

# Grants Online Competition Manager's Quick Reference Guide

If you follow these instructions carefully, you should not have any problems with making competitive awards.

## 1. Create and Publish the RFA

- a. Competition(s) for RFA: Every competitive RFA must contain a Competition document in Grants Online for every competition that is being run under that RFA. Make sure that the Competition document is created in Grants Online BEFORE the RFA is published.
- b. Review Event for Competition: Every Competition in Grants Online must contain one and only one Review Event document. The Review Event in Grants Online is a work around to allow workflow to successfully complete while you conduct external review events. Grants Online has set up default values for the review event. Use these values and do not attempt to change them, although you can change the Review Event dates to match your expected time frame. Your actual review events will be different. Make sure that the Review Event document is created in Grants Online BEFORE the RFA is published.
- c. Publish: Create the RFA publication documents (FRN/FFO) and get them published.

## 2. Manage the Review Event

- a. Reviewer Instructions: Immediately upon publication of the Federal Funding Opportunity, the RFA Creator will receive a task to "Review Reviewer Instructions". It is Department of Commerce policy that all Reviewer Instructions be reviewed by the Federal Assistance Law Division (FALD) before the reviewers receive these instructions. This review must be done in Grants Online so that there is evidence that the review took place. When your instructions are ready (for all review events in the competition), attach them to the Review Event document and forward to FALD for review. This should be completed prior to the due date for your applications.
- b. Applications Minimum Requirements: Before the review event starts, make sure that all applications submitted for the competition are entered under the competition, including ALL paper applications. Review the Minimum Requirements for all submitted applications. All applications in the Review Event must be evaluated for passing minimum requirements before the task to "Confirm Review Event" will be available.
- c. Confirm Review Event: Seven days prior to the Review Event Start Date (that you filled out on the Review Event details page), the Competition Manager will receive a task to "Confirm Review Event". You can confirm the Review Event before or after the actual external review events have taken place. ALTERNATIVE: If the Confirm Review Event task has not appeared in your inbox for some reason, e.g. it is more than 7 days prior to the review event start date; you can navigate to the Review Event launch

page and select the “Initiate Confirm Review Event” from the workflow drop down near the top of the page. This will place the “Confirm Review Event” task in your inbox.

- d. Close Review Event: The day after the Review Event End Date (that you filled out on the Review Event details page), the Competition Manager will receive a task to “Close Review Event”. You can close the Review Event before or after the actual external review events have taken place. ALTERNATIVE: If the Confirm Review Event task has not appeared in your inbox for some reason, e.g. it is earlier than the review event end date; you can navigate to the Review Event launch page and select the “Initiate Close Review Event” from the workflow drop down near the top of the page. This will place the “Close Review Event” task in your inbox.

### 3. Select Applications

- a. Select Applications: Immediately after you execute the “Close Review Event”, the Select Applications task will appear in your inbox. At this point you may need to wait until your actual external review event processing catches up. You should begin the process of creating the Selection Package documents and have them reviewed outside of Grants Online by the Selecting Official prior to completing the initial selection of applications.
- b. Selecting Official Review: Once the Selecting Official is happy with the application selections, they will choose the workflow option to “Initiate PO Negotiations”. This will create a task to Conduct Negotiations for each application’s assigned Program Officer for every selected application.
- c. WARNING: There is a “global” workflow drop down to “Select Applications” on the Competition launch page that continues to be available after the Select Applications task has left the Competition Manager’s inbox. DO NOT select this option just because you don’t know what else to do. This option is available for the selection of additional applications after the initial Selection Package workflow is complete. It will reset the workflow to the Select Applications task for the Competition Manager. If you choose this option by mistake, you (and others) will need to re-execute steps that have already been executed.
- d. Assign Award Numbers and Associate Recipients: The task name for this is “Conduct Negotiations”, but that is not what is supposed to happen here. You can conduct negotiations with the applicant if desired at this point (and you probably should if you intend to provide significantly different Federal funding than that applied for). There are three things that must occur at this step. Once completed, the Program Officer will choose the option to “Forward to CM for Selection Package”. The items that MUST be completed for each application are:
  - i. Assign Award Number
  - ii. Associate Grants Online Organization

- iii. Associate Recipient Authorized Representative (Note: Other documentation describes the reasons for these requirements.)

#### **4. Manage Selection Package**

- a. Attach Selection Package Documents: After the last application selected for funding has the “Forward to CM for Selection Package” executed, the Competition Manager will immediately get a task for “Competition Manager Review Selection Package”. The Selection Package will be a new sub-document under the Competition. Chapter 8 of the [DOC Grants Manual](#) describes the required documents. Attach these Selection Package documents to the Grants Online Selection Package.
- b. Review Selection Package: The Selection Package review path is from the Competition Manager to the Selecting Official who approves the Selection Package in Grants Online. From the Selecting Official, it goes to FALD. If the FALD attorney is satisfied with the Selection Package, they will choose a “No Legal Objection” workflow action. Choosing this action will generate, for every selected application, an Award File and all of the necessary Award File sub-documents to be associated with the application, as well as appropriate tasks. NOTE: What is described in this document is the “happy path”, i.e. everybody did everything right and nobody has any issues that need to be addressed. In reality, this seldom occurs. Accordingly, every workflow path has options to return the document back to the previous person.

#### **5. Complete Award File Documents**

- a. Complete Award File Documents: At this point, the unique competitive part of the process is over. Once the Award File and documents are created, the application’s assigned Program Officer will receive tasks on the PO Checklist, the Procurement Request, and (for NOAA and NTIA only) the NEPA document.

### **Re-Selection of Applications**

It often happens that a selected application will subsequently be withdrawn or not funded for some other reason. There are also occasions where the expected funding for a competition is increased beyond what was originally expected for funding. In these situations, there is a need for the Competition Manager to select additional applications for funding after the selection package has been reviewed (and “No Legal Objection” has been executed) by FALD.

In order to accomplish this “re-selection of applications” after the workflow for the Selection Package is complete, Grants Online provides a “global” workflow action for the Competition Manager on the Competition launch page to “Select Applications”. Choosing this action re-starts the “Select Applications” workflow at step 3.a above. At the Selection Package step, additional documents will need to be added to the original Selection Package for the expansion of the selections.