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**Grants Online Training  
Grants Online – CBS Interface**

**Federal Program Officers**

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**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***

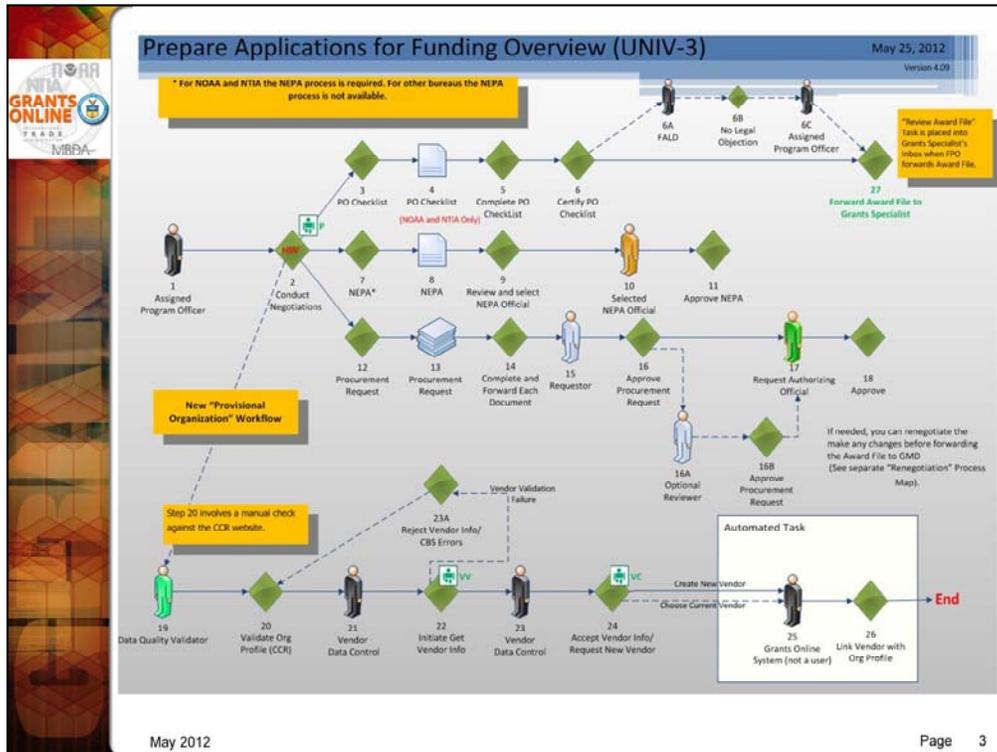
1. Reduction in Funding
2. Declined Amendment
3. Correction to ACCS Lines
4. Admin Amendment for Date Changes (GMD)
5. Organization Profile Change Requests
  - a. Non ASAP to ASAP
  - b. Organizational Profile Updates

#### ***KNOWN ISSUES***

#### ***Questions & Answers***

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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 a 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.

The screenshot shows the Grants Online interface. At the top left is the logo for NFIA GRANTS ONLINE TRADE MBDA. A workflow diagram shows steps: 1 Assigned Program Officer, 2 Conduct Negotiations, 3 PO Checklist, 7 NEPA, and 12 Procurement Request. Below this is a table of 33 items found, displaying all items. The table has columns: View, Task Name, Award Number, Task Received Date, Document Type, Project Title, Task Status, Document ID, Task ID, Start Date, Completed Date, Applicant Name, and Proposal Number. One row is visible for 'Conduct Negotiations' with Award Number N/A, Task Received Date 02/05/2011, Document Type Application, Project Title LB Universal2 RFA App, Task Status Not Started, Document ID 2199761, Task ID 1795527, and Applicant Name icmr.

The main form is for 'Application Submission Type and Date Information'. It includes fields for Project Start Date (05/01/2011), Project End Date (06/30/2015), State Received Date (05/01/2011), Federal Agency Received Date (05/01/2011), Applicant Identifier, and State Application Identifier. Below this is the 'Applicant Information' section with a 'Legal Name' field containing 'icmr' and an 'Org Lookup' button. A yellow callout box points to this button with the text: 'Step 1: Org Lookup - Find organization's record in database or add if necessary'. Below the 'Org Lookup' button is the 'Select Organization' section with fields for Organization Name (icmr), Address-City, DUNS Number, EIN Number, and Address-State. A 'Search' button is also present.

Below the search form is a table of 2 items found, displaying all items. The table has columns: Select, Org ID, Name, Address, DUNS, DUNS + EIN, Cage/ASAP, and Active. Two rows are visible: one for 'Institute for Community Managed Resources (ICMR)' with Org ID 2002469, Name Institute for Community Managed Resources (ICMR), Address 123 Main Street, Washington, DC 20000 USA, DUNS 123456789, DUNS + EIN 98765432, Cage/ASAP 12345, and Active true; and another for 'Institute for Community Managed Resources (ICMR)' with Org ID 2002490, Name Institute for Community Managed Resources (ICMR), Address 123 Main Street, Washington, DC 20001 USA, DUNS 123456789, DUNS + EIN 123456789, Cage/ASAP, and Active true.

At the bottom left of the page is 'May 2012' and at the bottom right is 'Page 4'.

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.

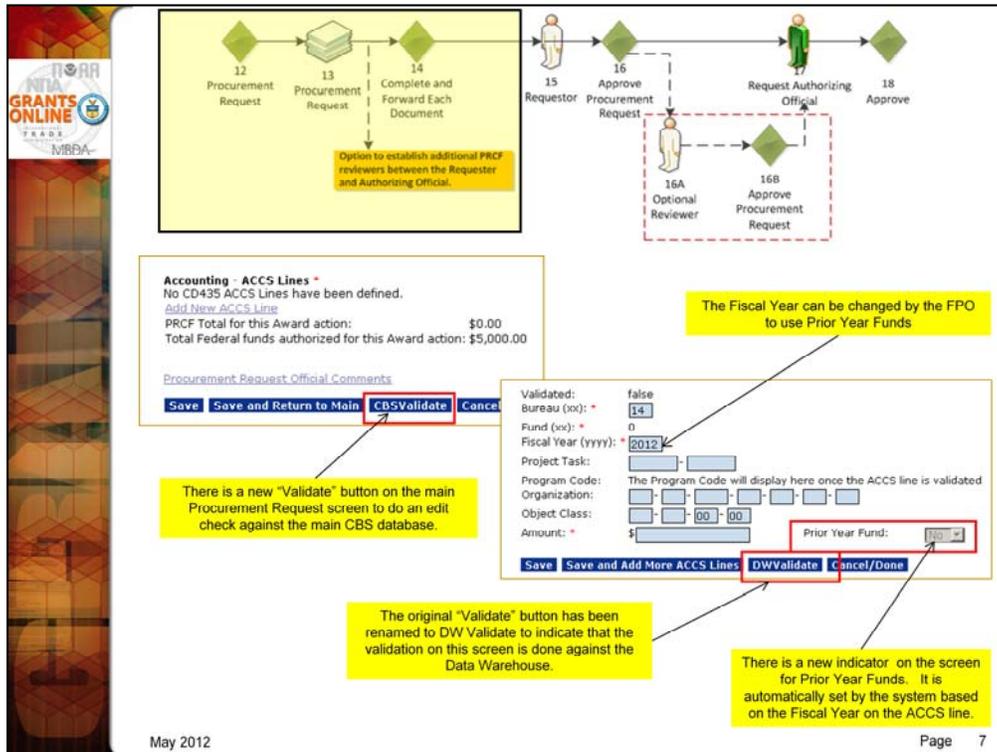
The screenshot displays the Grants Online interface. At the top, a workflow diagram shows the process starting with an 'Assigned Program Officer' (1) who 'Conducts Negotiations' (2). From step 2, the workflow branches into three parallel paths: 'PO Checklist' (3), 'NEPA' (7), and 'Procurement Request' (12). A red box labeled 'To Provisional Organization Workflow' is positioned below step 2, indicating a transition point. The main content area shows an 'Award File In Progress - NA12GOT9990022' with fields for ID (2245442) and Status. Below this are sections for 'Action:' (with a dropdown menu and 'Submit' button), 'Your Comments:' (with a text area, 'Spell Check', and 'Save Comment' buttons), and 'Attachments:'. A 'Pending Actions' section is marked with a red 'X' and contains a table of pending tasks.

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

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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 be 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.



**Grants File -- NA12GOT9990023**  
 Id: 2245484  
 Status: Accepted

Action:    
 Your Comment:

**Reduce Funding -- NA12GOT9990023**

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

143 / 4000

**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

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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.

The screenshot displays the NFA Grants Online interface. On the left is a vertical sidebar with the NFA Grants Online logo and MBDA branding. The main content area features a table of tasks and a summary box.

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

Last CBS Validation:      Status:

**Active Procurement Requests:**  
Nothing found to display.

**Withdrawn Procurement Requests:**  
Nothing found to display.

**Federal Share:** \* \$

**Accounting - ACS Lines \***  
One item found: 1

Bureau/Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWV	Validated	Action
14	2000 2012	10-01-0002-00-00-00-00	52-90-00-000	SAE0000-SAE	41-12-00-00	(\$100.00)	N	Yes		<a href="#">Edit</a> <a href="#">Delete</a>

[Add New ACS 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.



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)

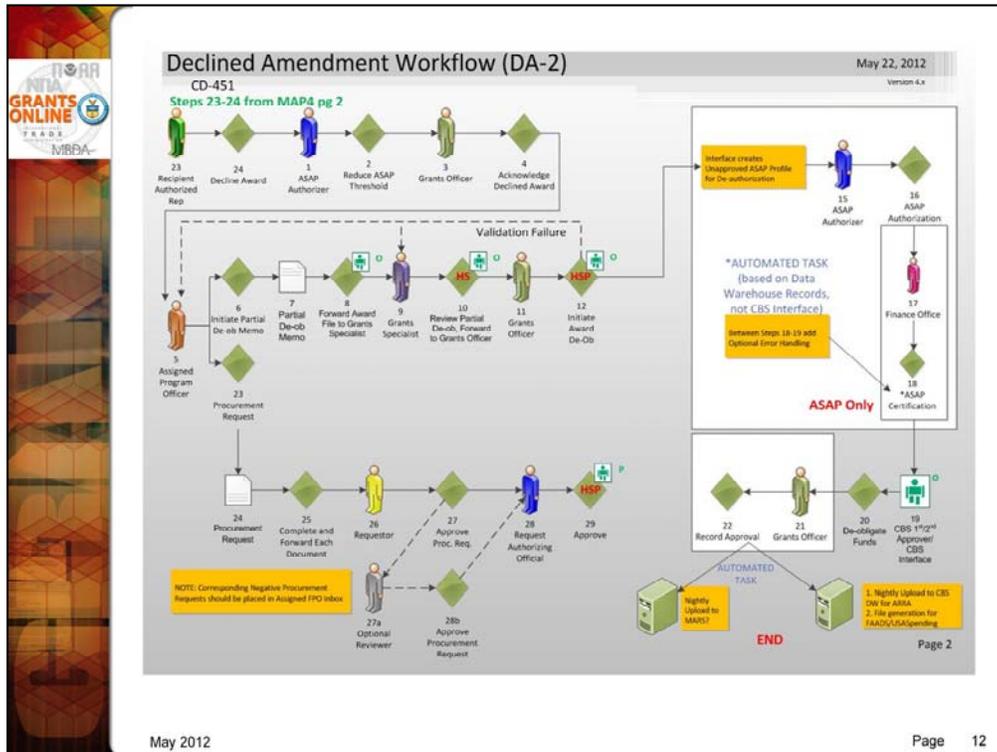
The Grants Management Division has reviewed the subject award. This document serves as authorization to proceed with the de-obligation process.

**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

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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.

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

May 22, 2012  
Version 4.x

Procurement Request and Commitment of Funds - NA12GOT9990014

THIS DOCUMENT IS LOCKED

THIS REQUEST IS APPROVED  
Correct ACCS Lines

Accounting - ACCS Lines \*  
2 items found, displaying all items.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DW	Validated
14	1	2012	06 -02 -0004-01-00-00-00	01-01-02-000	14K:3BN8-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 Lines  
PRCF Total for this Award action: \$10,000.00  
Total Federal funds authorized for this Award action: \$10,000.00

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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.



NOAA GRANTS ONLINE

Inbox Awards Account Management Help

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

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

\*Justification for Changes

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



## Known Issues 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