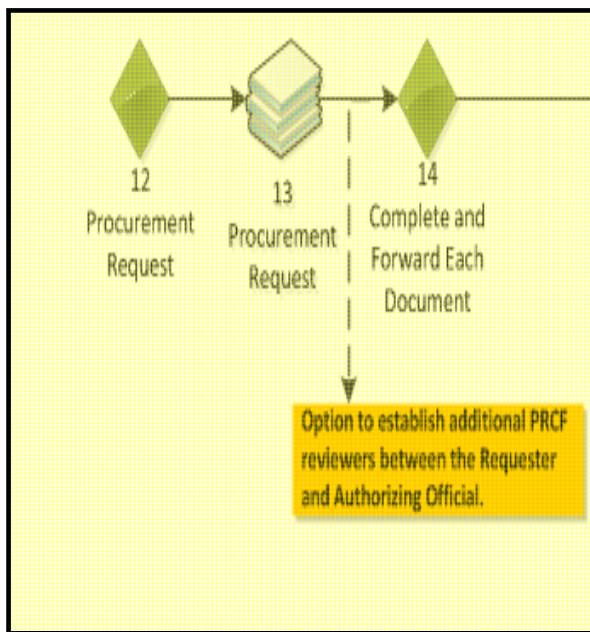
Prior Year Fund: No ▼

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

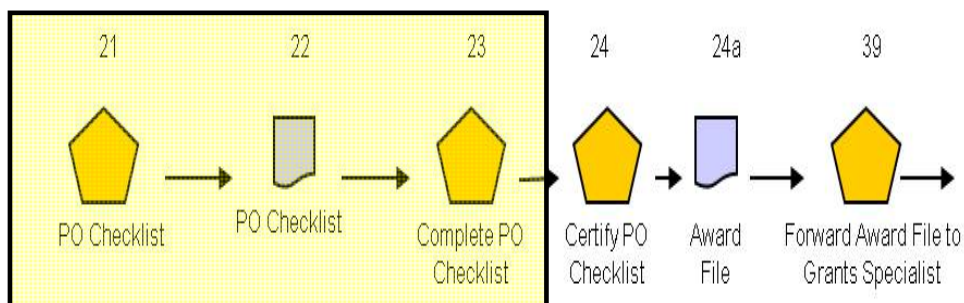
[Cancel](#)

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 validation 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.”
- Click **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 choose **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. Choose **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:

Matching Requirements: * [Guidance](#)

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

[Add New](#)

Project Description/Abstract * [Guidance](#)

[Spell Check](#)

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

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 Grants Management.
- 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.

Forward/Revise Award File

- Once the PO Checklist has been completed and certified, the system will generate the Forward/Revise Award File task, which will enable the project officer to move the file from the “Program Office” side of Grants Online to the “Grants Specialist” side of Grants Online in order to continue processing.
- NOTE that while the task will be generated once the PO Checklist is certified, the project officer will not be able to move the file forward to the Grants Specialists tasks, until *all* of the Program tasks (the PO Checklist, the Procurement Request and Reservation of Funds, and the NEPA Checklist), have been fully completed and approved. A large red “X” will show on the Award File in Progress page, along with a table of outstanding tasks, until all outstanding tasks are completed.


Award File In Progress - NA16GOT9990003

Id: 2444052
Status: ProgramOfficerActions - Not Started

Action: Please select an action Submit

Your Comments: Please select an action

- Forward Award File to Grants Specialist
- Forward Award File to Grants Specialist and Ignore Warnings
- Reassign Award File
- Renegotiate
- Revise NEPA Document
- Revise PO Checklist
- Revise Procurement Request and Commitment of Funds
- View FAIS Sheet
- View Reporting Requirements

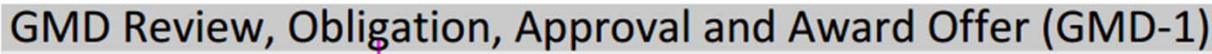
Pending Actions 

2 items found, displaying all items.1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status	Last Action Date	Last Action User
NEPA	2279932	12/17/2015	\$100,000.00	2016	Review NEPA Document: Not Started		EDA Reviewer
Procurement Request and Commitment of Funds	2279930	12/17/2015	\$100,000.00	2016	Review Procurement Request and Commitment of Funds: Not Started		EDA Reviewer

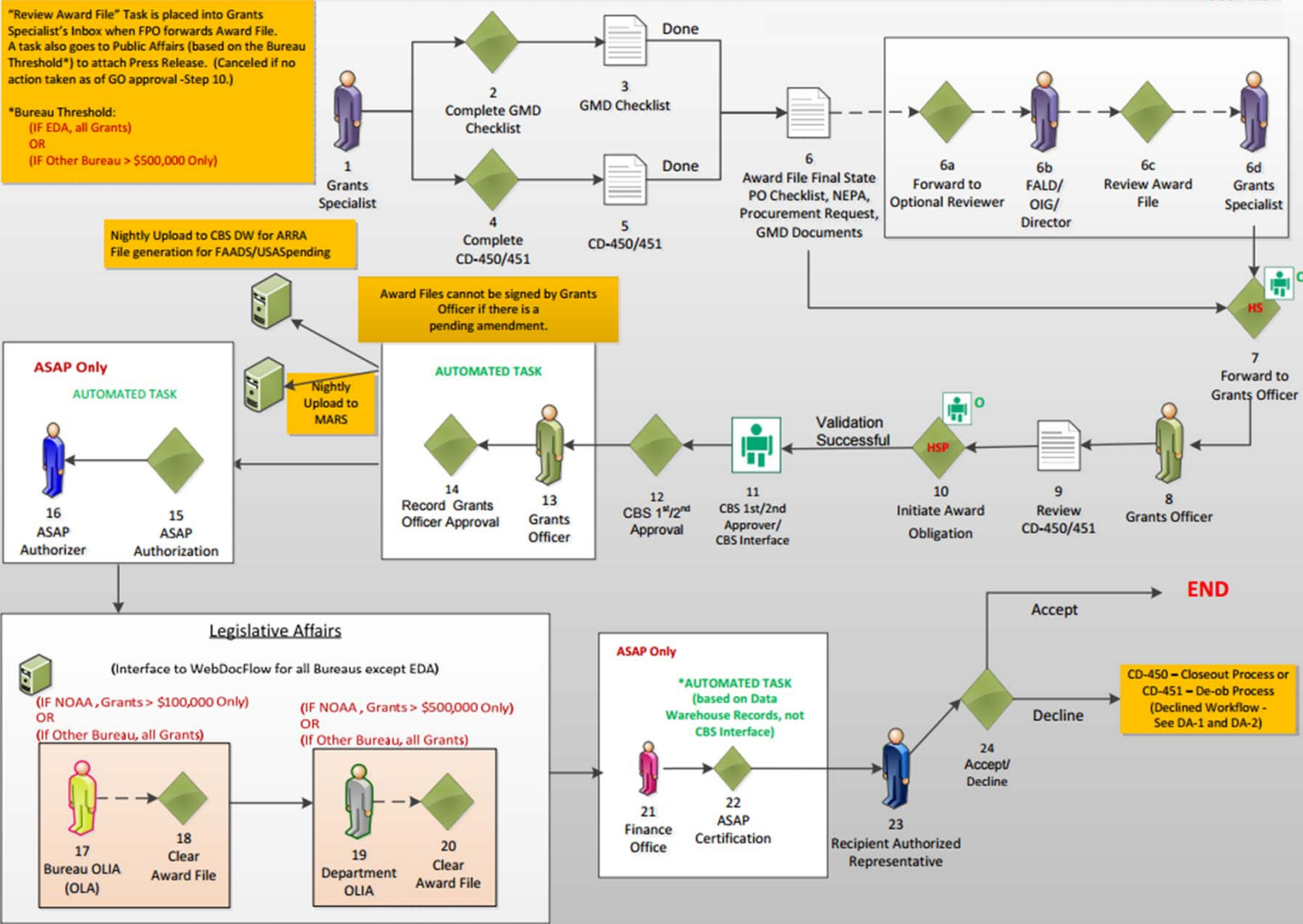
- After all the required tasks are completed, the red “X” will change to a green checkmark, signifying that the file is ready to move to the Grants Specialist workflow.
- Should any of the Program tasks need to be modified, the “Forward/Revise Award File” task will enable the user to “revise” any of the Program documents, or “Renegotiate,” if elements of the SF-424 page need to be corrected. If the project officer chooses to modify a document, it will need to move through the entire workflow/approval process, before the file can move forward to the Grants Specialist workflow.
- Once all of the program tasks have been completed, the project officer to choose “Forward Award File to Grants Specialist” option. Note that this will automatically forward the file to the “Lead Grants Specialist” for that line office/CFDA number combination.
- EDA Only:** If the EDA project officer needs to complete the Grants Specialist tasks, but is not the “Lead Grants Specialist,” the Grants Specialist task to “Review Award File,” will need to be reassigned back to the EDA project officer.

Grants Management Process



October 26, 2016

Version 4.20



Please note: The FPO should communicate to the Recipient that the Decline Award process should not be used if an update is needed.

- When the Award File has been forwarded to Grants Management there are several additional steps that take place before the award offer is sent to the recipient. The Grants Management workflow steps for processing a Competitive application package are exactly the same as for the Universal application package with the exception of the Grants Management 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 Grants Management, 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.
- For non-NOAA bureaus (except EDA) using Grants Online, all awards are routed to WebDocFlow for OLIA clearance, irrespective of award amount. In addition, this rule applies to awards that require bureau-level OLA clearance. For NOAA, the determining factor for WebDocFlow routing is the award amount. For EDA, the OLIA and OLA tasks are manually cleared.

Federal Program Officer Training Agenda

Day 2

Post Award Processing & Reporting
Introduction and Agenda
Hands-On Participation – Complete Award Package Processing from Day 1
Hands-On Participation – Grants Management Processes
Hands-On Participation – Recipient Award Acceptance / Manage Users
Hands-On Participation – Award Action Requests
Hands-On Participation – Progress Reports / Financial Reports (Demo Only)
Hands-On Participation – Partial Funding (Release of Funds)
Demo Only – Additional Post Award Actions <ul style="list-style-type: none">– Award Tracking Report– Organization Profile Changes (SAM.gov)
Hands-On Participation – Supplementary Information
Hands-On Participation – Correspondence and Federal Reports
Wrap Up: <ul style="list-style-type: none">Additional Resources and TrainingQuestions/Concerns & Answers

OBJECTIVES – By the end of the day, students should:

- Understand the Recipient Award Acceptance process
- Understand the use of an Award Action Request
- Review an Award Action Request
- Review, route and accept a Performance Progress Report
- Locate and view a Federal Financial Report
- Understand the use of a Partial Funding Action
- Initiate and route a Partial Funding Action
- Understand additional Post Award Processes
- Know where to find help when needed

TRAINING MATERIALS:

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



Grants Online Training

Post Award Processing

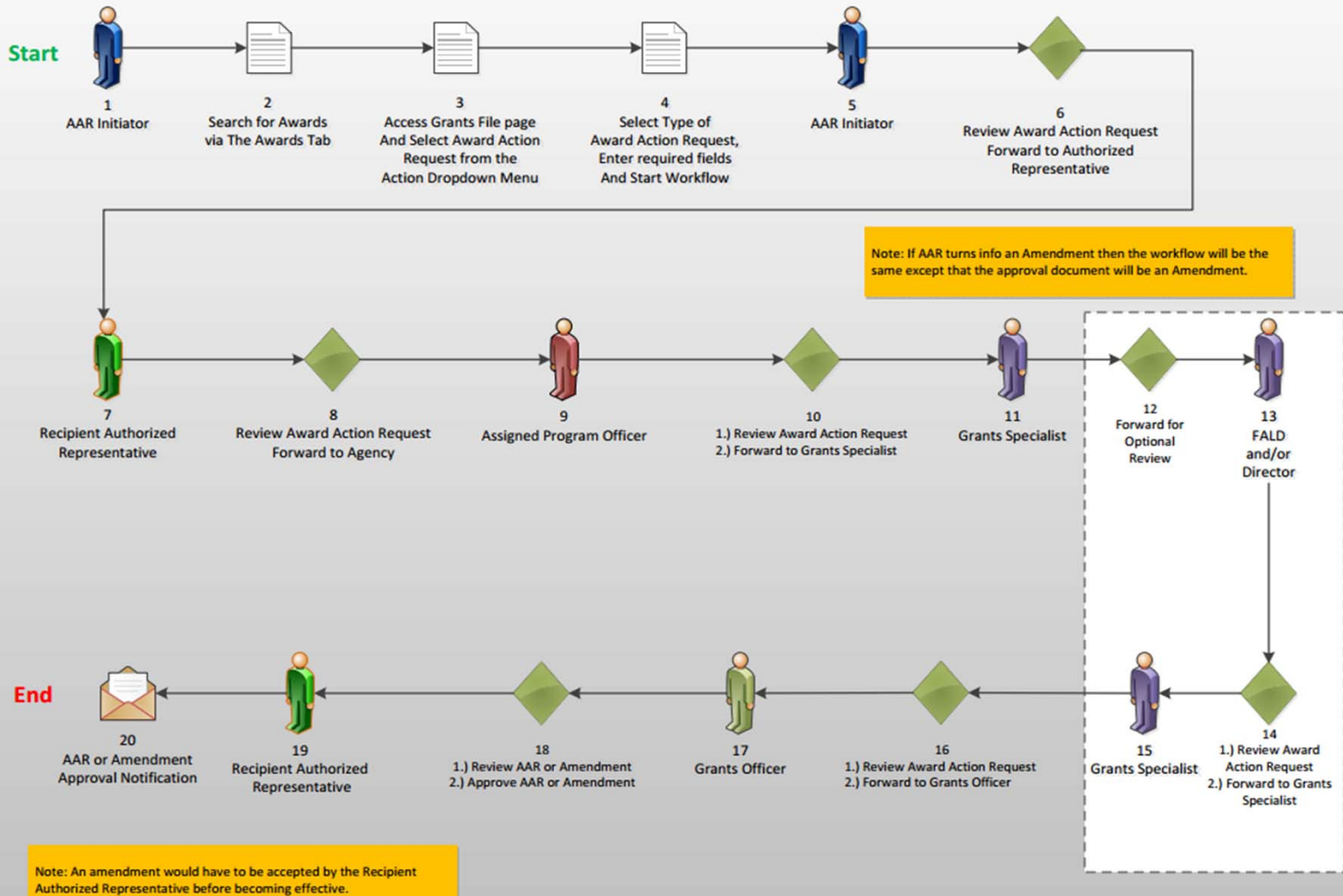
November 2016

Award Action Request (AAR)

Award Action Request Workflow (AAR-1)

May 3, 2016

Version 4.19



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.

* No Cost Extension - Prior Approval Required

Extension to Close Out

* Change in Scope

* Transfer of Award

Change in Principal Investigator/Project Director

Change in Key Person Specified in the Application

Satisfied Special Award Conditions

Transfer of funds allotted for training to other categories of expenses

Pre-Award Cost

Submit Additional Closeout Documents

Other

No Cost Extension - Prior Approval Waived (Research Terms and Conditions)

Reprogram or Rebudget

Equipment Purchase

Foreign Travel

Sole Source Contract

Absence of more than 3 months or 25% by project director or PI

Inclusion of cost that require prior approval based on cost principles

* Sub award, transfer or contracting out of any work under the award if not described in the approved application

* Termination for Convenience

Reference: Award Action Request Guidance link:

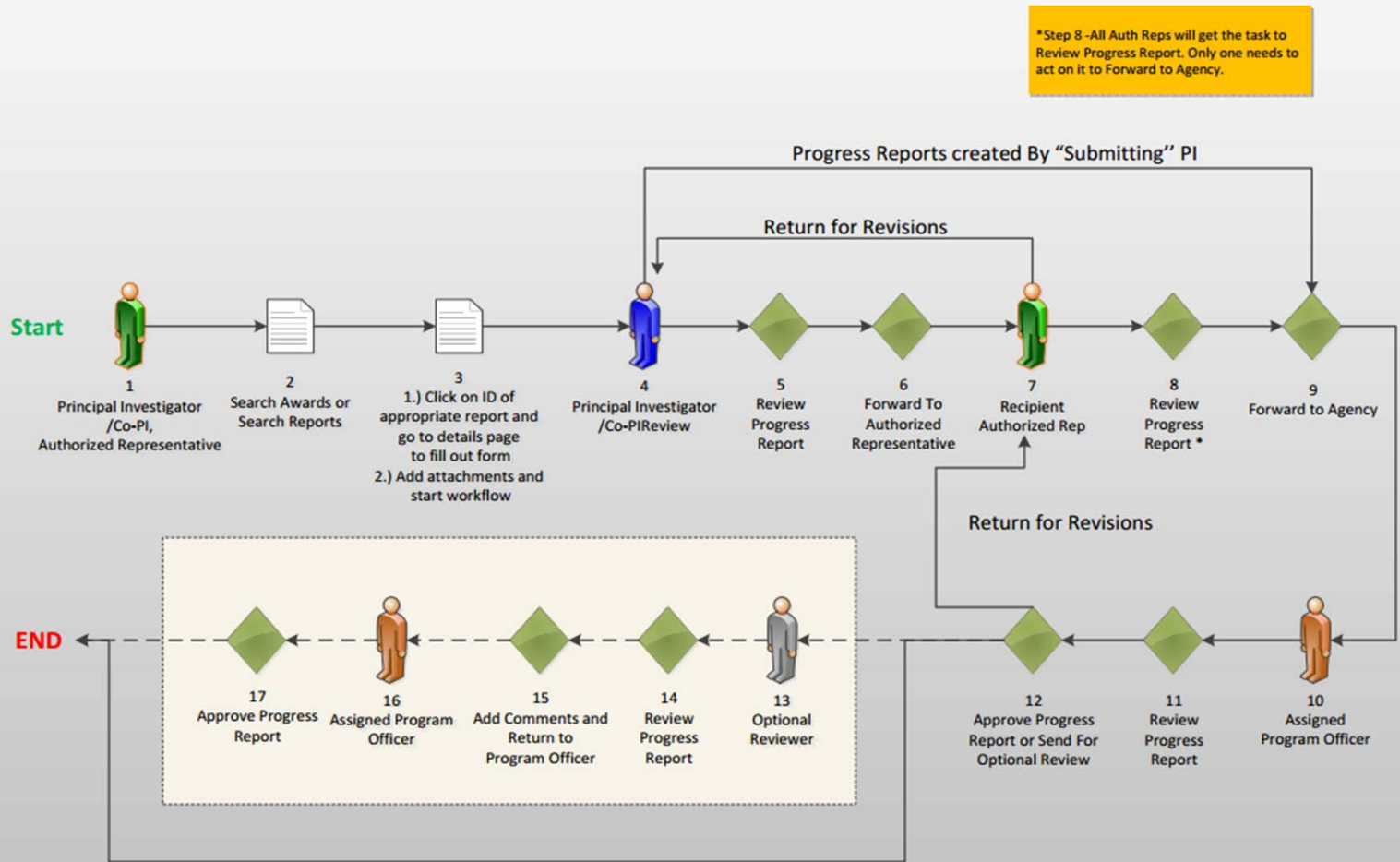
http://www.corporateservices.noaa.gov/grantsonline/Documents/AAR_Assistance/Recipient_AAR_Help.htm

Performance Progress Report (PPR)

Routing of Performance Progress Report (PPR-1)

January 28, 2016

Version 4.18



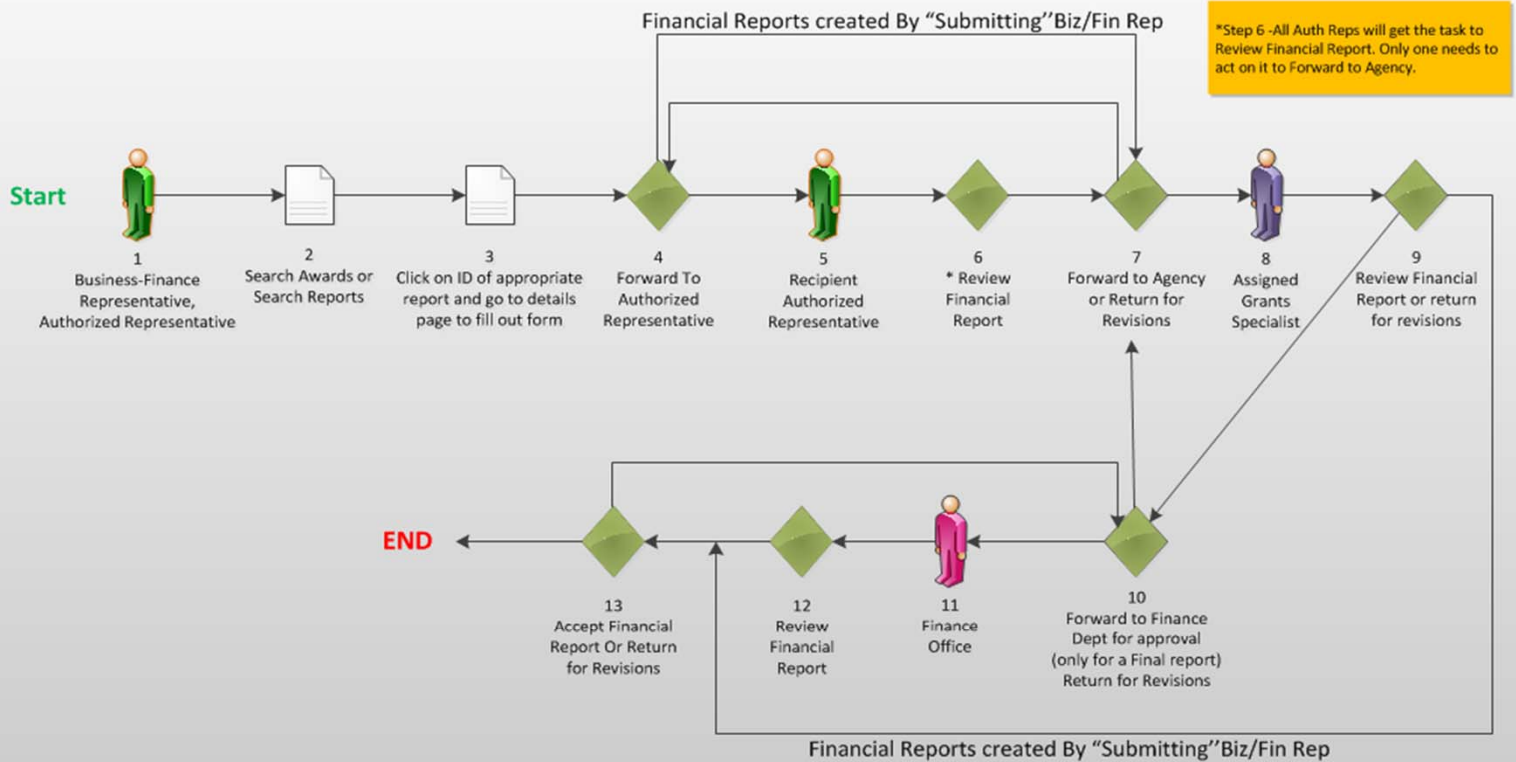
Federal Financial Report (FFR #1)

Routing of Federal Financial Reports (FFR-1)

January 28, 2016

Version 4.18

SF-425



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.

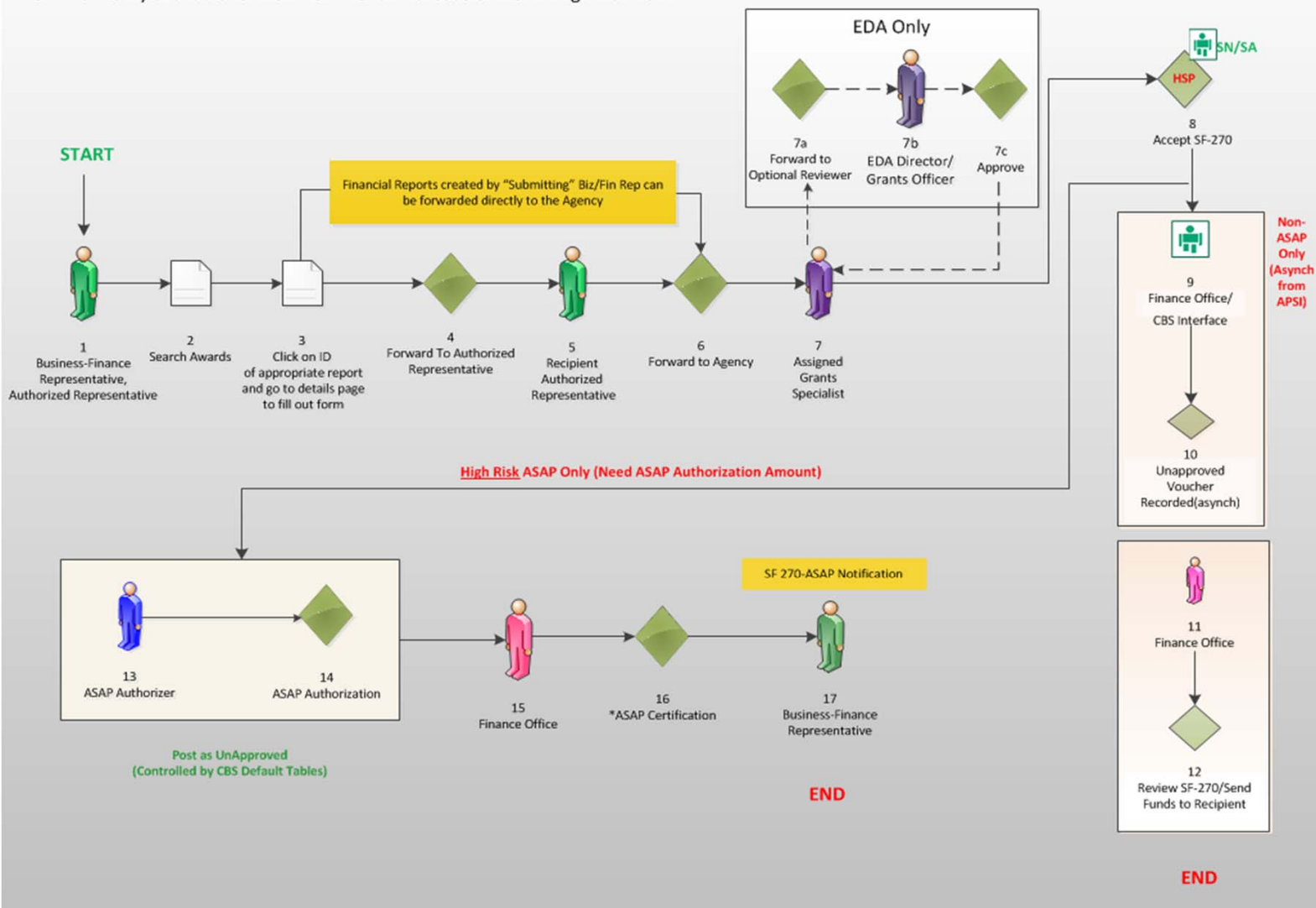
Federal Financial Report (FFR #2)

Routing of Federal Financial Reports (FFR-2)

January 28, 2016

Version 4.18

SF-270 – Only available for Non-ASAP for all Bureaus or NOAA High Risk ASAP

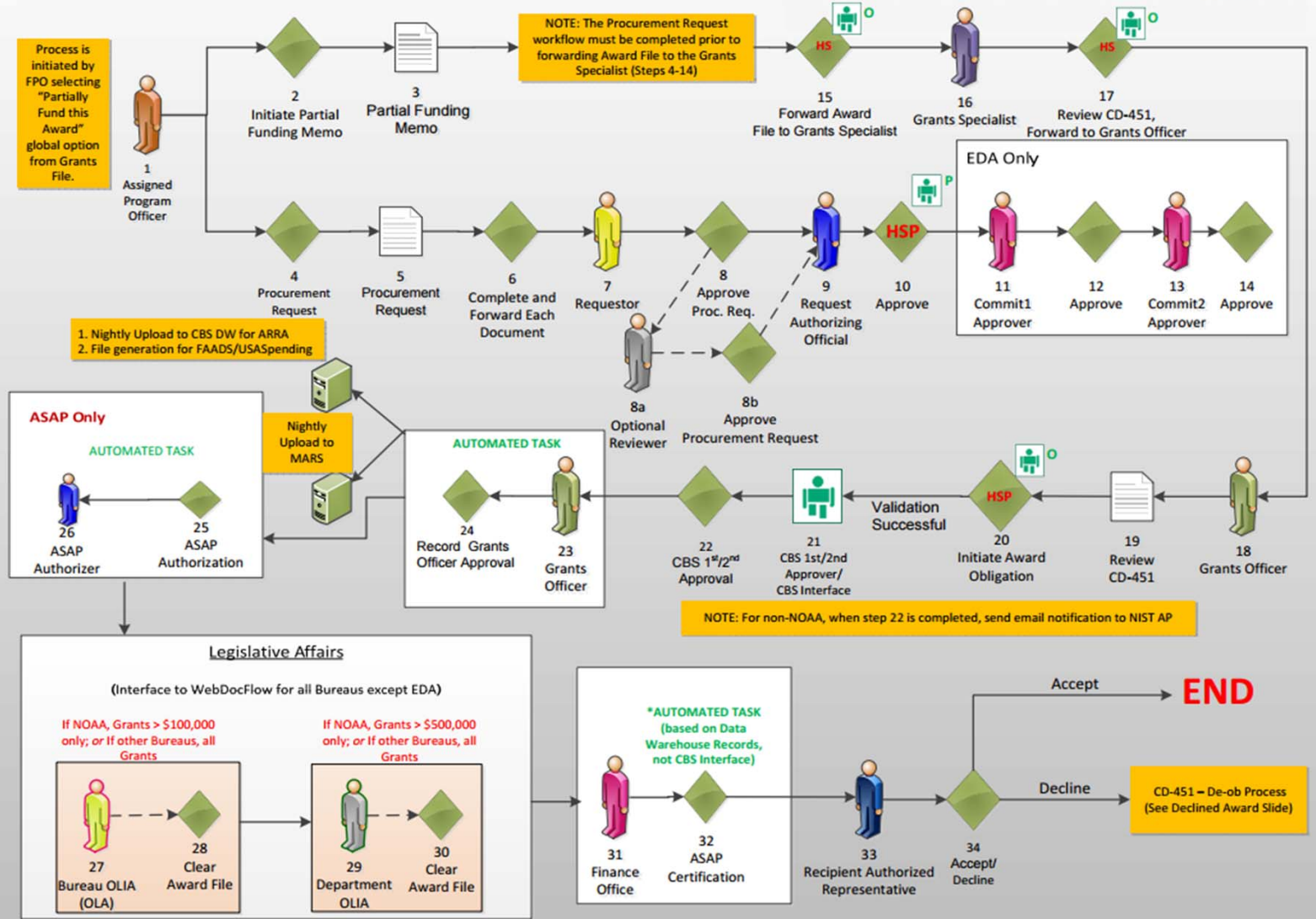


Partial Funding

Partial Funding Workflow (PR-1)

February 3, 2016

Version 4.18



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	Principal Investigator/Designated
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
NA09GOT4990034	2001932	Institute for	TEST RECORD - Grants	Accepted	None Designated

Grants File - NA09GOT4990038

Id: 2139154
Status: Accepted

Action:

Your Comments:

1. From the Award Tab, search for the Award that will be Partially Funded.
2. From the Grants File Launch Page choose **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](#)

Spell Check

Approved Plan and Prior Obligations

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

Selected Application

None

Cancel

Approved Plan and Prior Obligations

Action	Application ID	Project Title
Select	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

- 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.)
- Click the **Select** button to choose the desired application.

FPO – Partial Funding Step 6

Organization Name:	Institute for Culturally Managed Resources (ICMR)	Electronic Recipient: Yes	ASAP Recipient:
SF-425 Frequency: (after 3/31/2009)	Semi-Annual Cash Flow with Report	Frequency: 4/1/2009	
Progress Report Frequency:	Semi-Annually	n report is	
Final Reports Due On:	12/29/2012		
Project Title:	TEST RECORD - Grants Online		
Principal Investigators-Project Directors:	None Designated		

Partial Funding -- NA09GOT4990038

Memo * [Guidance](#)

Enter appropriate memo language here. See guidance.

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 * [Guidance](#)

Enter appropriate memo language here. See guidance.

Spell Check

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?

OK Cancel

Selected Application

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

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

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

Save Save and Start Workflow Cancel

- Enter the amount for Partial Funding into the “Fed Add Amount” box and, if appropriate, the amount for the “Non-Fed Amount.”
- Click **Save and Start Workflow**.
- Click **OK** on the warning message alerting the user that a Procurement Request is being added to his/her Inbox.

FPO – Partial Funding Step 10 – 11

Your Tasks

Document Type

Status

All

Open

Apply Filter >>

34 items found, displaying all items.1

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

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 Submit

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

Print Award File History

Attachments:

Pending Actions X

One item found.1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status	Last Action Date	Last Action User
Procurement Request and Commitment of Funds	214795	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.)

12. Usually, after the Procurement Request has been approved, the user can choose **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 choose **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

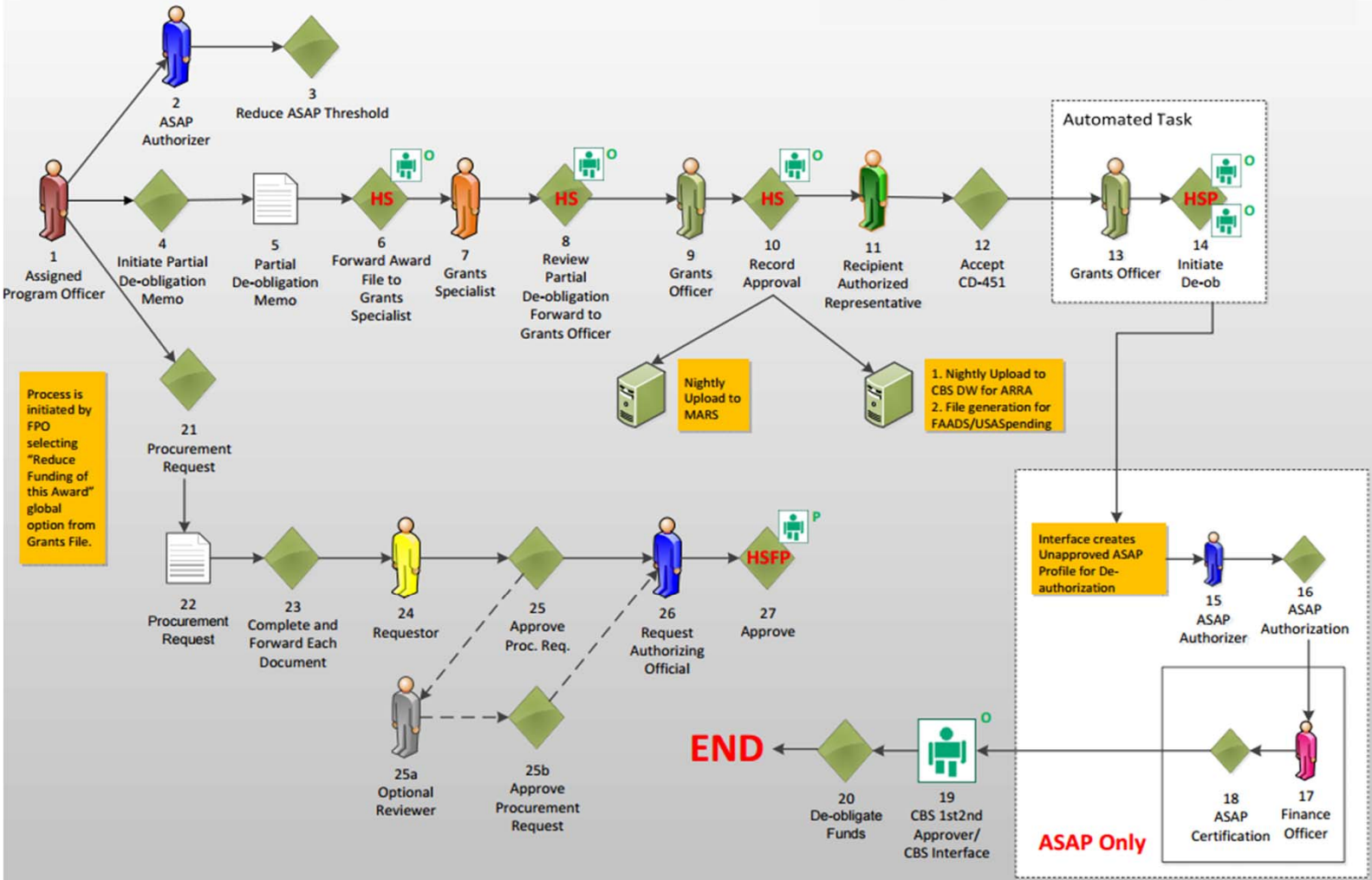
- (STANDARD) This release of funds of \$_____ is for year __ of a __ year multi-year award. All required Progress and Financial reports have been submitted and accepted.
- (EXAMPLE 2) This release... Due to _____, total funding for this award period is not available; additional funds will be provided 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.*

Reduce Funding



February 3, 2016

Version 4.18



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			
Select	2245483	For Reduction in Funding Screen Shots			
Planned Year		Approved Fed Share	Obligated	Approved Non-Fed Share	Assigned Non-Fed Share
2012		\$10,000.00	\$10,000.00	\$0.00	\$0.00

Selected Application

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

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.

01 items found, displaying all items.1

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

Last CBS Validation: Status:

Active Procurement Requests:

Nothing found to display.

Withdrawn Procurement Requests:

Nothing found to display.

Federal Share: * \$

Accounting - ACCS Lines *

One item found.1

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

[Add New ACCS Line](#)

PRCF Total for this Award action: \$-100.00

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

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 Grants Management.

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

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

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

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

Justification for De-obligation:

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

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

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.

Declined Amendment (DA)

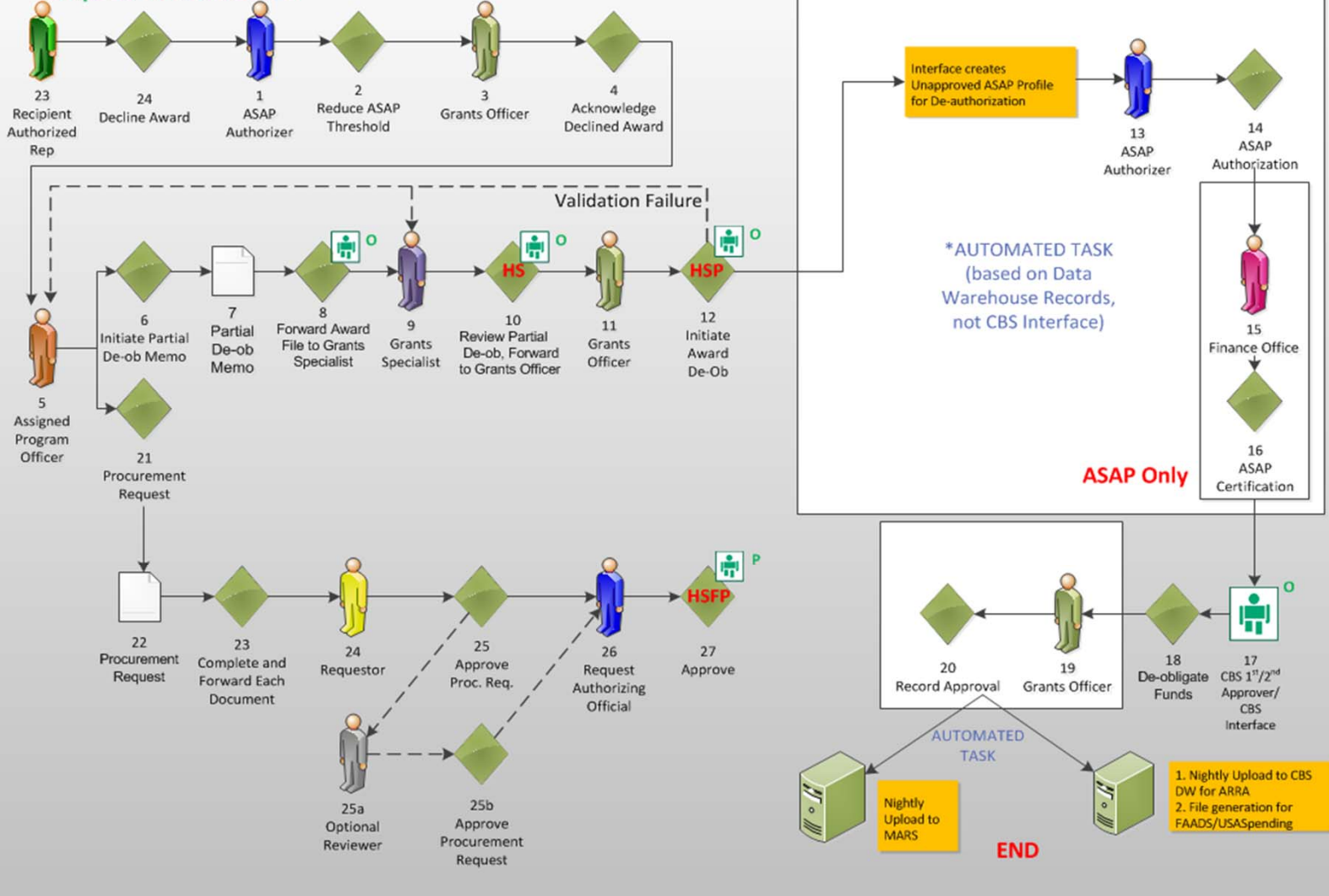
Declined Amendment Workflow (DA-2)

October 8, 2015

Version 4.17

CD-451

Steps 23-24 from GMD-1



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.

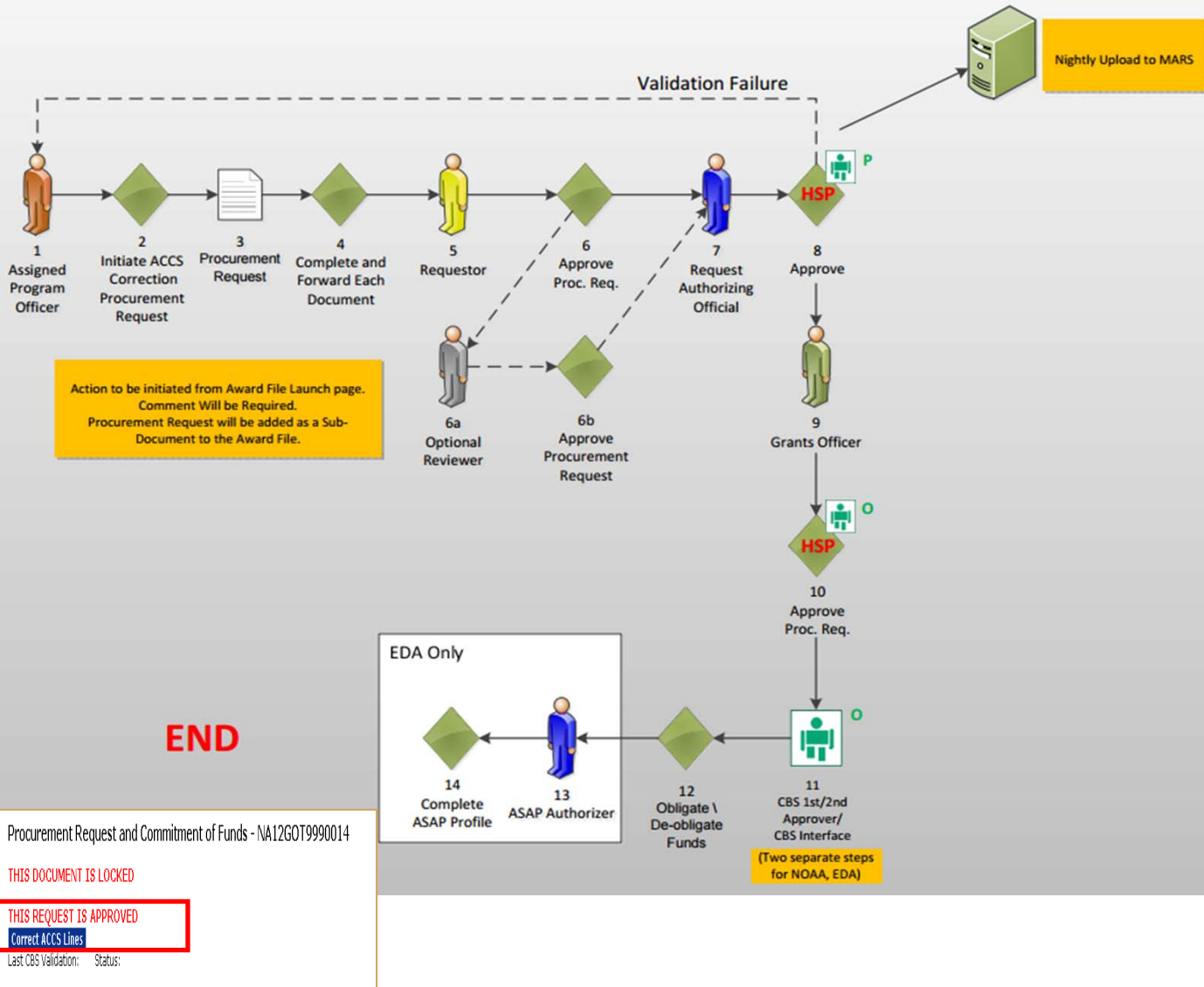
Correct ACCS Lines on an Approved Award

Correct ACCS Lines on Approved Award (PR-3)

(No Net Dollar Change)

February 3, 2016

Version 4.18



Accounting - ACCS Lines *

2 items found, displaying all items.1

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

Reference: ACCS Correction Guidance link:

http://www.corporateservices.noaa.gov/grantsonline/Documents/ACCS_Correction_Guidance.pdf

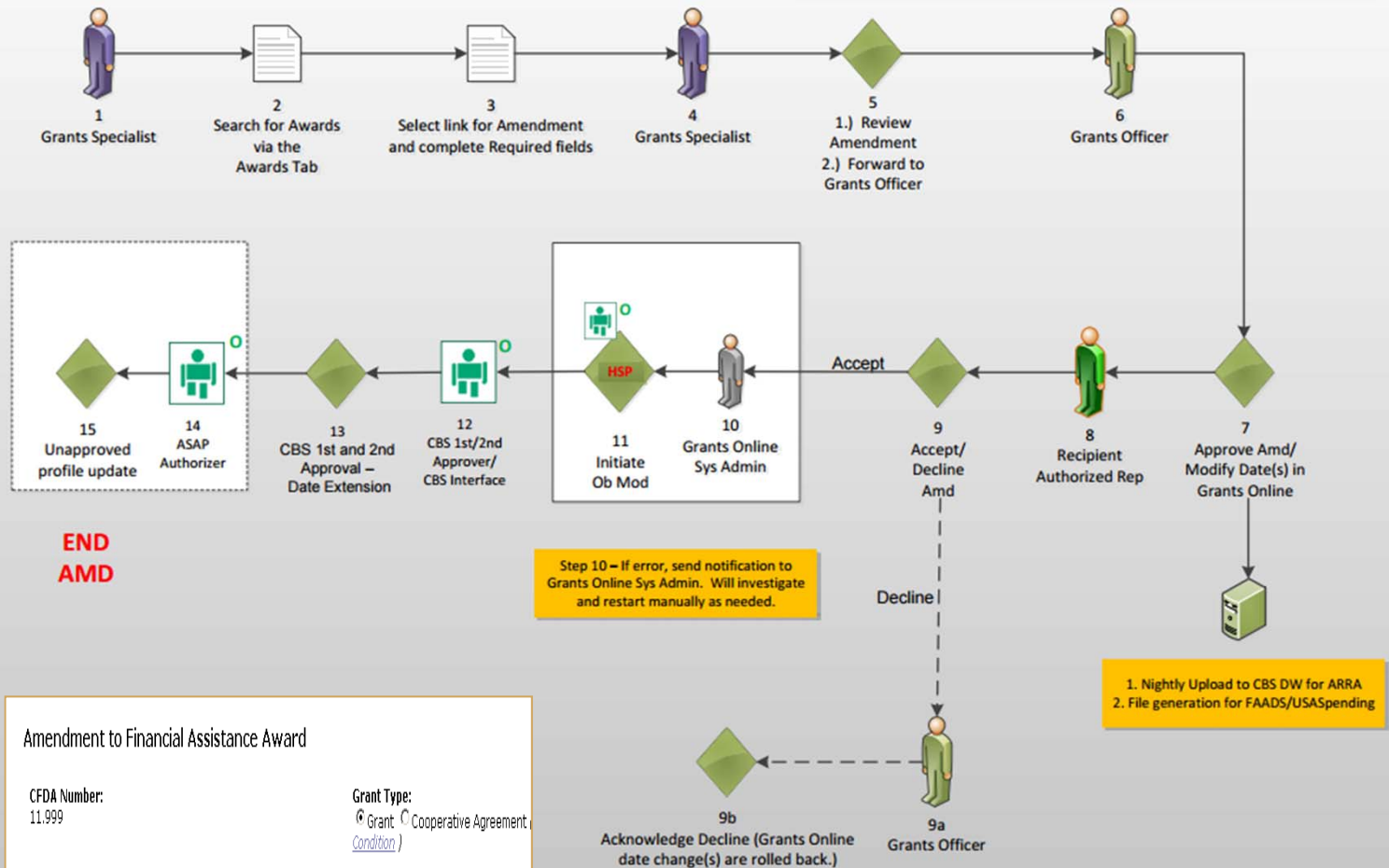
Administrative Amendment

Administrative Amendment – Date Changes (GMD-2)

October 26, 2016

Non-Funded Amendment

Version 4.20



Amendment to Financial Assistance Award

CFDA Number:
11.999

Award Number:
NA12GOT9990014

Recipient Name:
Institute for Community Managed Resources (ICMR)

Amendment Start and End Dates: *

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

Project Start and End Dates:

Grant Type:
☒ Grant ☐ Cooperative Agreement
(Condition)

Amendment Number:
Pending

Street Address:
123 Main Street
Washington, DC 20000

Extend Work Completion To:
N/A

Grants Management 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.

ASAP Enrollment Request

The screenshot shows the 'ASAP Enrollment Request' page in the Grants Online system. The header includes the Department of Commerce logo and a navigation bar with 'Inbox', 'Awards', 'Account Management', and 'Help'. A sidebar on the left lists 'ASAP Enrollment Request' (highlighted), 'Manage Recipient Users', 'SF-425A for Multiple Awards', 'Search Awards', and 'Search Reports'. The main content area displays the 'ASAP Enrollment Request' title, organization details (SKILLIGALEE INC), and a 'Point of Contact' form with fields for Name, Title, Email, and Phone Number. Below the form is an 'Attachments' section and a 'Save and Start Workflow' button.

ASAP Enrollment Request

Organization: SKILLIGALEE INC (2002987)
Request ID: 2444424

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

Organization Profile

EIN/TIN#: 98-7654321
DUNS: 068997902
Name: SKILLIGALEE INC
Type: R - Small Business
Address: 1234 MAIN ST
Berlin, MD 20076

Point of Contact

Name *
Title *
Email *
Phone Number *

Attachments:

No attachments.

Add new Attachment: [\[+\]](#)
Any changes to information on this page should be saved before adding or removing attachments. File name should be less than 255 characters.
[Large File Guidance](#)

Save **Save and Start Workflow** **Cancel** **Print**

NOAA Only: 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

NOTE: As a result of the Digital Accountability and Transparency Act (DATA Act) recipients must update their organization profile in SAM.gov. Grants Online now receives a daily extract from SAM.gov that will automatically update the organization's profile in Grants Online.