Grants Online Training
Grants Online – CBS Interface

Grants Specialists and Grants Officers

May 2012
New and Updated Processes Related to the Grants Online-CBS Interface

DEMO – GMD Review and Approval Process
1. Current Year Funds (Using New Award)
   a. Adding a new Organization
   b. New PO Checklist Question
2. Prior Year Funds

DEMO - Post Award Processes
1. Declined New Award
2. Declined Amendment
3. Reduction in Funding
4. Correction to ACC’S Lines
5. Admin Amendment for Date Changes (GMD)
6. No-Cost Extensions
7. Organization Profile Change Requests
   a. NonASAP to ASAP
   b. Organizational Profile Updates
8. Change in High Risk
9. SF-270 Process (ASAP – High Risk Recipients)
10. ASAP Drawdown Request AAR (Agency Review Recipients)
11. Closeout

Q&A
When adding a new organization the FPO must now select the correct Bureau at the top of the page. If the organization has a CAGE CODE it should be entered at the bottom of the page. The FPO can check to see if a Cage Code is required by doing a look up at the Central Contractor Registry site. There is a link on the “Add Organization” page to access that site. If multiple Cage Codes are found, the applicant needs to be contacted to obtain the correct one since it is not a data field on the SF-424. This should be done in conjunction with the verification of the EIN and DUNS numbers listed on the application which is a new checkbox on the PO Checklist.

On the PO Checklist a required checkbox has been added so the FPO can indicate if the EIN and DUNS number that the recipient entered on the submitted application has been verified. (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, especially if a new organization is being used.
For the Program Office 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.
For awards to new organizations, the Grants Specialist is encouraged to click on the View/Manage Recipient Organization link to confirm that the correct Bureau has been associated with the organization record linked to the award.
Grants Specialists and Grants Officers can perform the same CBS Validations as Federal Program Officers except they will use the “CBS Validate” buttons found at the bottom of the CD-450 and Amendment screens.
This Sample Error Message contains a several informative statements, with only one being an actual error:

Line 1 states that the Vendor Validation passed.

Lines 2 and 3 indicate there was a problem with the Task Code on the ACCS line.

Lines 4 and 5 indicate that the system correctly detected that Prior Year funds were being used.
When Prior Year funding is being used, the Grants Officer will need to coordinate their award approval with Maria King in the Finance Office. Maria will need documentation from the Line Office stating that the appropriate clearances have been obtained before she allows a grant action using Prior Year funds to get approved in CBS. Additionally, the CBS system is only put into “Override Mode” on Wednesdays between 3-4pm. When CBS is in “Override Mode” other non-prior year awards will not be able to be signed by the Grants Officer because CBS will produce an error message. GMD and the Finance Office had some preliminary discussions during the last working group meeting regarding establishing a standard operating procedure; however, it has not yet been finalized.
If an award is declined by the recipient, the extraneous CBS Approver task will be automatically closed for interfaced awards. For non-interfaced awards the task should be manually closed by the CBS Approver and then the Help Desk should be notified in order to remove the Closeout date from the Award File. The Award still needs to go through a Financial Closeout process to de-obligate the funds via the interface using the de-obligation memo.
The Declined Amendment workflow looks just like a Reduction in Funding except that the De-obligation Memo and De-obligating Procurement Request are generated when the Grants Officer acknowledges the declined award as opposed to the Federal Program Officer initiating an action. The Declined Amendment workflow will not be an “Award File in Progress” but will have the amendment number of the Declined Amendment.
The Reduction in Funding workflow follows a very similar process as 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.
Just like with a Partial Funding, two tasks are generated in the FPO inbox.
ACCS Information for the Partial De-obligation Memo is retrieved via the Interface based on the fields entered on the Procurement Request.
To make a correction to the ACCS line on an already approved award:

1. Navigate to the details page of the Procurement Request that needs to be corrected.
2. Click on the “Correct ACCS” button. This will generate a new “zero-dollar” Procurement Request.
3. Edit the ACCS line to make the amount (or portion of the amount) negative.
4. Add one or more positive ACCS lines to make a net balance of zero on the Procurement Request.
5. Start the workflow for approval of the 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.
For No Cost Extensions, since project date updates are now going to be updated at CBS the workflow will go through the CBS approval process. For ASAP awards a task will go to the ASAP Authorizer to update the ASAP profile with the new date.
### Organization Profile Change Request

**Organization:** Institute for Community-University Research (ICUR)  
**Recipient ID:** 2145577

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**Applicant Type:** Institute of Community-University Research

*Indicates required for changes
To change the High Risk indicator for an organization:

1. Search for an Award associated with the organization.
2. Click on the “Org_ID” link next to the Award Number in the Search Results.
3. Change the High Risk radio button as appropriate.
4. If the organization is ASAP the system will generate a task for the Authorized Representative to de-authorize or authorize the remaining funds based on the High Risk status. (No action is needed for a non-ASAP organization.)
The option to submit a SF-270 is now only available to Non-ASAP recipients and to NOAA High Risk ASAP recipients. A new Award Action Request has been created for ASAP Recipients on the Agency Review process who wish to inform the agency that a drawdown request has been submitted in ASAP. (See ASAP Drawdown Request AAR.)
Sample De-obligation Memo for Closeout.