Grants Online Training
Grants Online – CBS Interface

Federal Program Officers

May 2012

New and Updated Processes Related to the Grants Online-CBS Interface

Overview

DEMO - Prepare Applications for Funding

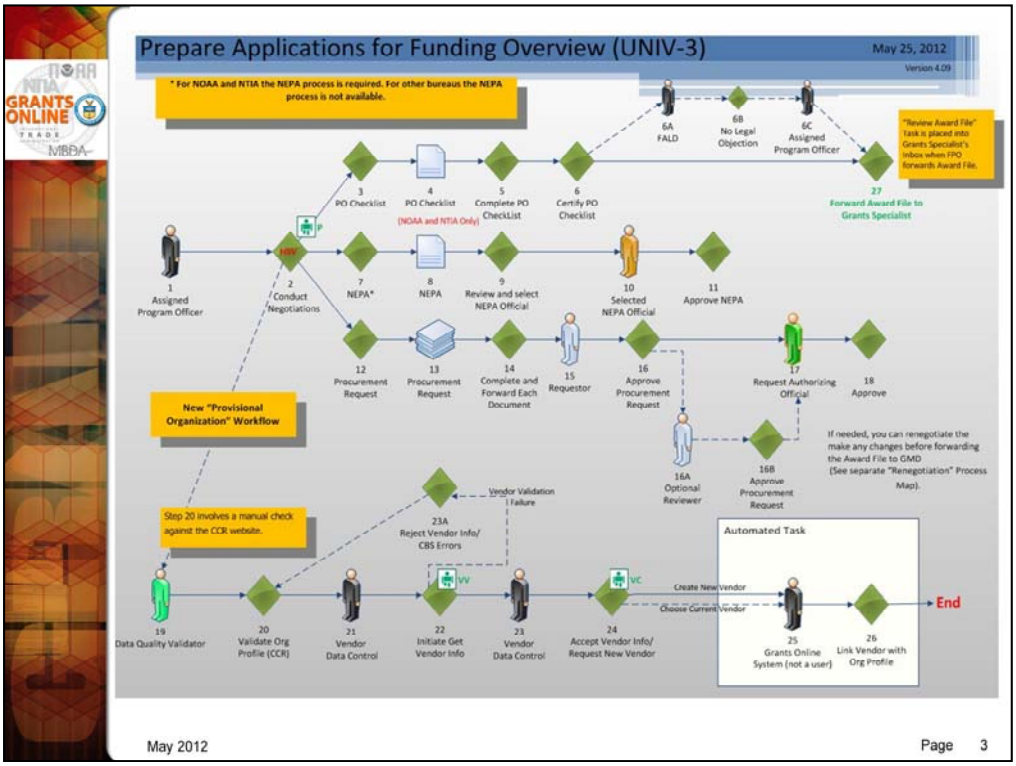
1. Conduct Negotiations
   a. Org Lookup – Searching for an Organization
   b. Org Lookup – Entering a New Organization
2. Provisional Org Workflow
3. PO Checklist
4. Procurement Request
   a. Current Funds
   b. Prior Year Funds

DEMO - Post Award Processes

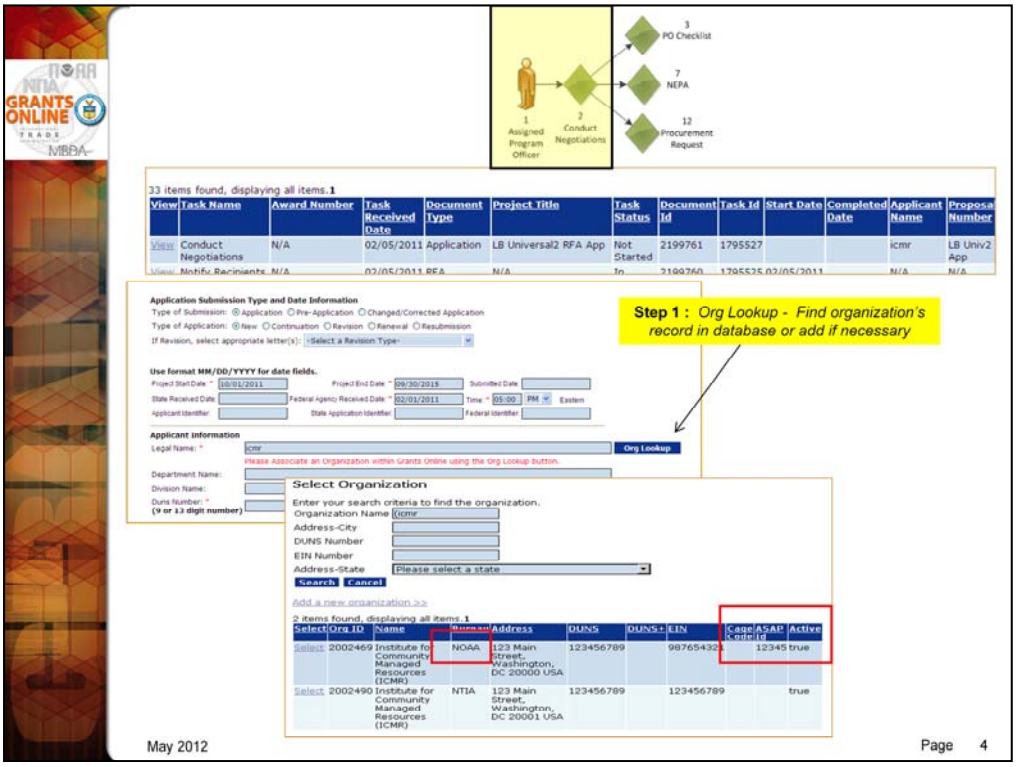
1. Reduction in Funding
2. Declined Amendment
3. Correction to ACCS Lines
4. Admin Amendment for Date Changes (GMD)
5. Organization Profile Change Requests
   a. Non ASAP to ASAP
   b. Organizational Profile Updates

KNOWN ISSUES

Questions & Answers



The Grants Online Process Maps are being updated. The new maps will be posted to the Training website for the go-live date of the release. This map (UNIV-3) displays the workflows involved in the preparation of an award package to send to the Grants Management Division. There is a new workflow process at the bottom of the map called "Provisional Organization". As a part of implementing the Grants Online-CBS interface, this workflow was added to link the application with a CBS vendor earlier in the workflow than before the interface. Making the link at this point in the process facilitates a quicker obligation process once the award is approved by the Grants Officer. The users involved in this new workflow include the Data Quality Validator who is on the staff of the Grants Online Program Management Office, and the Vendor Data Control user who is in the Finance Office's Accounting Operations Division. This workflow is only generated by the system if the Federal Program Officer selects the option to enter an new organization into the system. If the Federal Program Officer selects an organization already linked to CBS by an earlier award then the Provisional Organization workflow will not be generated.



Additional information will now be displayed in the Organization search results.

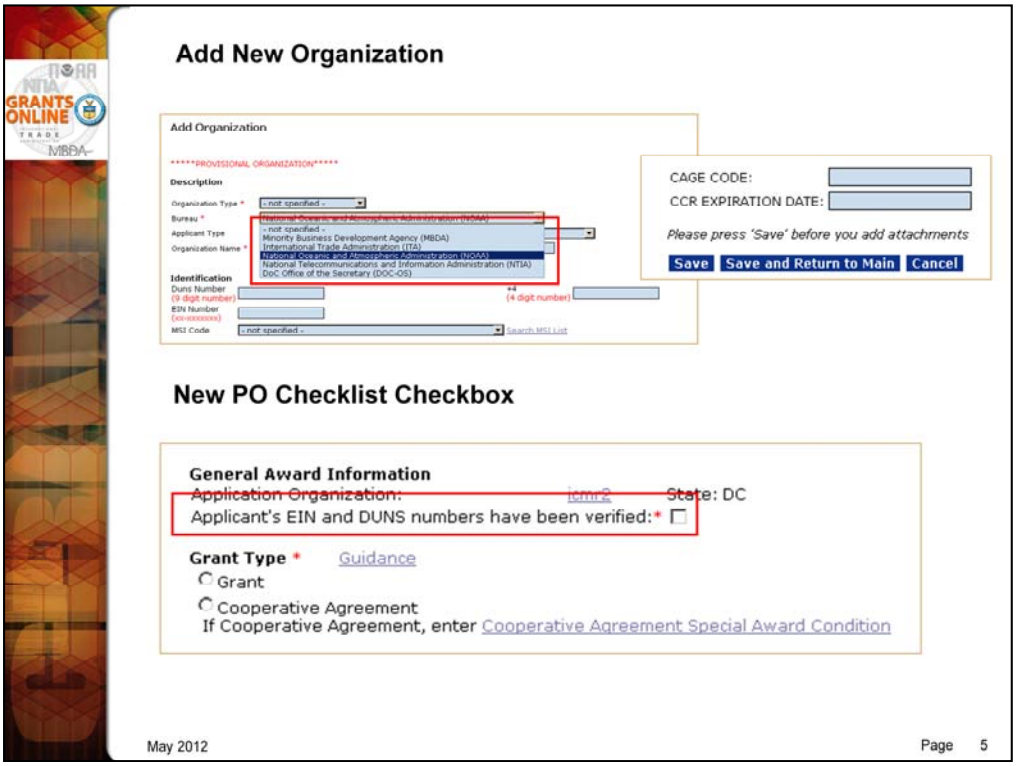
1. It is important to select an organization for your Bureau. If the organization that you would like to use is displayed in the search results but is associated with a different Bureau, you will need to enter a new record for your Bureau.
2. An additional identifier on the Organization Profile called the "Cage Code*" will be returned in the search results. The Cage Code is a data field from the Central Contractor Registry.
3. Only active records will be returned in the search results. If for some reason an organization is marked as inactive in the Grants Online database it will not show up in the search results even though it may be associated with a current award or closed award. For example, when an organization converts from non-ASAP to ASAP, the non-ASAP record will be made inactive so that it cannot be selected for a new award. If there are any closed awards for that organization, they will remain associated with the non-ASAP record but the active ones will become associated with the ASAP record.
4. 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.

***WHAT IS A CAGE CODE?**

CAGE Code is a five (5) position code that identifies companies doing or wishing to do business with the Federal Government. The format of the code is the first and fifth position must be numeric. The second, third and fourth may be any mixture of alpha/numeric excluding alpha letters I and O.

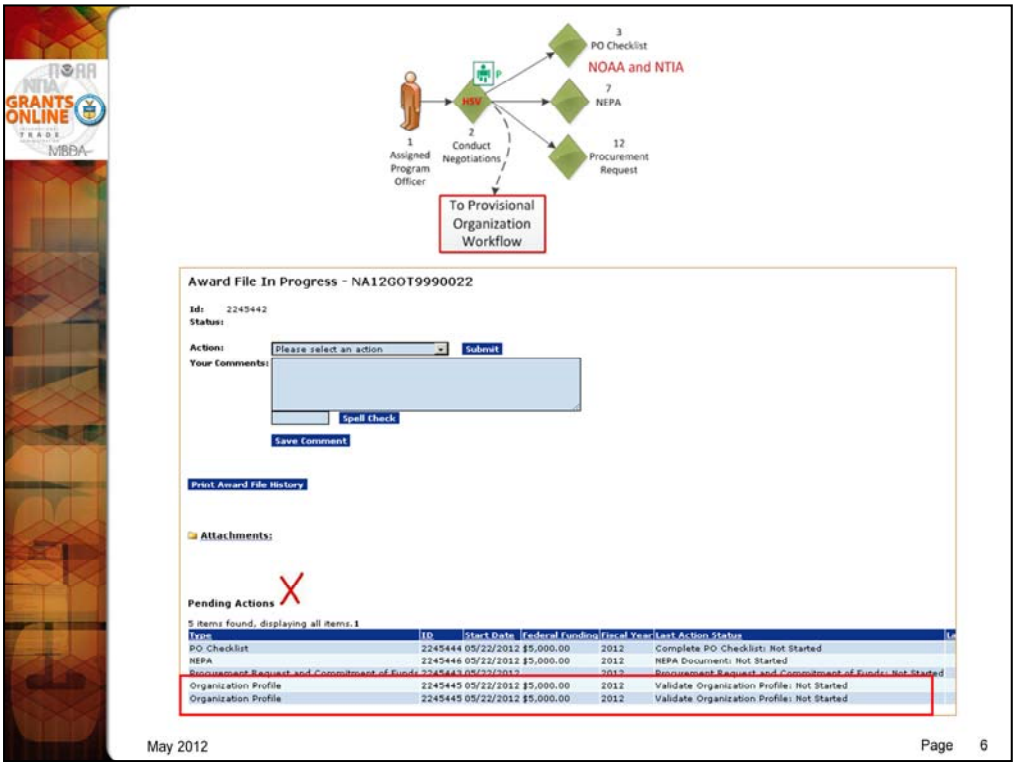
***WHY DO I NEED A CAGE CODE?**

The code is used to support a variety of mechanized systems throughout the government. The code provides for a standardized method of identifying a given facility at a specific location. The code may be used for a Facility Clearance, a Pre-Award survey, automated Bidders Lists, pay processes, source of supply, etc. In some cases, prime contractors may require their sub-contractors to have a CAGE Code also.



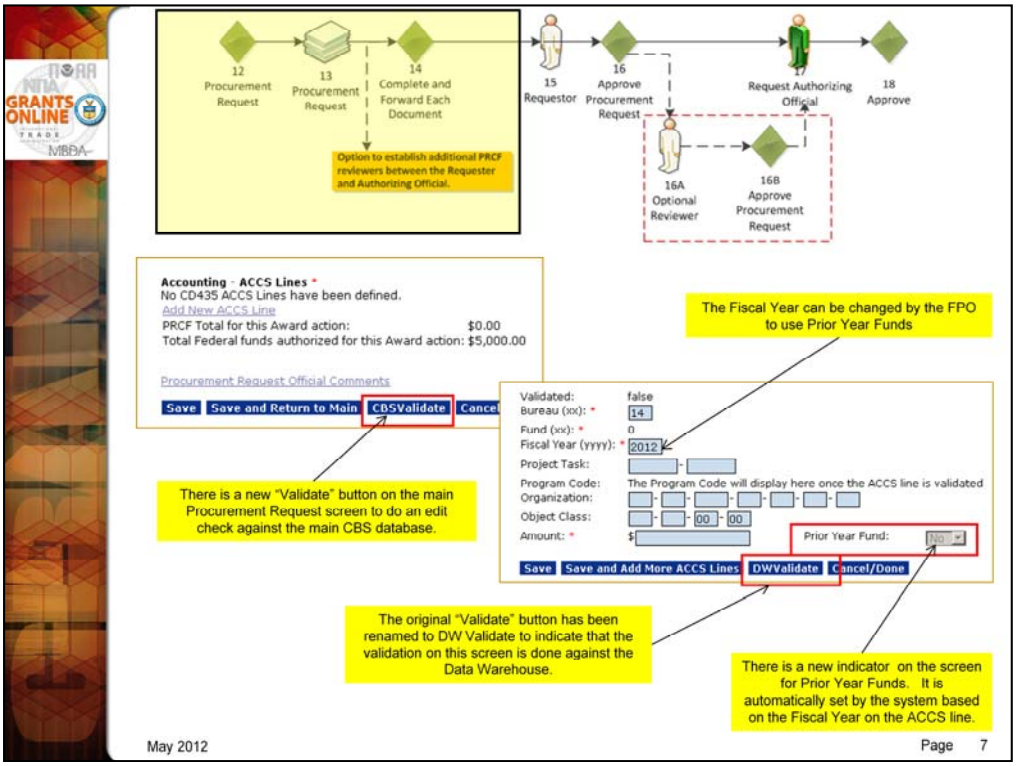
When adding a new organization you must now select your Bureau at the top of the page. If you have the organization's CAGE CODE it can be entered at the bottom of the page.

On the PO Checklist there is one new item. A required checkbox has been added so you can indicate if you have verified the EIN and DUNS number that the recipient entered on the submitted application. (There have sometimes been typos in the EIN or DUNS number on the application which have led to inaccuracies in the organization's profile information as well as contributing to the grant being linked to an incorrect vendor in the CBS system.) The ideal time to check this information is during the "Conduct Negotiations" (Universal) or "Assign Award Number/Recipient" (Competitive) step.



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

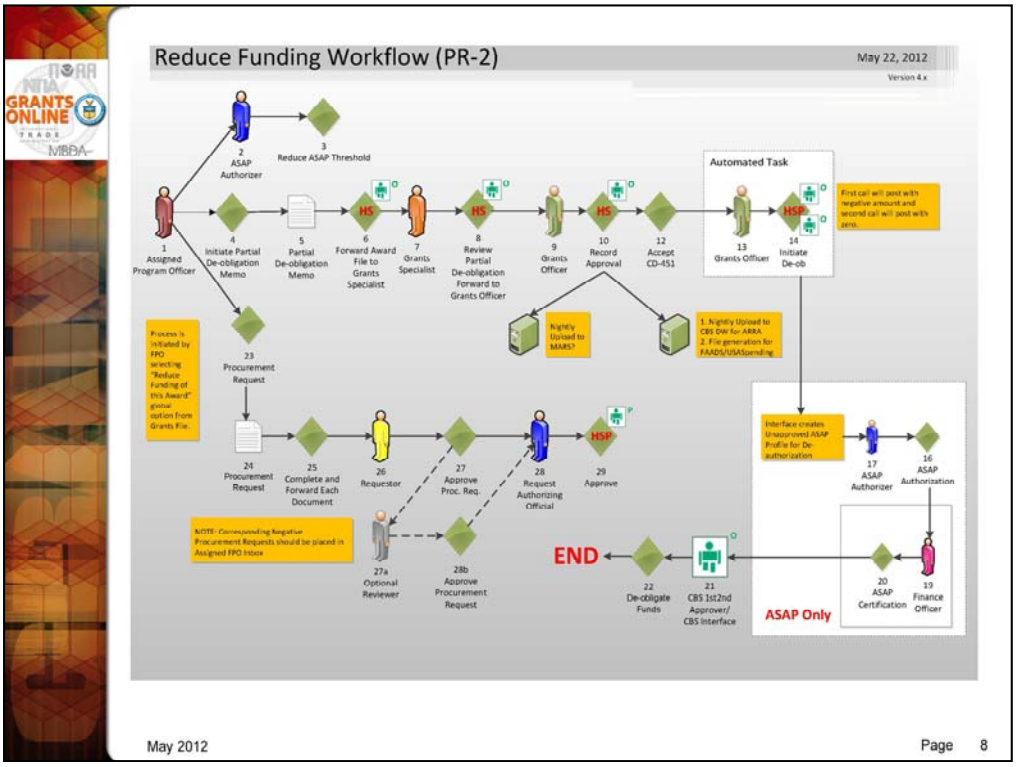
Until the Provisional Organization workflow is completed, the FPO will not have an option to Certify the PO Checklist and the Budget Officer will not have an option to Approve the Procurement Request.



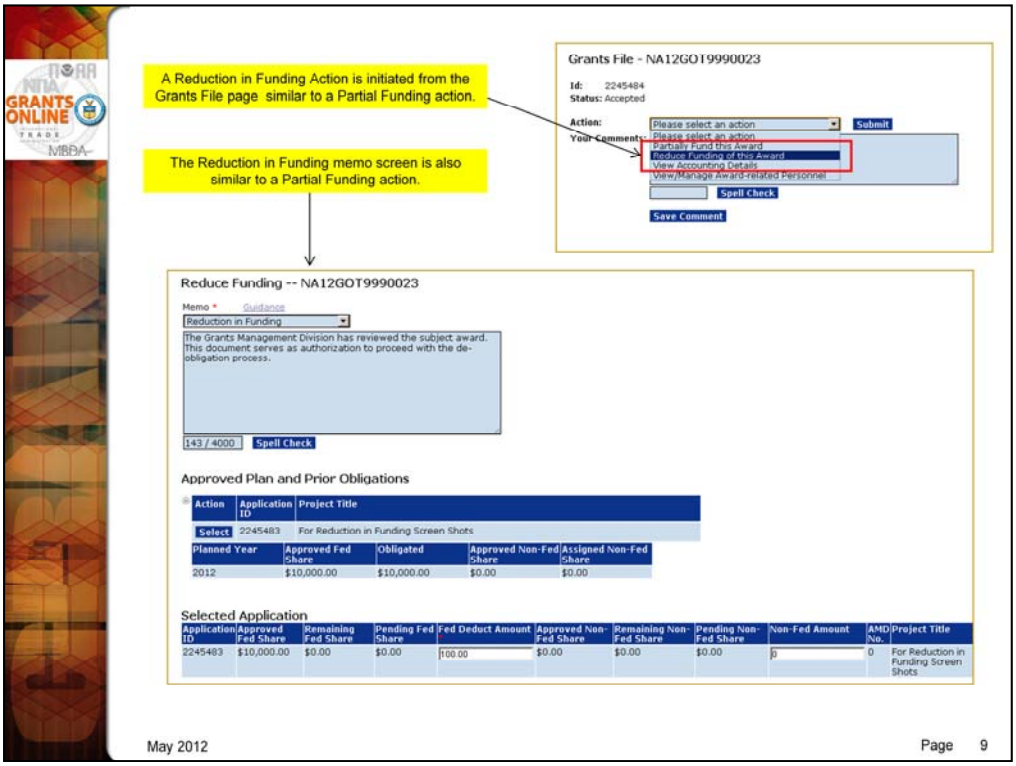
There is a new "CBSValidate" button on the main Procurement Request screen. After entering the ACCS line(s), this button can be used to do a funds check for sufficient funds. It will also check the validity of each component of the ACCS line as well as check to see if the organization has been linked to a valid Vendor in CBS. The CBS validation status will appear at the top of the Procurement Request screen. If there is an edit check that does not pass, a CBS Error screen will be displayed explaining the cause of the validation failure.

There are three new features on the ACCS Line data entry screen for the Procurement Request.

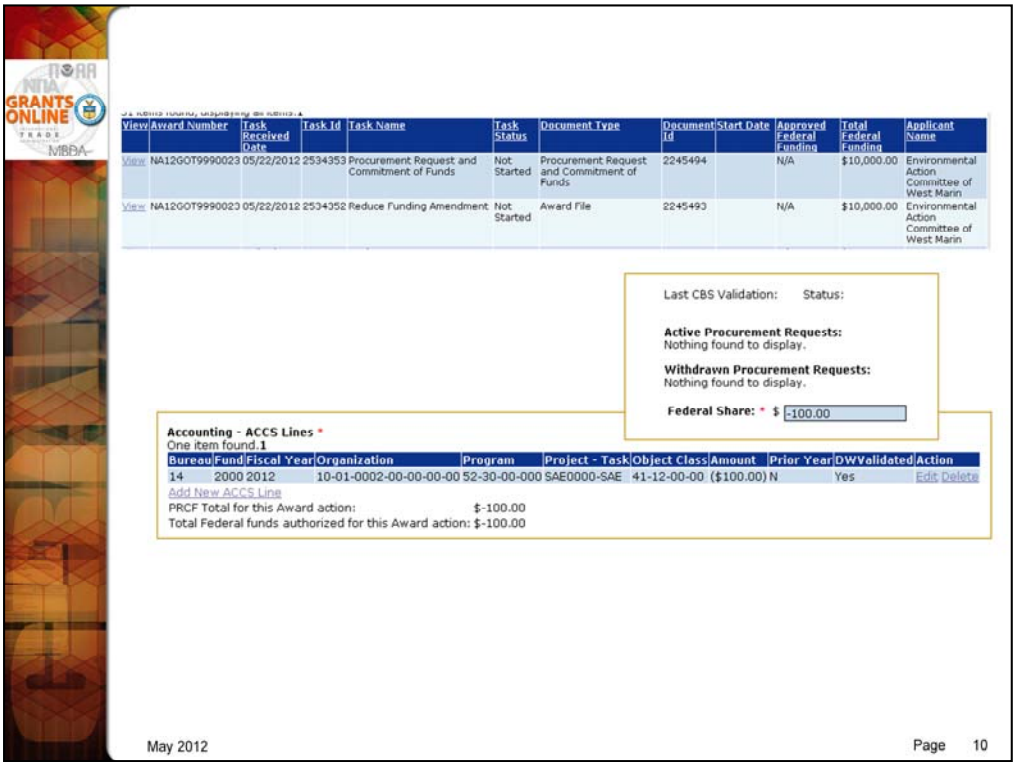
1. The "Fiscal Year" field is now a data entry field. It will default to the current fiscal year but can by changed by any user with edit rights on this screen.
2. The "Prior Year Fund" indicator is automatically set by the system based on the data in the "Fiscal Year" field.
3. The "Validate" button has been renamed to "DWValidate" to distinguish it from the new "CBSValidate" button on the main Procurement Request screen. The "DWValidate" button uses the data entered into the "Project" and "Task" fields to retrieve the correct "Program Code" to fill in the full ACCS line.



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



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



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	NA12G0T9990023	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	NA12G0T9990023	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: * $ -100.00

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

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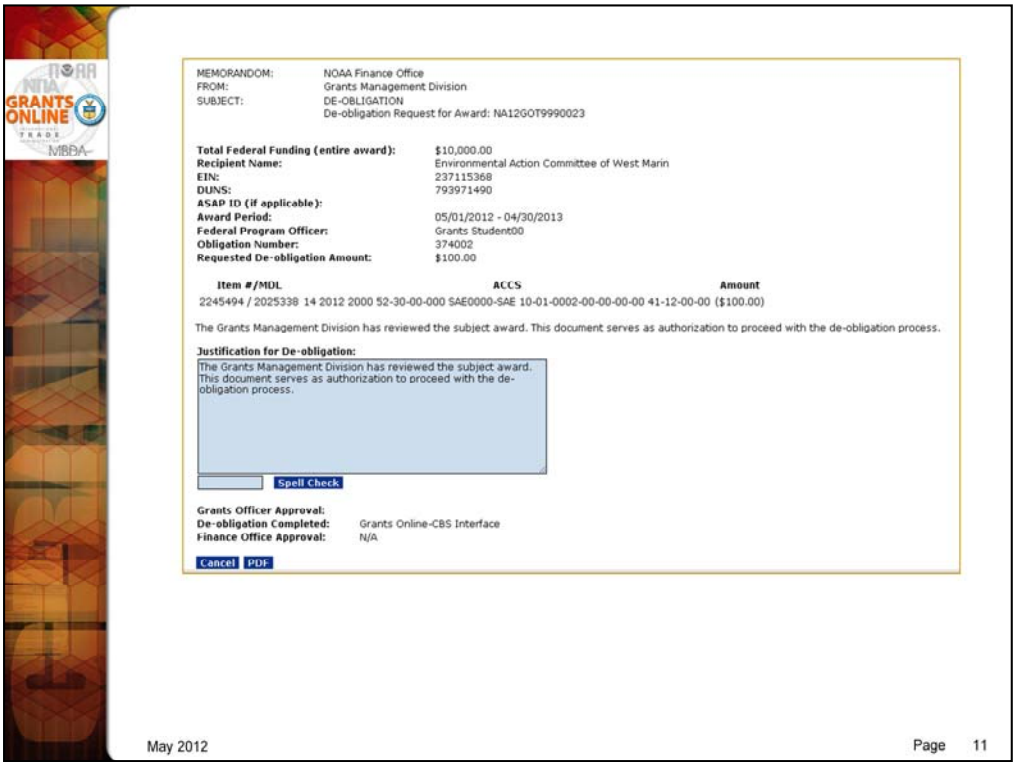
Just like with a Partial Funding, two tasks are generated in the FPO inbox. The Procurement Request must be filled out using negative numbers for the funding reduction, and the workflow must be completed by the Authorizing Official (Budget Officer role) in order to be able to forward the action to the Grants Management Division.



MEMORANDOM: 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.

Spell Check

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

Cancel PDF

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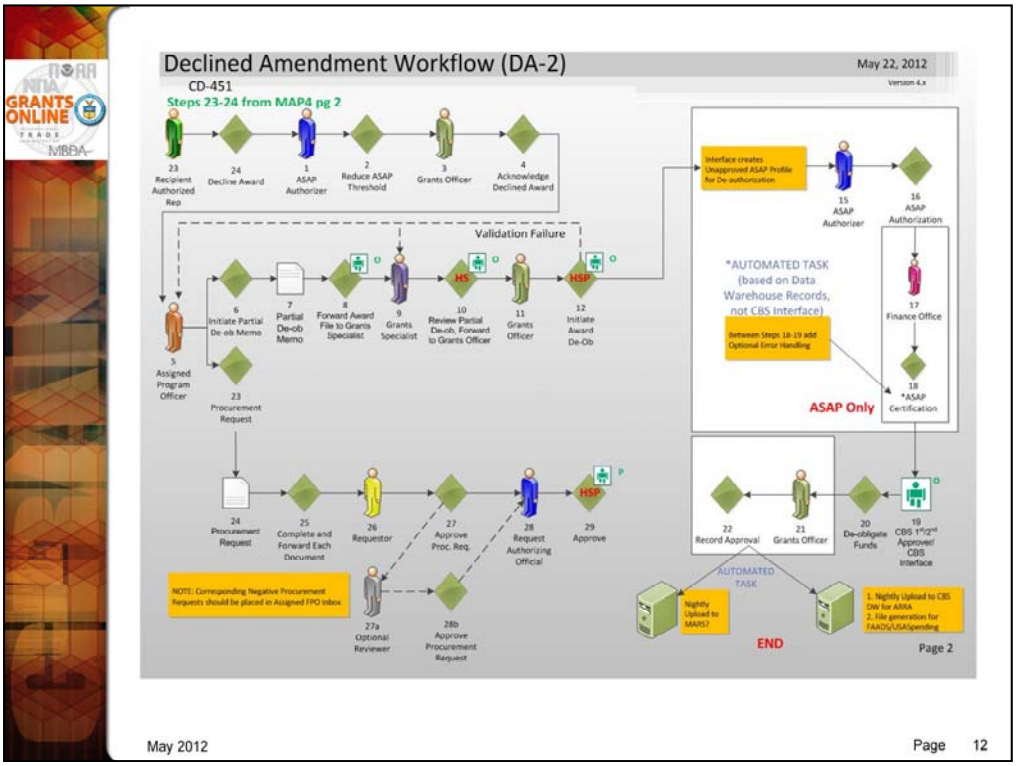
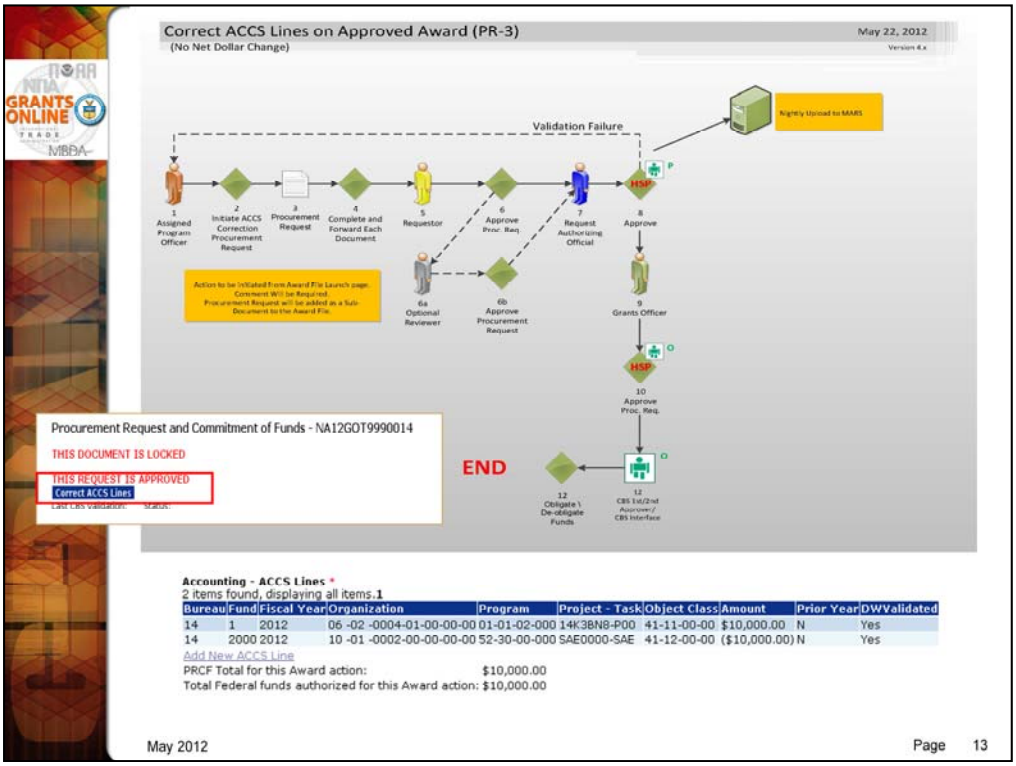
The Award File for a Reduction in Funding contains a de-obligation memo to document the de-obligation by the system via the interface. In the case of a non-Interfaced award the workflow will flow through the Finance Office to manually approve the de-obligation memo. There is no activity required by the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

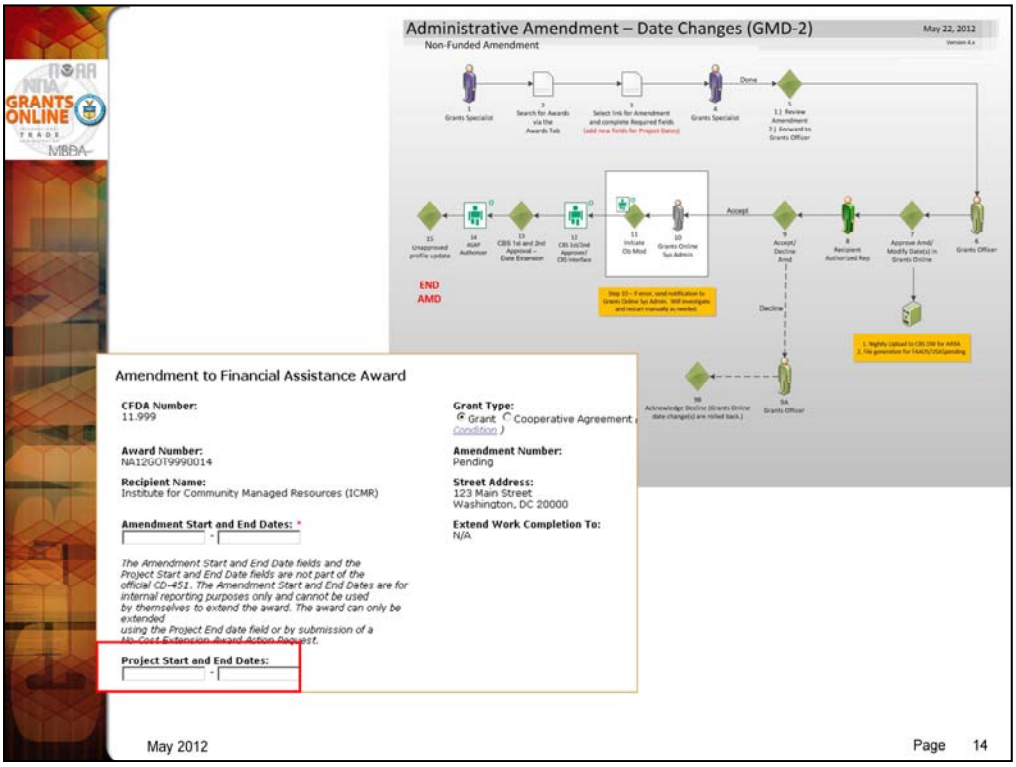


For a FPO, the Declined Amendment workflow looks just like a Reduction in Funding except that the tasks are generated when the Grants Officer acknowledges the declined award as opposed to the Federal Program Officer initiating the action.



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

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



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

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

Known Issues for Training

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

Q&A