Grants Online Training

For CENSUS* Users

**We will soon be adding Census to the Grants Online logo.*

June 2016

Federal Program Officer Training Agenda – Census

All times are approximate and will be adjusted as needed. Breaks will also be inserted as needed.

Day 1

Grants Online Overview and System Navigation Universal RFA Creation / Application Processing		
Introduction and Agenda	ALL	8:30 – 8:45
Grants Online Overview	ALL	8:45 – 9:00
Review of Roles and Responsibilities	ALL	9:00 – 9:30
Login and Account Management	ALL	9:30 – 9:45
Creating a Universal (Non-Competitive) RFA - *with Review Event*	Federal Program Officer (RFA Creator) Legal/FALD (Optional)	9:45 – 10:45
Inputting a Paper Application	FPO (Cert and Uncert)	10:45 – 11:15
Application Review Process (Using the Review Module)	FPO-Certified Merit Reviewers	11:15 – 11:45
LUNCH		11:45 – 1:00
Conducting Negotiations	FPO (Cert and Uncert)	1:00 – 1:30
Award Package Processing – PO Checklist	FPO (Cert and Uncert)	1:30 – 2:15
Award Package Processing – Procurement Request and Commitment of Funds (PRCF)	FPO (Cert and Uncert) Budget Officer (Certifying Official) Finance Office (whoever does commitments) Whoever else needs to review package before it goes to NOAA (legal?)	2:15 – 3:00
GMD Approval, Obligation, and OLIA	FPO-Cert (to understand process) CBS 1st and 2nd Approvers OLIA	3:00 – 4:00
Day 1 Wrap Up: Additional Resources / Questions		4:00 – 4:30

Day 2

Broad Agency Announcement (BAA) RFA Creation and Application Processing		
Review of the BAA Concept	FPO (Cert and Uncert) Legal (Optional)	8:30 – 8:45
Creating a Competitive BAA RFA	FPO (operating as RFA Creator)* FPO (operating as Assigned Program Officer)* Legal/FALD * Can be the same person	8:45 – 10:30
Creating the associated Universal BAA RFAs	FPO (operating as RFA Creator)	10:30 – 11:30
LUNCH		11:30 – 1:00
Receiving and Routing BAA Applications / Selection Pkg	FPO (Cert and Uncert)	1:00 – 2:00
Processing BAA Applications (Min Requirements thru OLIA)	FPO (Cert) Other roles optional	2:00 – 3:30
Accept Award *(Recipient Action)*	FPO (Cert and Uncert)	3:30 – 4:00
Day 2 Wrap Up: Questions		4:00 – 4:30

Day 3

Post Award Processing		
Award Action Requests	FPO (Cert)	8:30 – 9:00
Progress Reports	FPO (Cert and Uncert)	9:00 – 9:30
Financial Reports	FPO (Cert and Uncert)	9:30 – 9:45
Partial Funding Action (Multi-Year Awards)	FPO (Cert and Uncert)	9:45 – 10:30
Review of Additional Post Award Processes: - Organization Profile Changes via SAM.gov - Reduce Funding - De-obligate Declined Amendment - Correct Accounting Classification Code Structure (ACCS) Lines on Approved Award o ***Reference #19 on the PMO website*** - Correct Award Dates (Administrative Amendment) o ***Grants Specialist must initiate action to make the correction*** - Supplementary Information - Correspondence and Federal Reports	FPO (Cert and Uncert)	10:30 – 11:30
Wrap Up: Questions and Course Evaluation		11:30 – 12:00*

** If needed session will continue after lunch*

Grants Online Overview

June 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 business processes that contribute to a more efficient 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

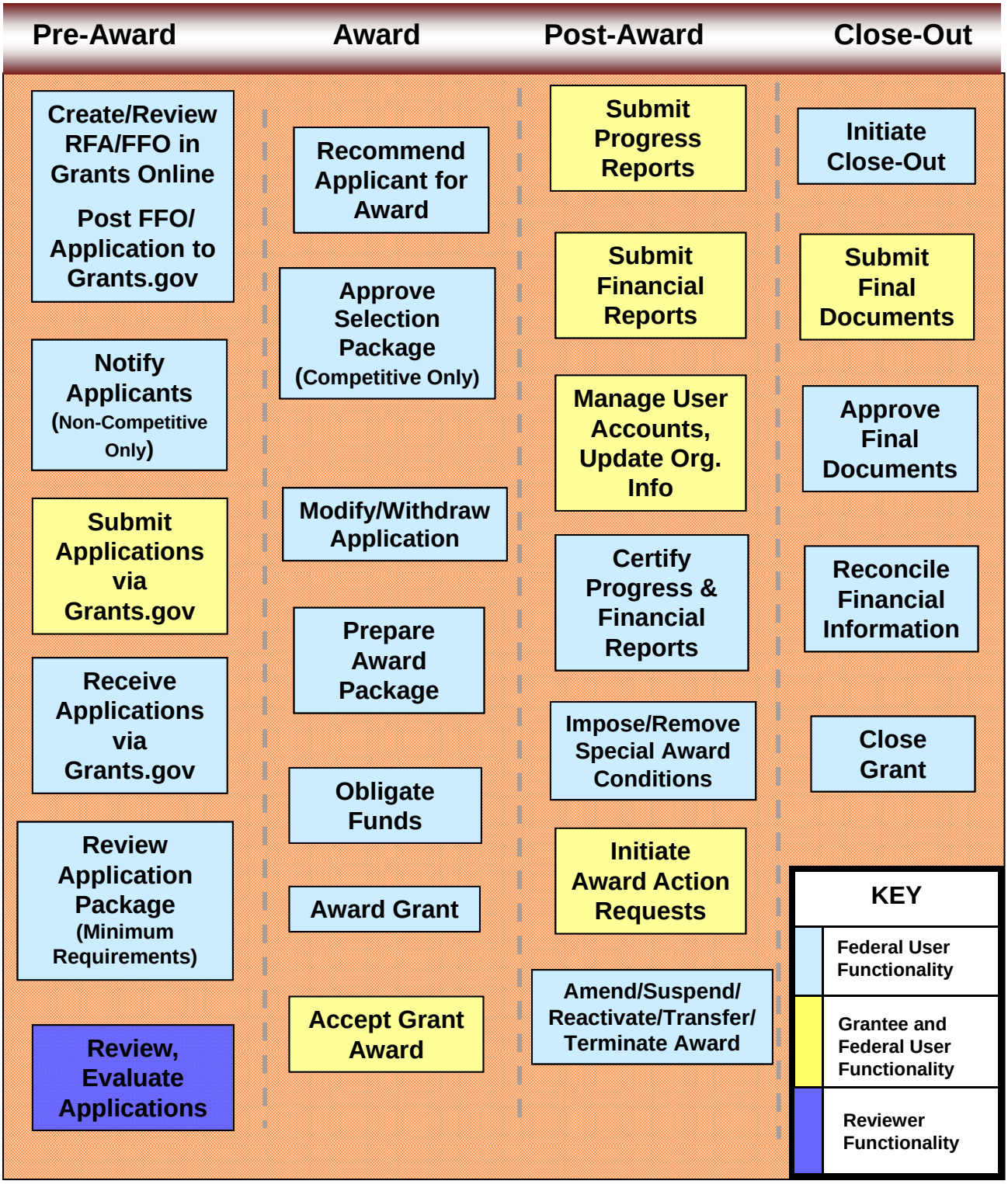
Review Module – October 2011

CBS Interface (NOAA Only) – June 2012

Rollout to EDA – FY 2015

Rollout to Census – FY 2016

Rollout to NIST – FY 2017 (In Planning)


Pre-Award
Award
Post-Award
Close-Out
Create/Review RFA/FFO in Grants Online
Post FFO/ Application to Grants.gov
Notify Applicants (Non-Competitive Only)
Submit Applications via Grants.gov
Receive Applications via Grants.gov
Review Application Package (Minimum Requirements)
Review, Evaluate Applications
Recommend Applicant for Award
Approve Selection Package (Competitive Only)
Modify/Withdraw Application
Prepare Award Package
Obligate Funds
Award Grant
Accept Grant Award
Submit Progress Reports
Submit Financial Reports
Manage User Accounts, Update Org. Info
Certify Progress & Financial Reports
Impose/Remove Special Award Conditions
Initiate Award Action Requests
Amend/Suspend/ Reactivate/Transfer/ Terminate Award
Initiate Close-Out
Submit Final Documents
Approve Final Documents
Reconcile Financial Information
Close Grant
KEY
Federal User Functionality
Grantee and Federal User Functionality
Reviewer Functionality

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

Applicants

GRANTS.GOV℠

FIND. APPLY. SUCCEED.℠

General Public

Hosted by HHS

Recipients

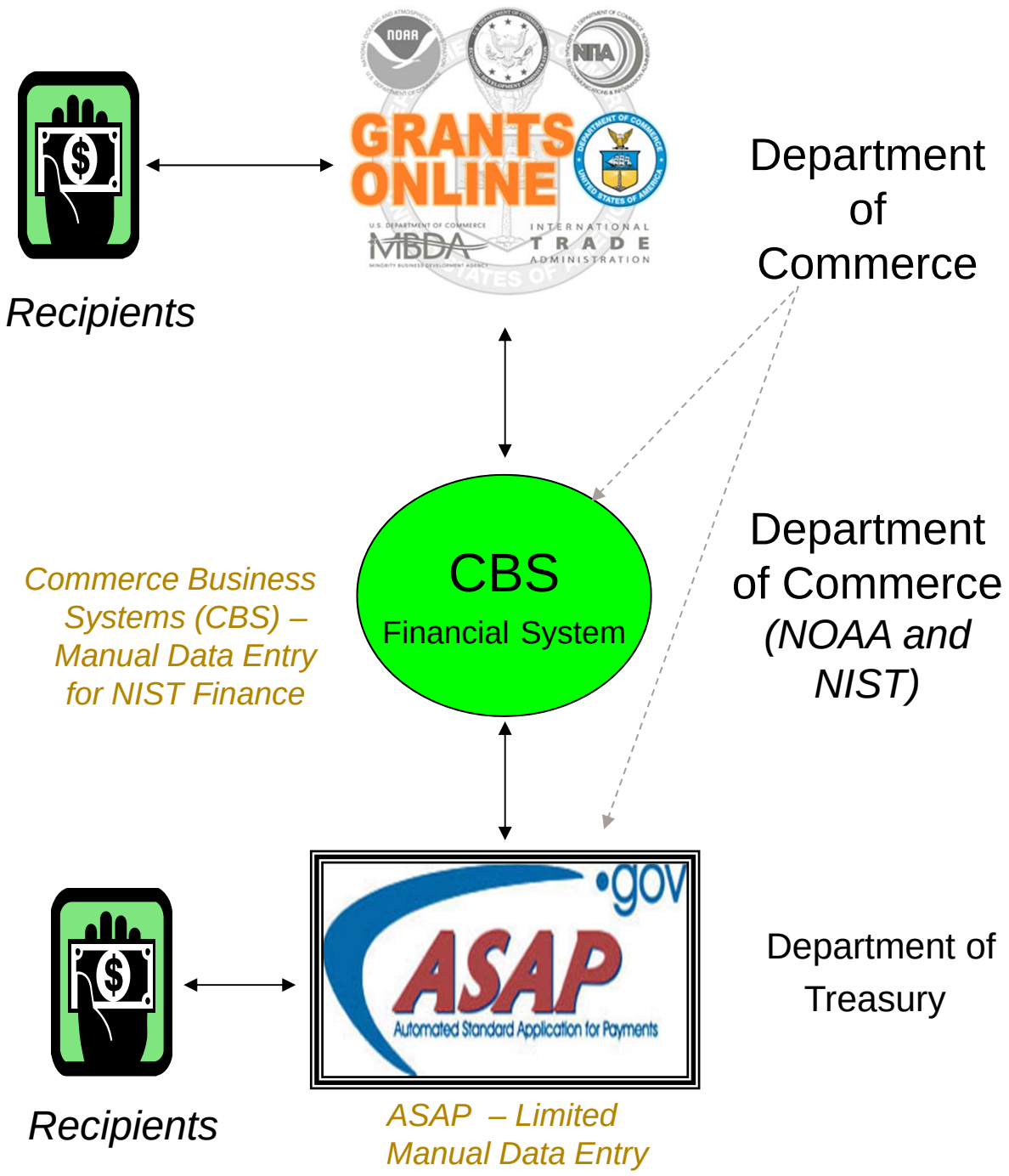
GRANTS ONLINE

U.S. DEPARTMENT OF COMMERCE MBDA MINORITY BUSINESS DEVELOPMENT AGENCY

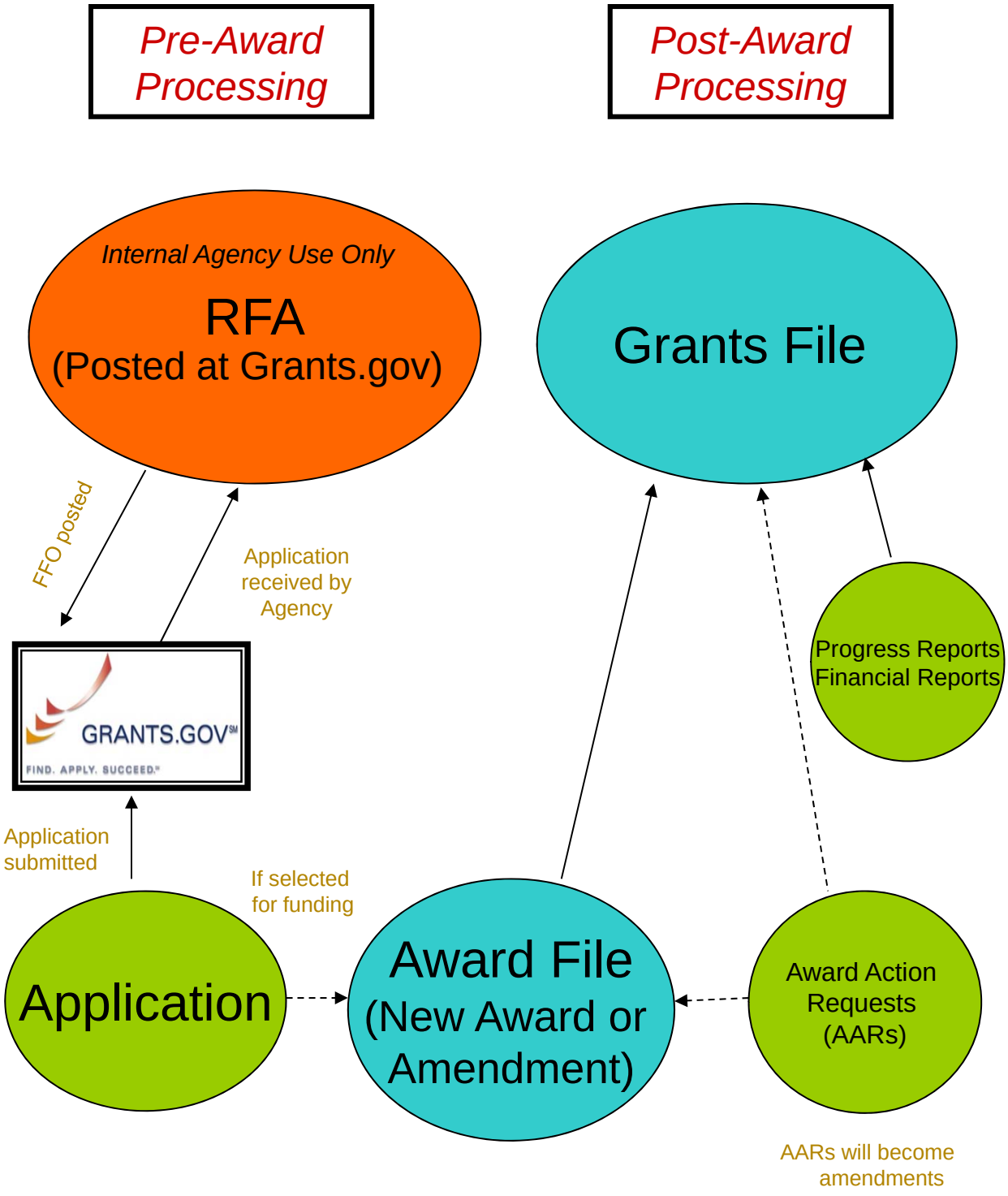
INTERNATIONAL TRADE ADMINISTRATION

Department Of Commerce

Grants Online and ASAP

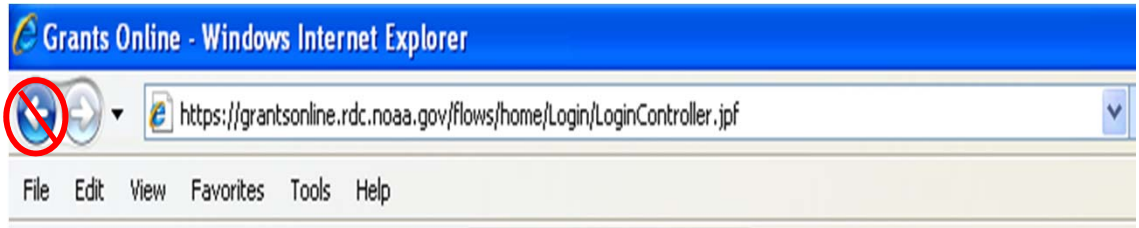


Grants Online Document Relationships



Grants Online Helpful Hints

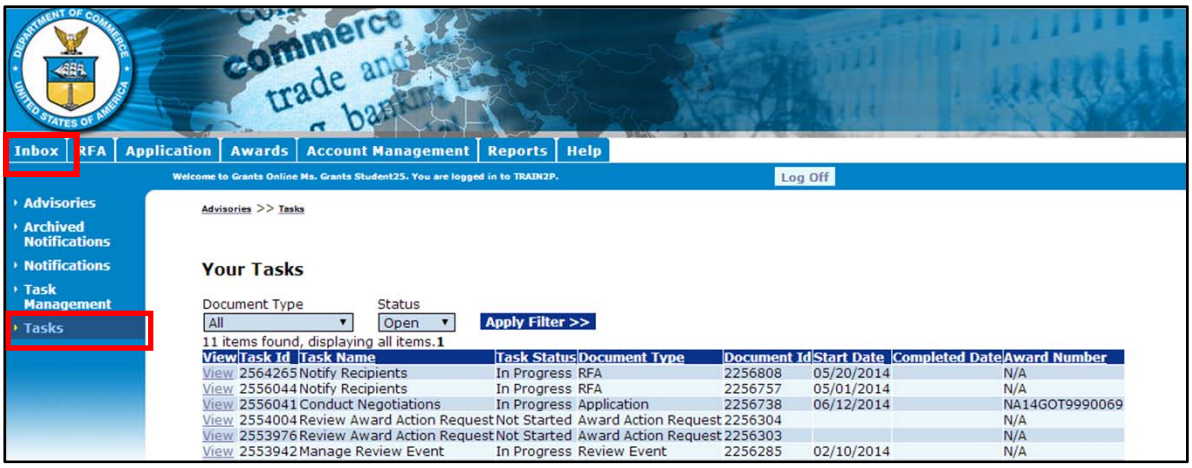
- **DO NOT use the browser's "Back" button.**



- **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.***



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 >>

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

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

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** **301-427-8736**
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**	**404-730-3300** **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** **Kerstin Millius**	**202-400-0662** **202-482-3280**
Census	**Towana Nix** **Terri Taylor**	**301-763-9399** **301-763-2958**

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**

DOC Grants and Grants Online Acronyms

AAR	Award Action Request
ACCS	Accounting Classification Code Structure
ADR	Associate Director for Research and Methodology, Census
ADRM	Assistant Director for Research and Methodology, Census
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)
CARRA	Center for Administrative Records Research and Applications (Census Program Office)
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)
CFDA	Catalog of Federal Domestic Assistance
CFR	Code of Federal Regulations
CM	Competition Manager
Co-PI	(Recipient) Principal Investigator - Secondary
DOC	Department of Commerce
DOC-OS	Office of the Secretary, DOC
DUNS	Dun & Bradstreet Number
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)

DOC Grants and Grants Online Acronyms

NOAA	National Oceanic and Atmospheric Administration
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)

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
View Awards	X	X	X	X	X	X	X	X	X	X	X
Create RFA (Including FFO and Synopsis)	X	X	X								
Review FFO and Synopsis	X	X	X	X	X	X	X	X	X	X	X
Review Reviewer Instructions	X	X	X								
Manage Competition	X	X	X								
Be Assigned Program Officer on RFA	X	X	X								
Be Assigned Program Officer on Application	X	X	X								
Notify Recipients for Non Competitive Apps	X										
Accept Competitive Applications								X			
Approve Selection Package								X			
Forward Documents to FALD	X							X			
Complete Negotiations	X	X	X								
Accept Minimum Requirements Checklist	X	X	X								
Reject Minimum Requirements Checklist	X										
Complete PO Checklist	X	X	X								
Certify and Forward PO Checklist	X										
Complete and Forward NEPA Document	X	X	X								
Approve NEPA Document							X				
Complete and Forward Procurement Request	X	X	X								
Be Requester on Procurement Request	X	X	X	X	X	X	X	X	X	X	
Review Procurement Request	X	X	X	X	X	X	X	X	X	X	
Authorize Funds on Procurement Request				X							
Initiate Partial Funding	X	X	X								
Initiate Award Action Request	X									X	
Initiate Amendment										X	
Complete Administrative Review of Award File										X	
Approve Award											X
Accept Progress Report	X										
Accept Financial Report											X
Authorize Bureau User Access to Grants Online									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 Person
View Awards	X	X	X	X	X	X	X
Initiate Award Action Request	X	X	X	X			X
Submit Award Action Request	X						
Accept or Reject Award	X						
Manage Recipient Users		X					
Complete Progress Report	X		X	X			
Submit Progress Report	X			X			
Complete Financial Report	X	X			X	X	
Submit Financial Report	X					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 oversignt 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.

Grants Online User Role Definitions

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.
GMAC (Grants Management Advisory Committee)	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.

Grants Online User Role Definitions

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 by done be users with other Program Office roles such as Federal Program Officer (Certified or Uncertified), Program Office Staff, and Program Office Reviewer.
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 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 Progam Management Office who perform data quality assurance tasks on Grants Online organizaton records before they are passed to the Vendor Control users in the Finance Office.
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 for US Census Bureau

Universal RFA Creation & Application Processing

June 2016

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

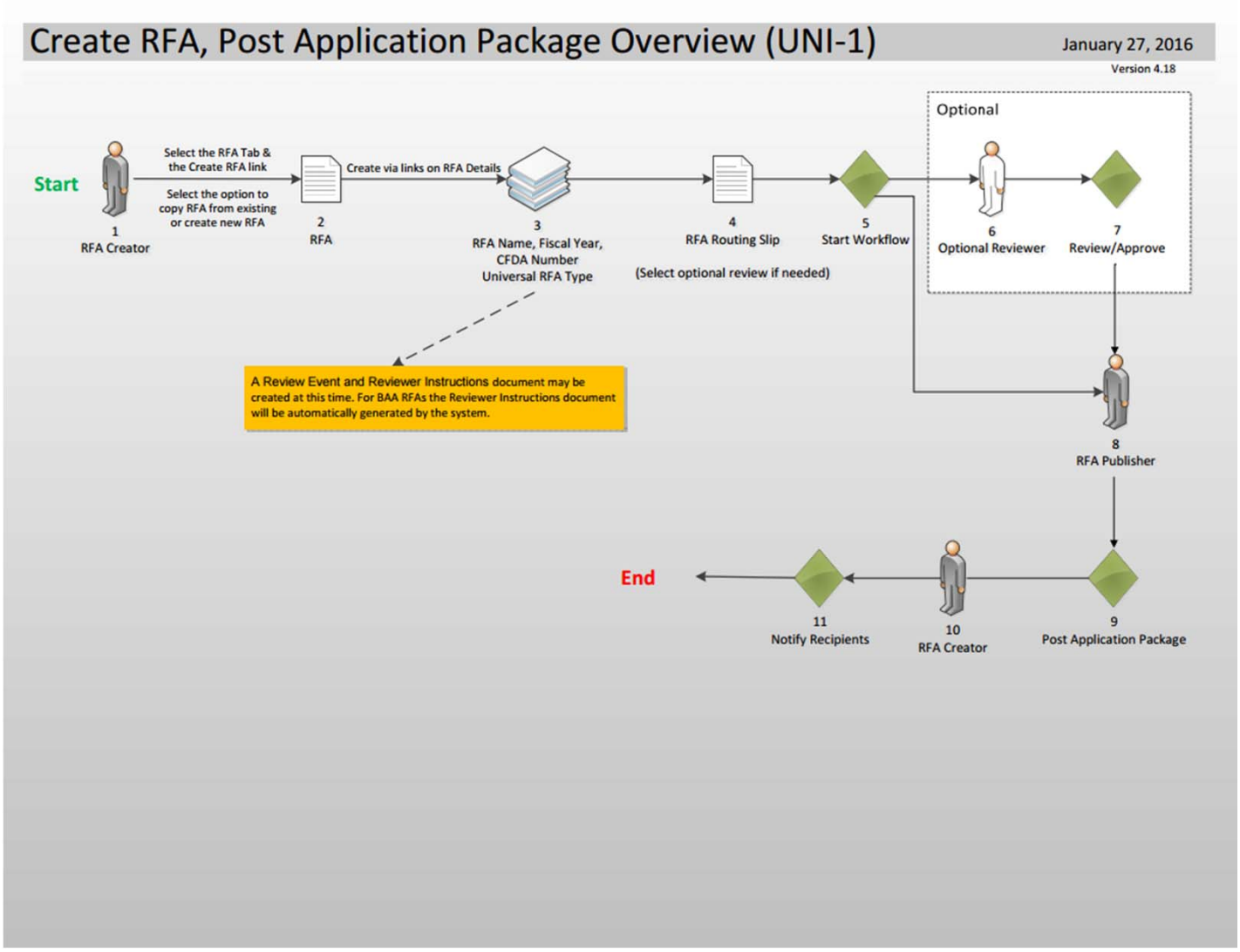
- **Opportunity Number –** ***Federal Opportunity Number***
- **Opportunity Title –** ***RFA Name***
- **Opportunity Category – (Competitive RFA ➔*****"Discretionary"; Universal RFA ➔ "Other")***
- **Category Explanation (If Opportunity Category is other):** ***RFA Type***
- ***CFDA Number***
- **Posting 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***

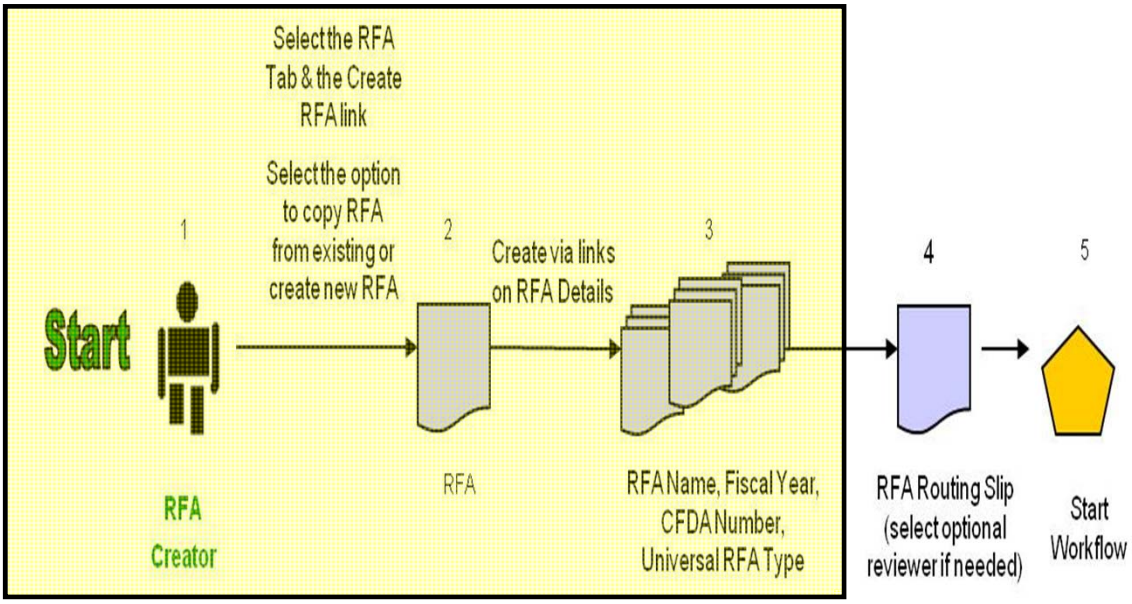
NOTES:

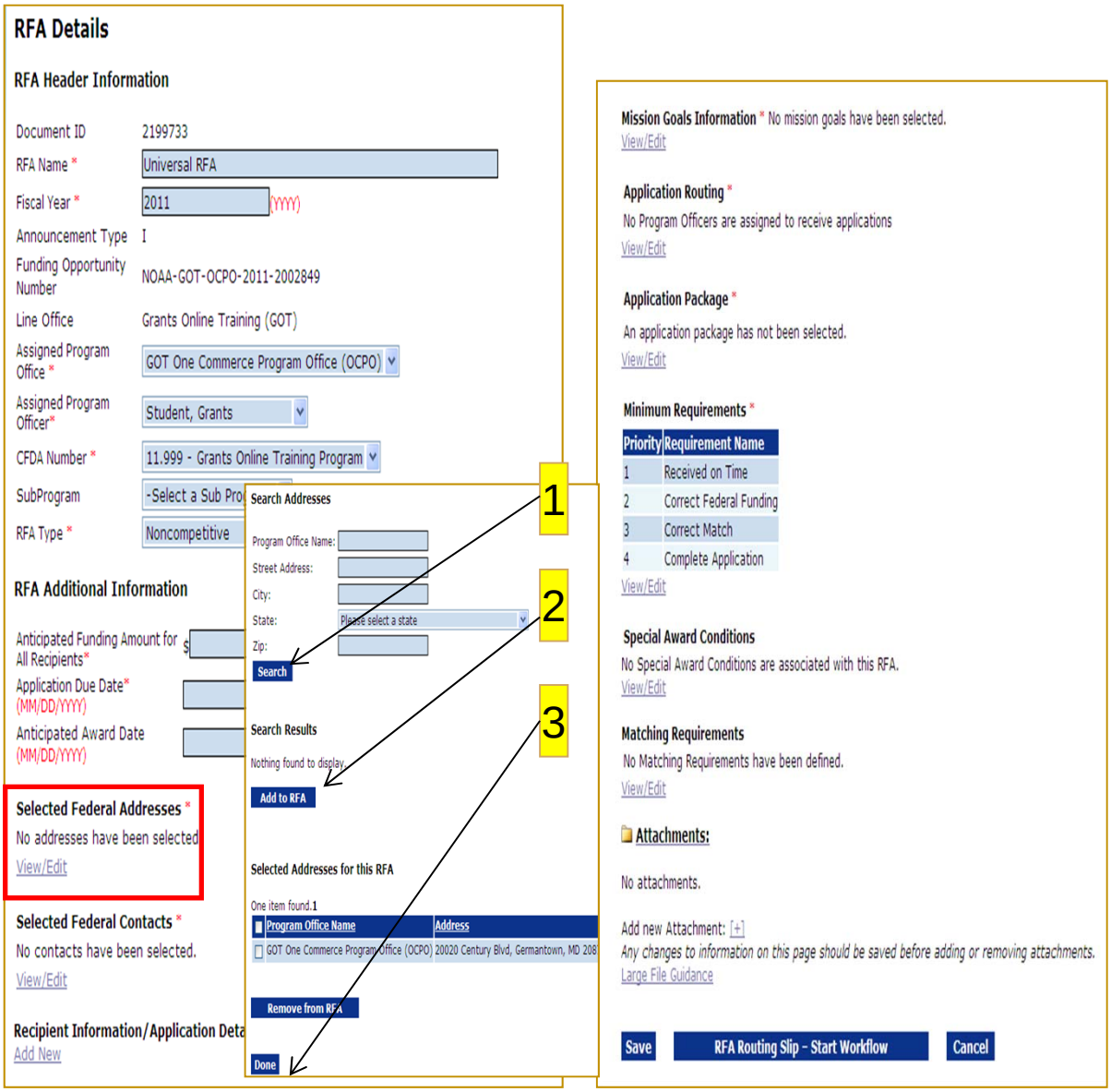
1. The Assigned Program Officer for the RFA must be a "Certified FPO" to advance documents to the next step in the workflow process.

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.

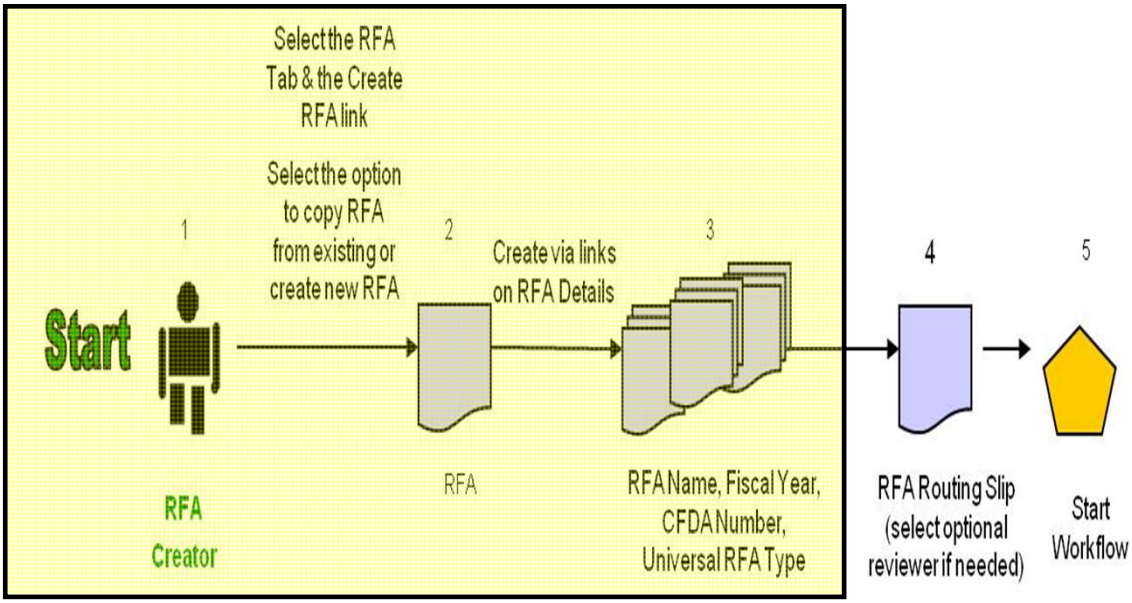
Universal Process – RFA Creation

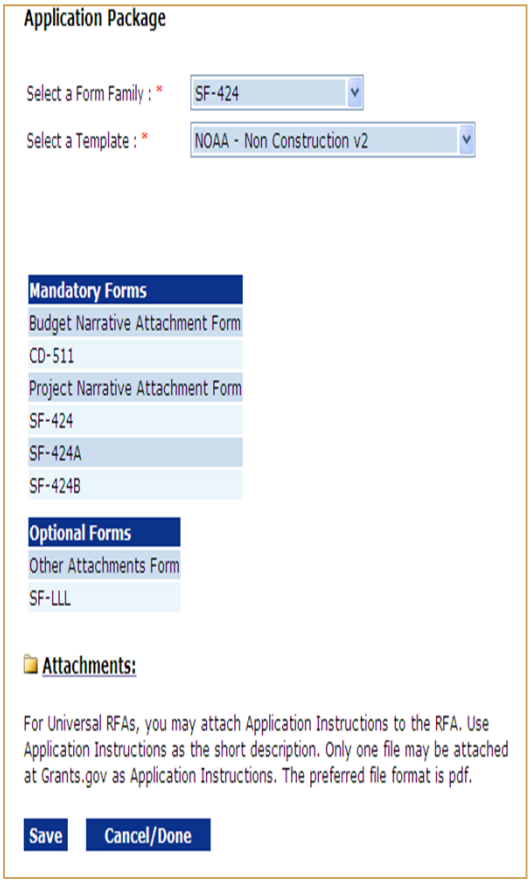


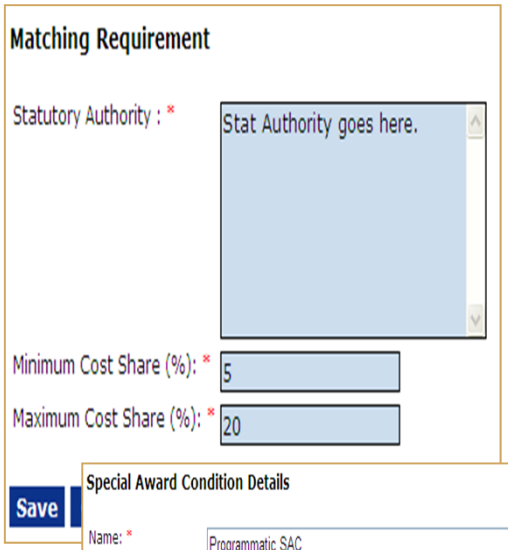




When adding a recipient to the RFA use the DUNS number to perform the lookup.

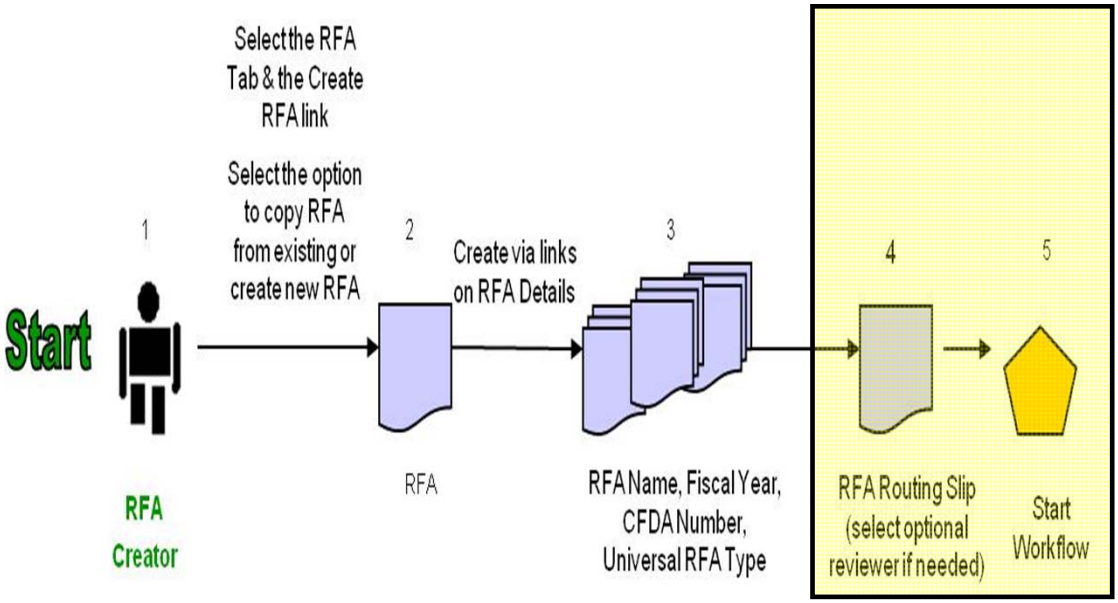






If the Program Office has specific instructions for the recipient they may be attached to the Application Package screen. Otherwise, the RFA Publisher will upload a generic document.

NOTE: *To create the Review Event see: http://www.corporateservices.noaa.gov/grantsonline/Documents/Quick%20Reference%20Guides/ReviewEvent_Creation.pdf*



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.

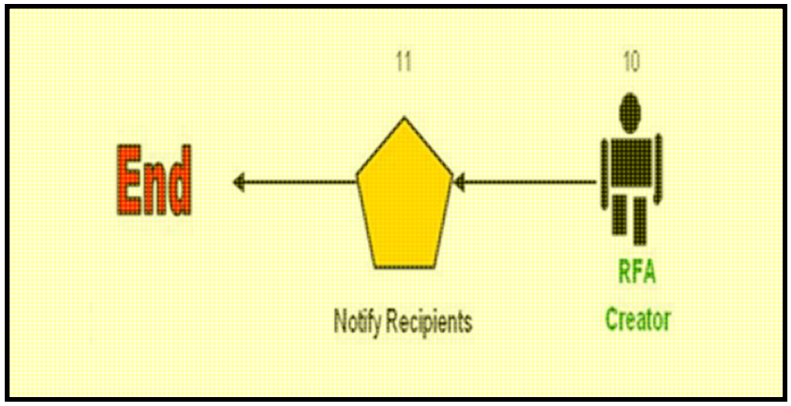
Add Optional Reviewer

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
- Notify
- View RFA Details

Your Comments:

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):

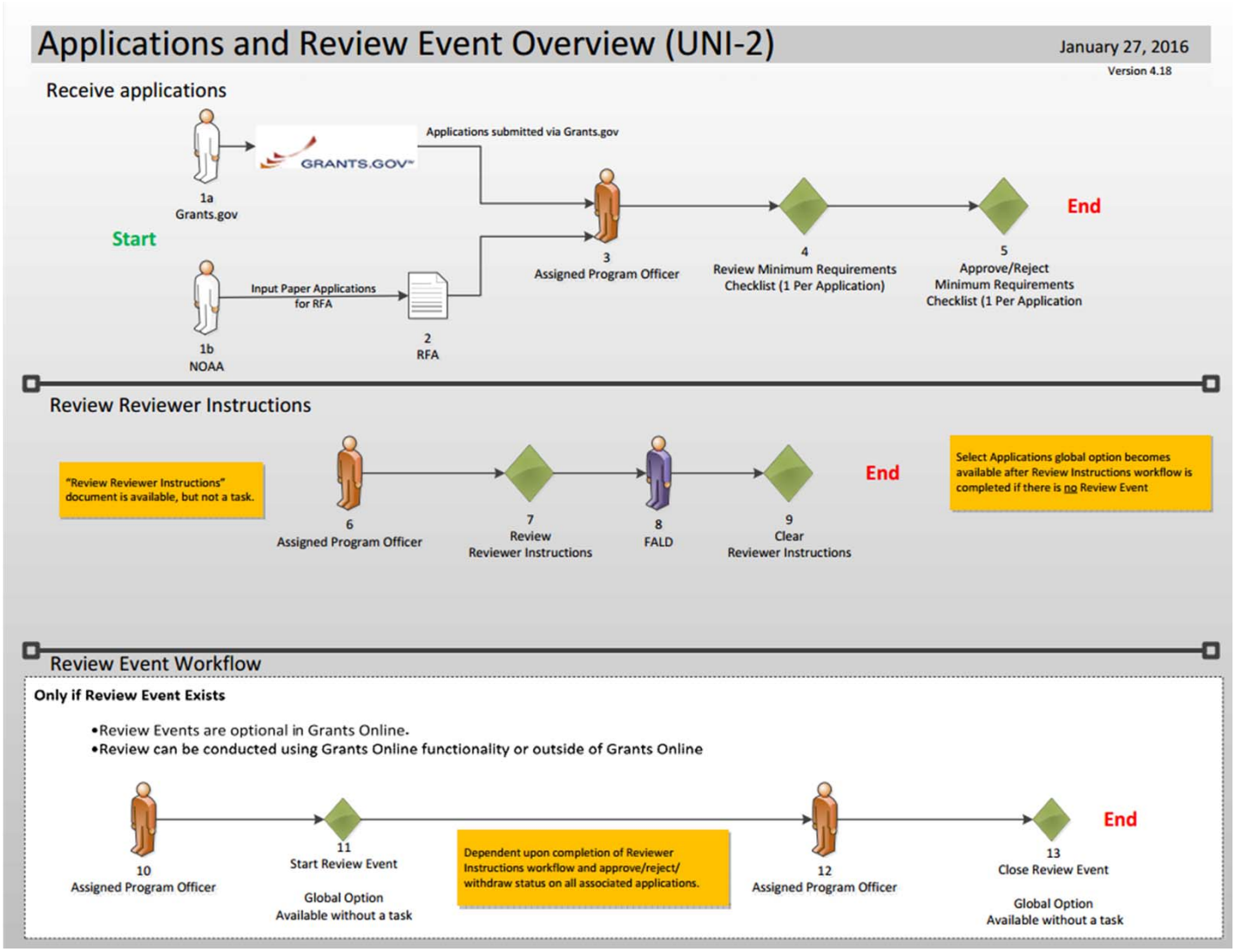
RFA Name: Generating Sample Notifications
Fiscal Year: 2015
CFDA Number: 11.999
Opportunity Number: NOAA-ONPO-2015-2001279
Agency: National Oceanic and Atmospheric Administration
Opening Date: 2014-12-10 10:54:01.0
Pgm Office: One NOAA Program Office (ONPO)
Pgm Officer: Program Officer
Closing Date: 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.

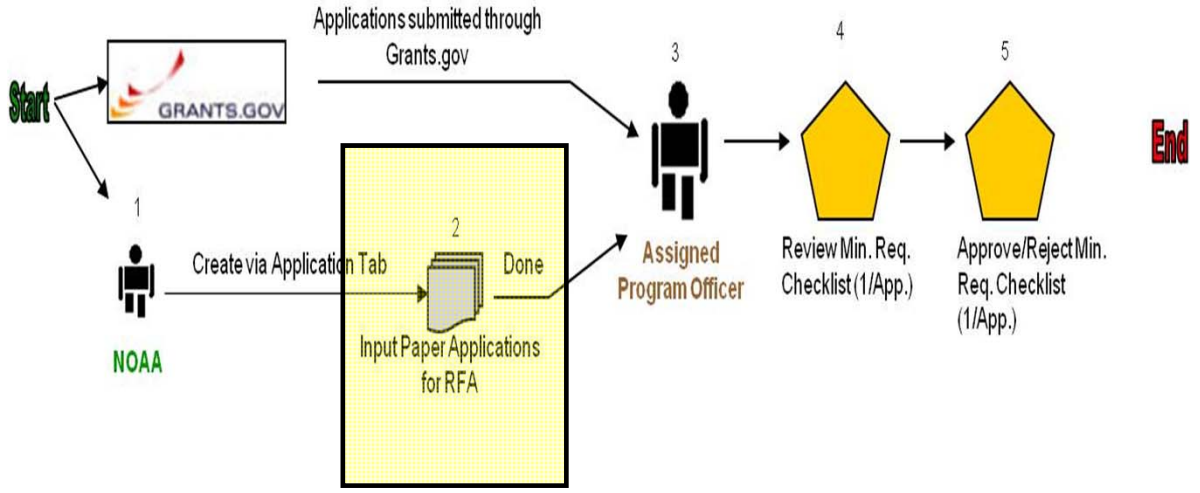
For further information contact:

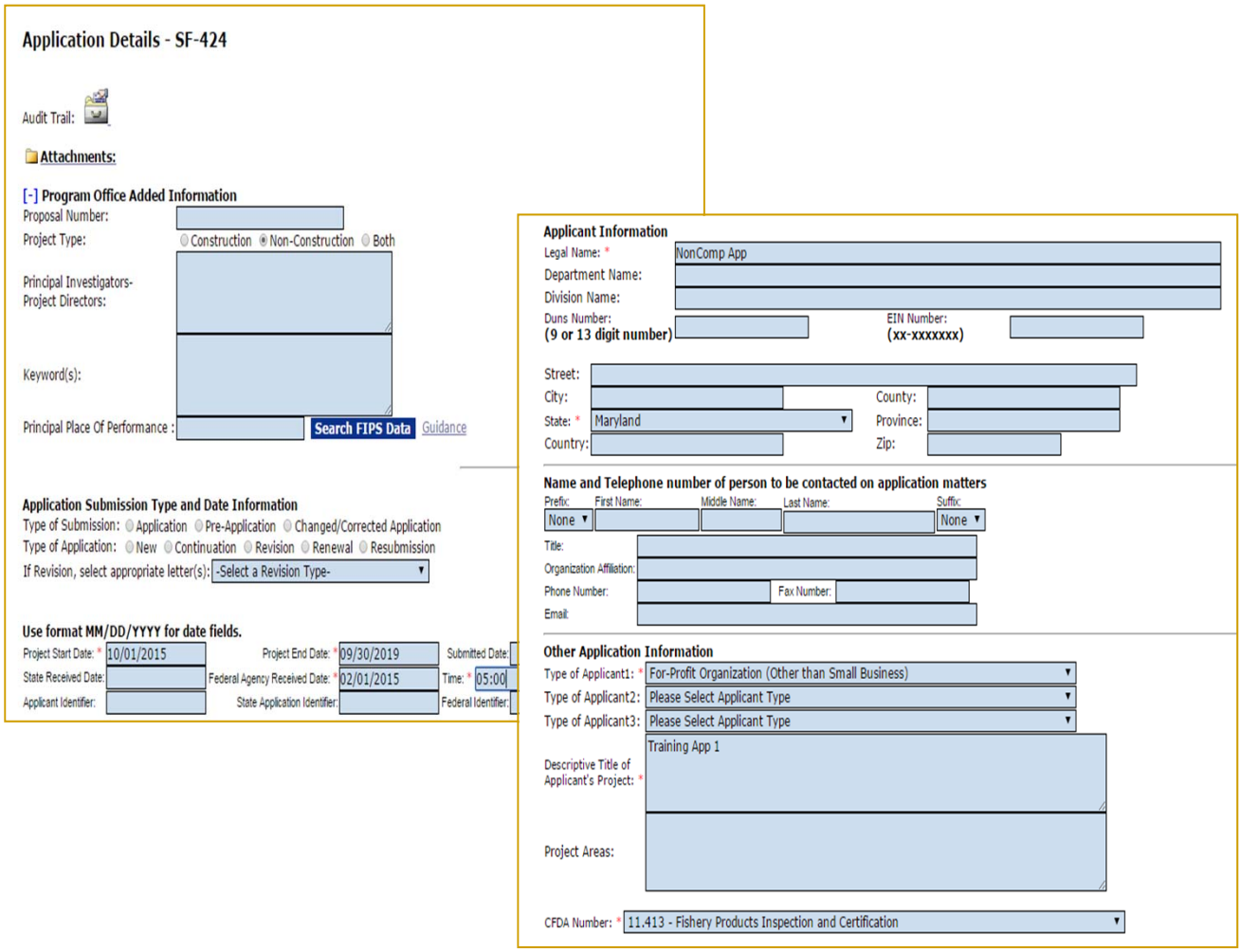
Name: Program Officer
Phone: 301-555-1212
Address: 14th Street & Constitution Avenue, NW
Washington, DC 20230
Email: federal.program.officer@noaa.gov

Universal Process – Applications and Review Event



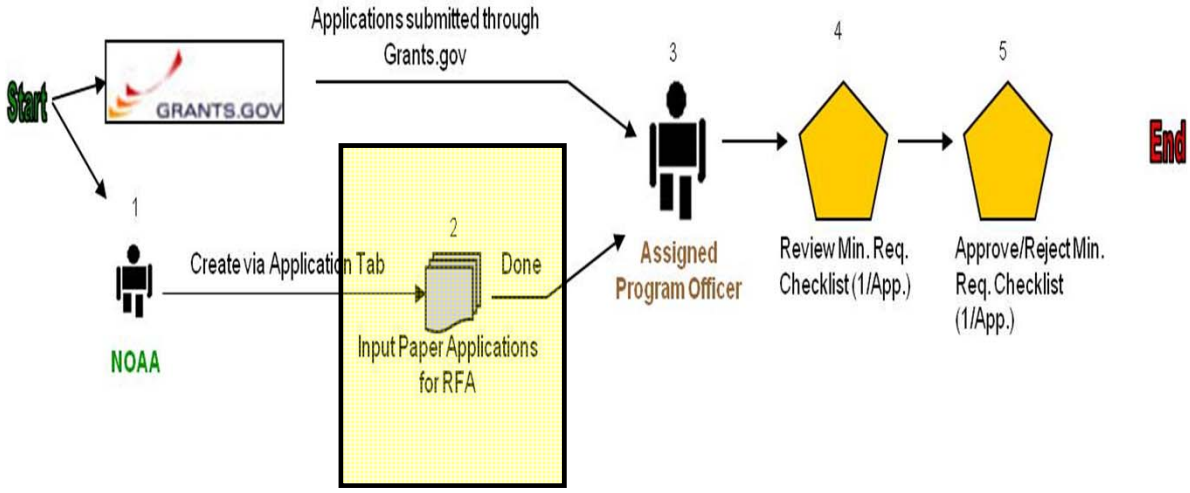
A Review Event is optional for the Universal process.

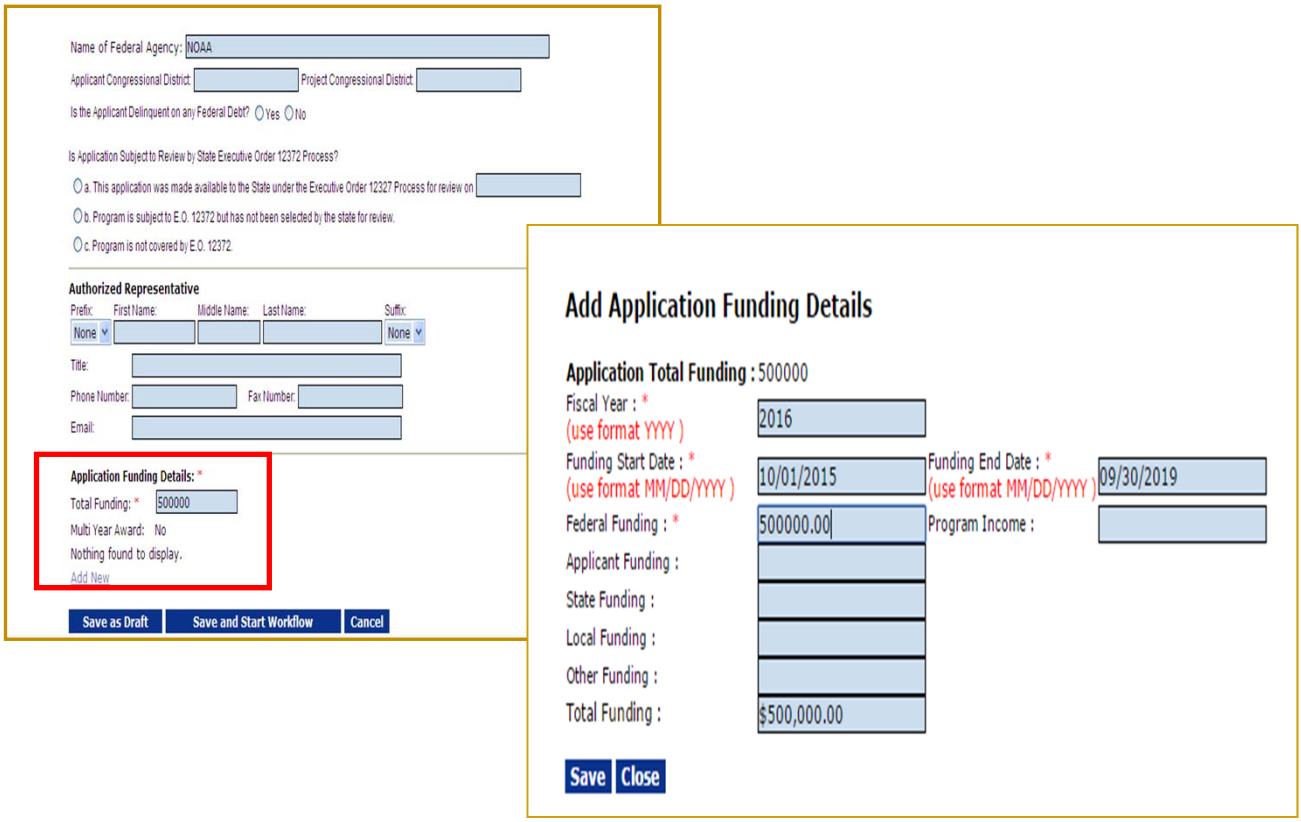


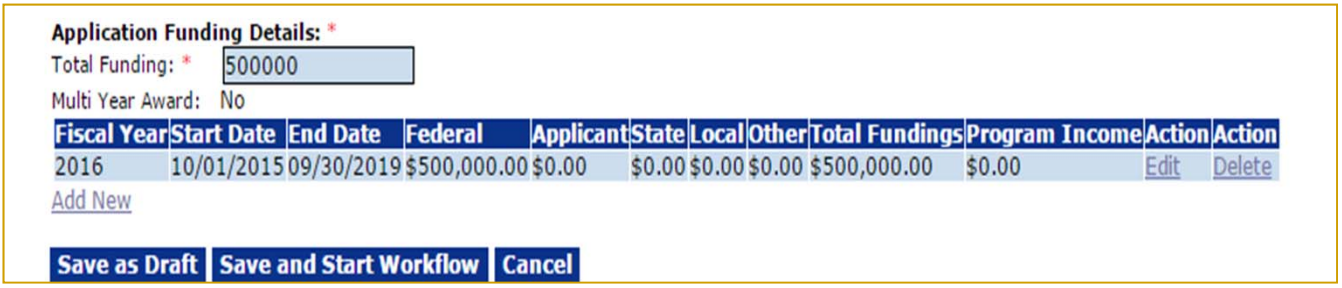


To start, select the **Input Paper Applications** menu item from the Application tab. The data on the Application Details screen will already be filled in if the application was exported from Grants.gov. However, if a paper application is received by the Program Office the data must be entered on this 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.

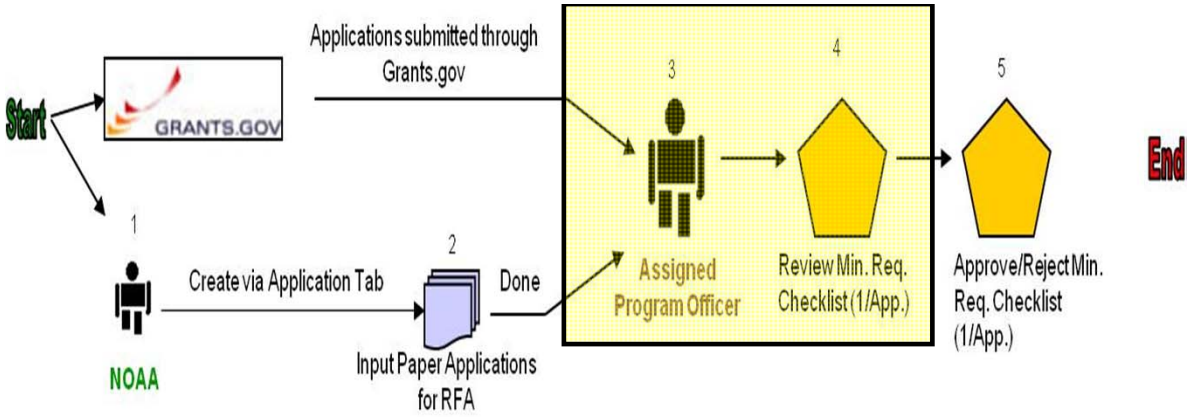
The Application Details screen contains most of the fields found on an SF-424. After entering all required fields, click **Save as Draft**. If you have missed any required fields you will see an error message with guidance regarding the missing fields.







The Total Funding amount includes both Federal and matching funds.



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	○ Yes ○ No ○ Not Applicable	Spell Check
Correct Federal Funding	○ Yes ○ No ○ Not Applicable	Spell Check
Correct Match	○ Yes ○ No ○ Not Applicable	Spell Check
Complete Application	○ Yes ○ No ○ Not Applicable	Spell Check

Overall Comments:

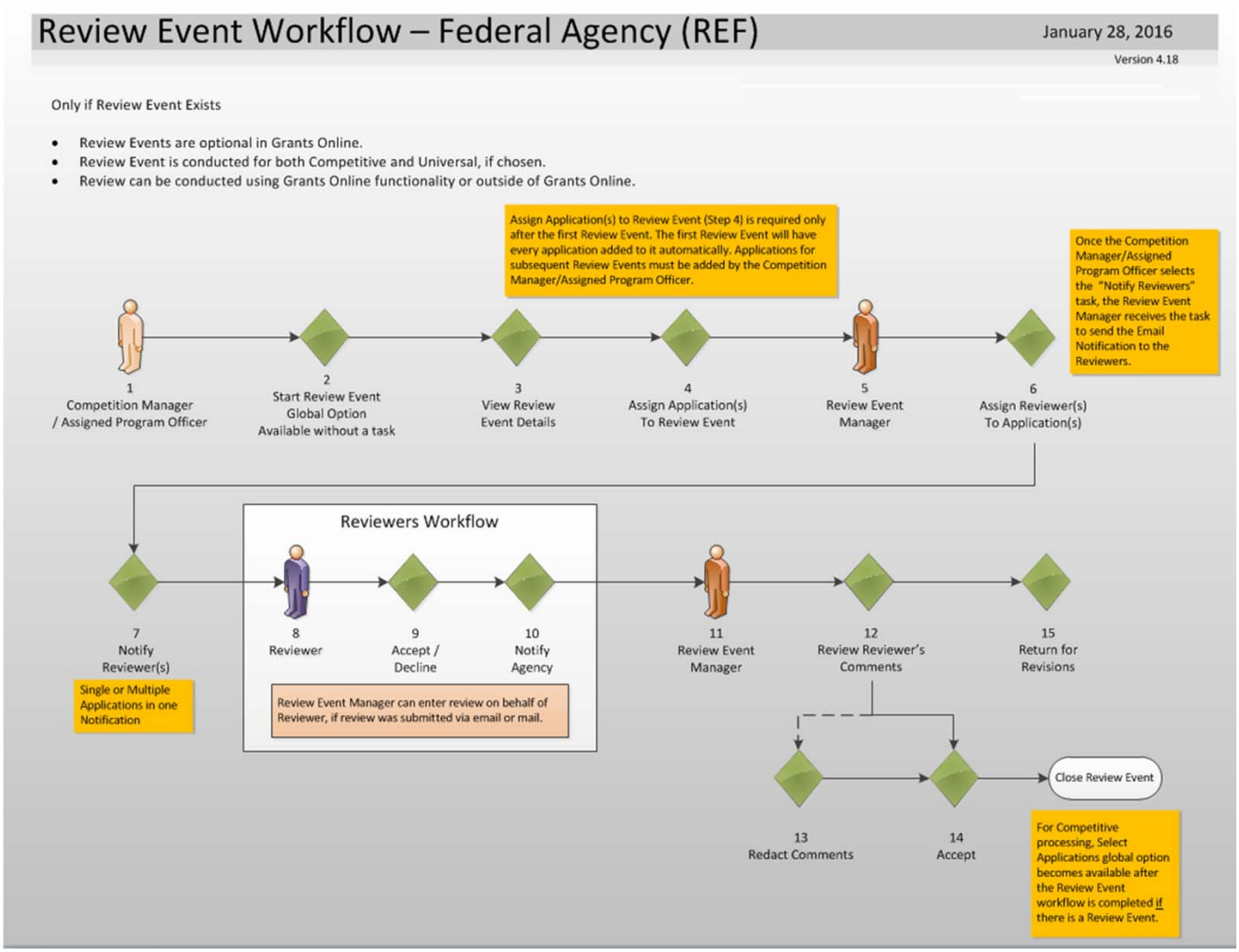
Spell Check

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.

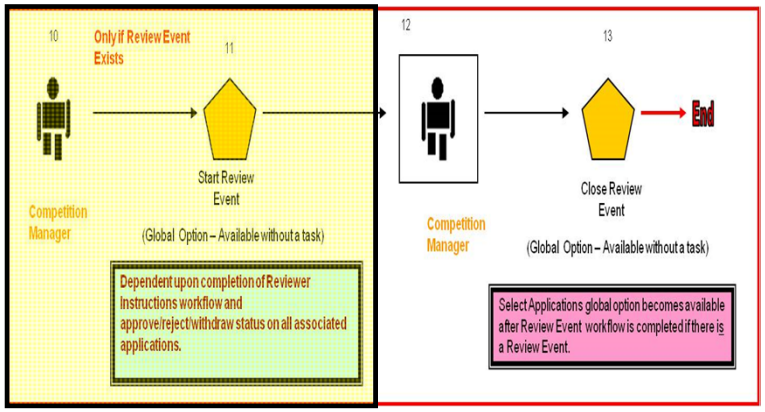
Conducting a Review Event

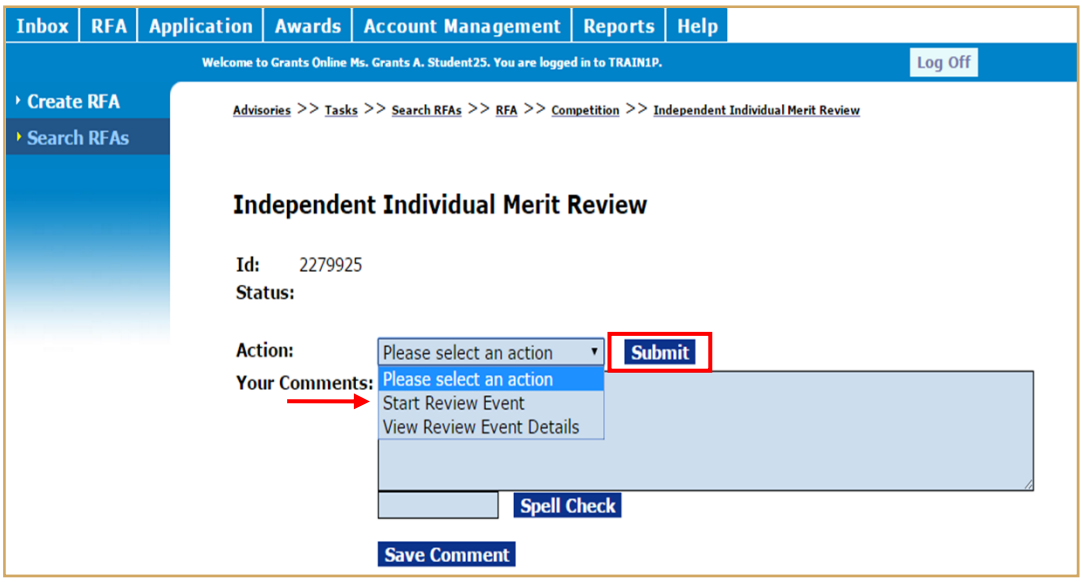


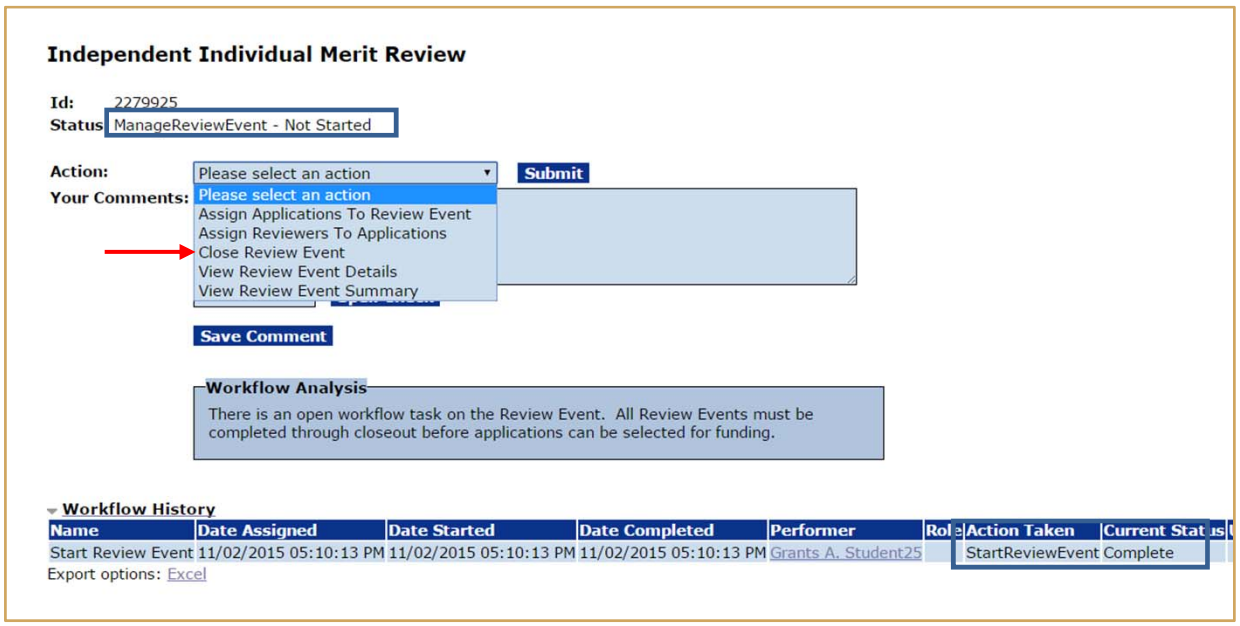
For further training material, please refer to item #15 on the PMO website:

Review Event Quick Reference Guides

- 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


10
Only if Review Event Exists
11
Start Review Event
Competition Manager
(Global Option – Available without a task)
Dependent upon completion of Reviewer Instructions workflow and approve/reject/withdraw status on all associated applications.
12
13
End
Close Review Event
Competition Manager
(Global Option – Available without a task)
Select Applications global option becomes available after Review Event workflow is completed if there is a Review Event.


Inbox
RFA
Application
Awards
Account Management
Reports
Help
Welcome to Grants Online Ms. Grants A. Student25. You are logged in to TRAIN1P.
Log Off
Create RFA
Search RFAs
Advisories >> Tasks >> Search RFAs >> RFA >> Competition >> Independent Individual Merit Review
Independent Individual Merit Review
Id: 2279925
Status:
Action:
Please select an action
Submit
Your Comments:
Please select an action
Start Review Event
View Review Event Details
Spell Check
Save Comment


Independent Individual Merit Review
Id: 2279925
Status ManageReviewEvent - Not Started
Action:
Please select an action
Submit
Your Comments:
Please select an action
Assign Applications To Review Event
Assign Reviewers To Applications
Close Review Event
View Review Event Details
View Review Event Summary
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

- For details on Conducting a Review Event see: *http://www.corporateservices.noaa.gov/grantsonline/Documents/Quick%20Reference%20Guides/ReviewEventManager_UserGuide.pdf*

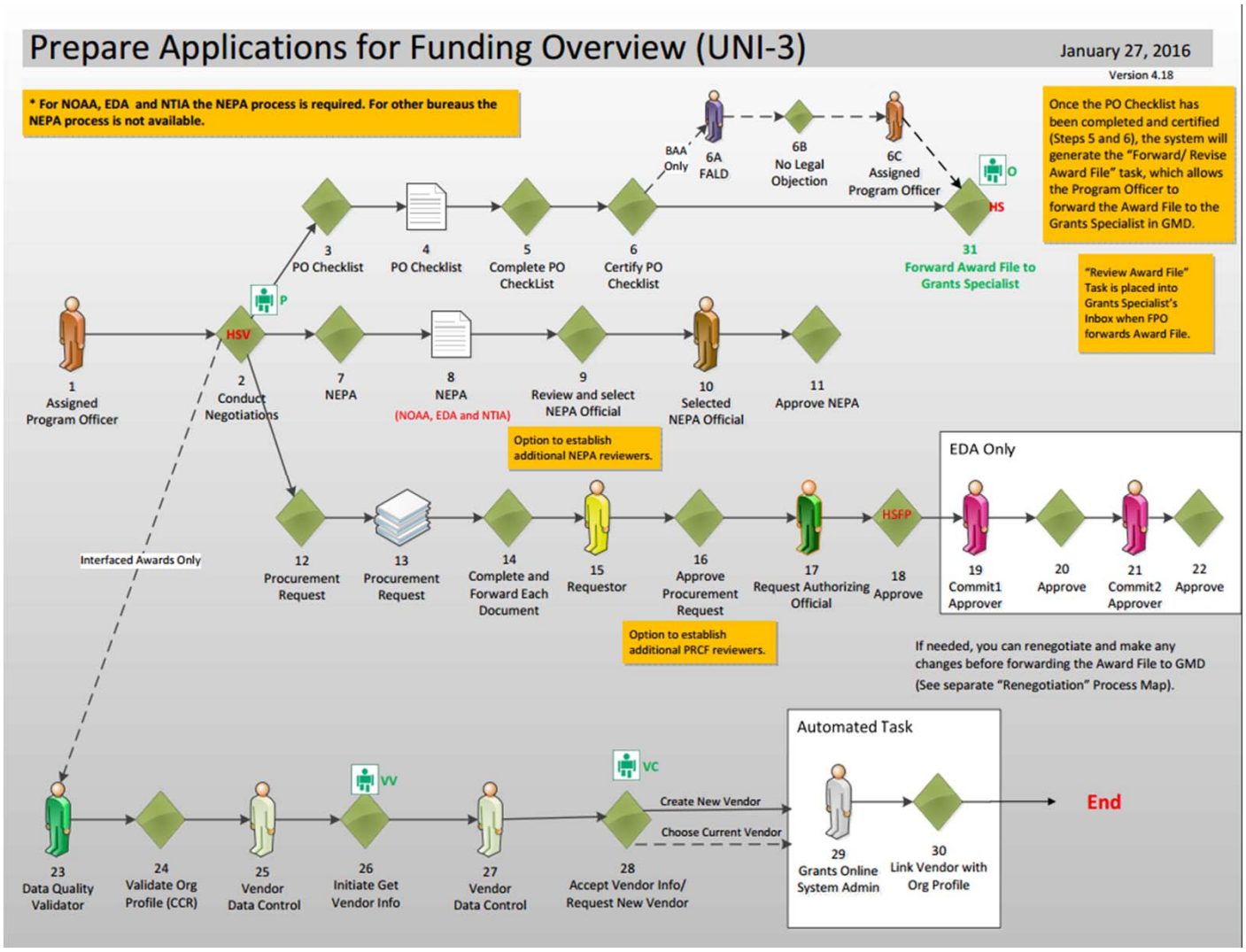
- The Competition Manager should navigate to the Review Event launch page (RFA ➔ Search for the RFA ➔ Competition ➔ select the appropriate Review Event). From the Action dropdown Menu, the Competition Manager should select **Start Review Event** and click the **Submit** button. In this instance, we are 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".

- 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**.

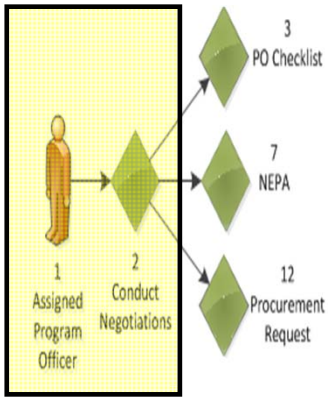
- Once a Review Event has been started, all reviews assignments must be completed or removed in order to close the Review Event.

Universal Process – Prepare Applications for Funding



Federal Grants System DUNS Relationships

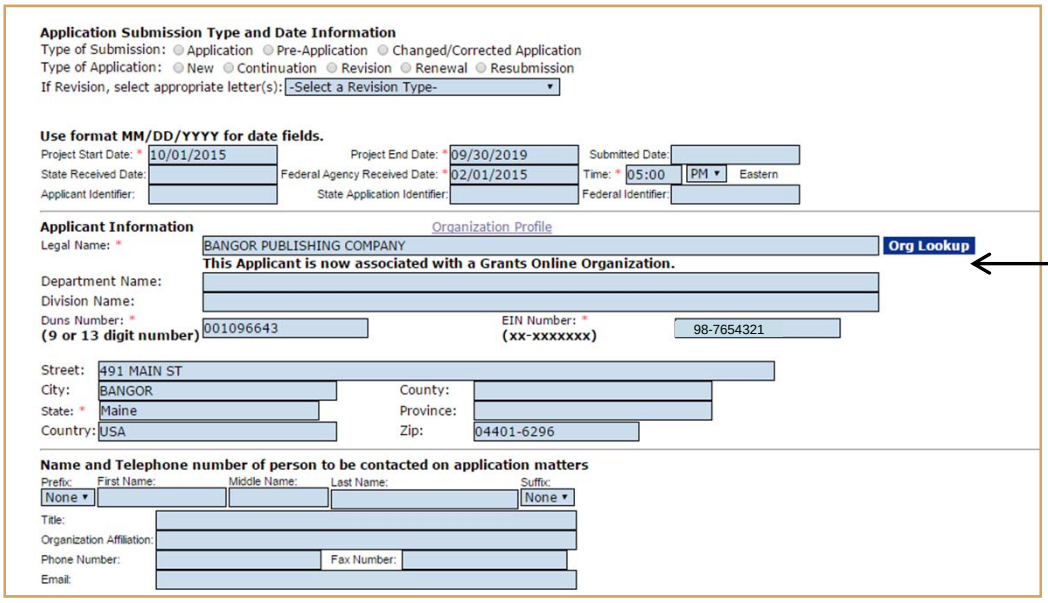
An award must be linked to the SAME DUNS Number in all Federal Systems



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
View	Notify Recipients	N/A	02/05/2011	RFA	N/A	In	2199760	1795525	02/05/2011		N/A	N/A

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): -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 Organization Profile
Legal Name: * BANGOR PUBLISHING COMPANY Org Lookup
This Applicant is now associated with a Grants Online Organization.
Department Name:
Division Name:
Duns Number: * **(9 or 13 digit number)** 001096643 EIN Number: * **(xx-xxxxxxx)** 98-7654321

Street: 491 MAIN ST
City: BANGOR County:
State: * Maine Province:
Country: USA Zip: 04401-6296

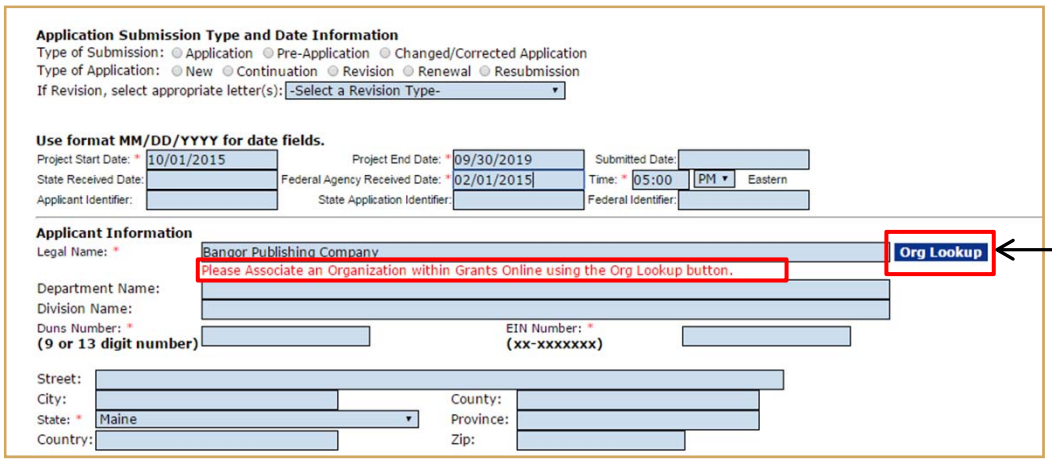
Name and Telephone number of person to be contacted on application matters
Prefix: None First Name: Middle Name: Last Name: Suffix: None
Title:
Organization Affiliation:
Phone Number: Fax Number:
Email:

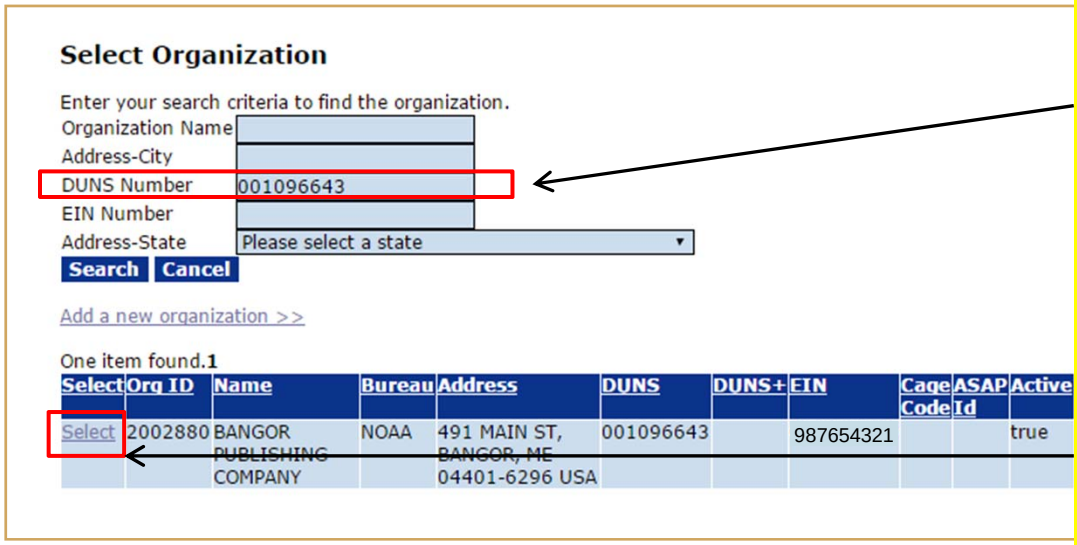
Step 1:

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 is now associated with a Grants Online Organization."

Proceed to Step 2.

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





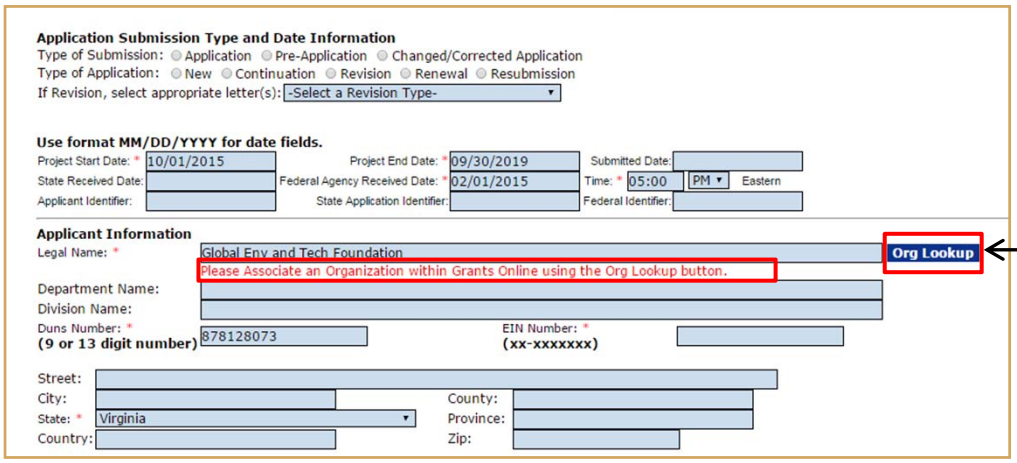
Step 1:

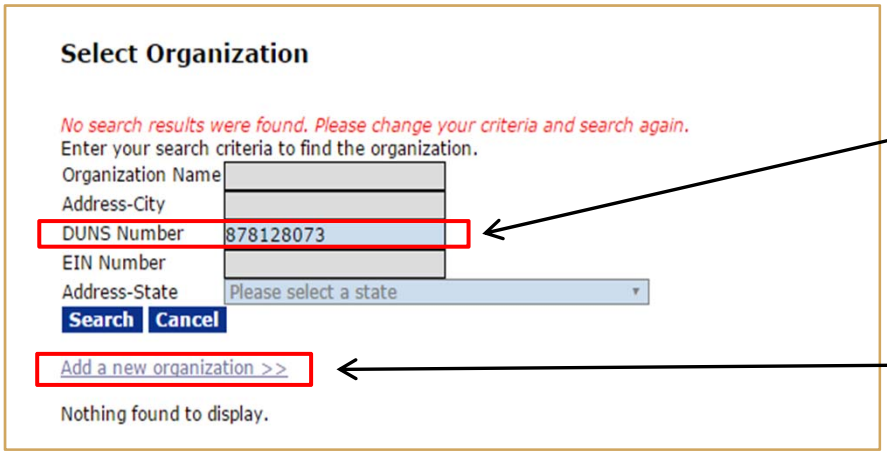
a) *If the DUNS Number was not entered a red message is displayed. Click the* ***Org Lookup*** *button to find the organization's record in the database or add if necessary.*

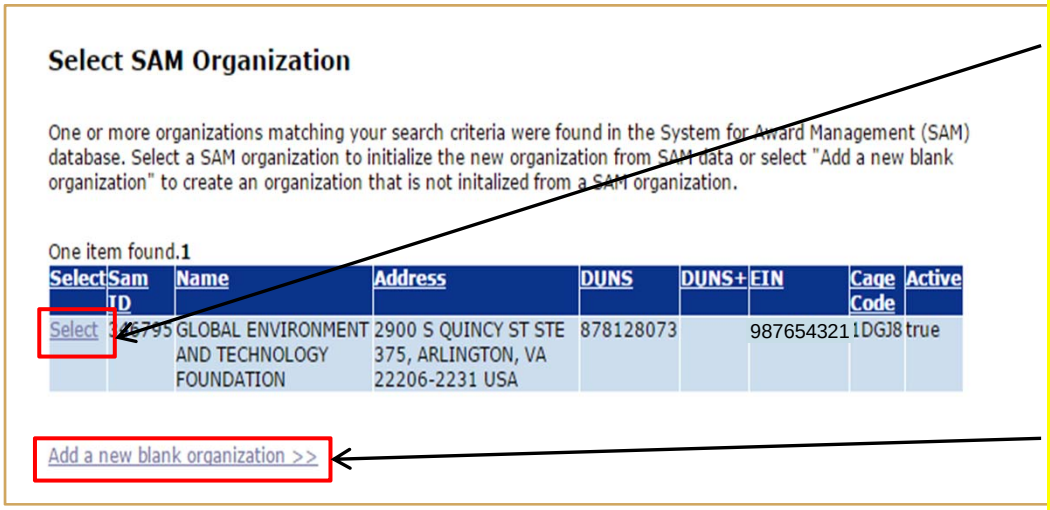
b) *Enter the search criteria (enter DUNS Number if available). Click the* ***Search*** *button.*

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.*

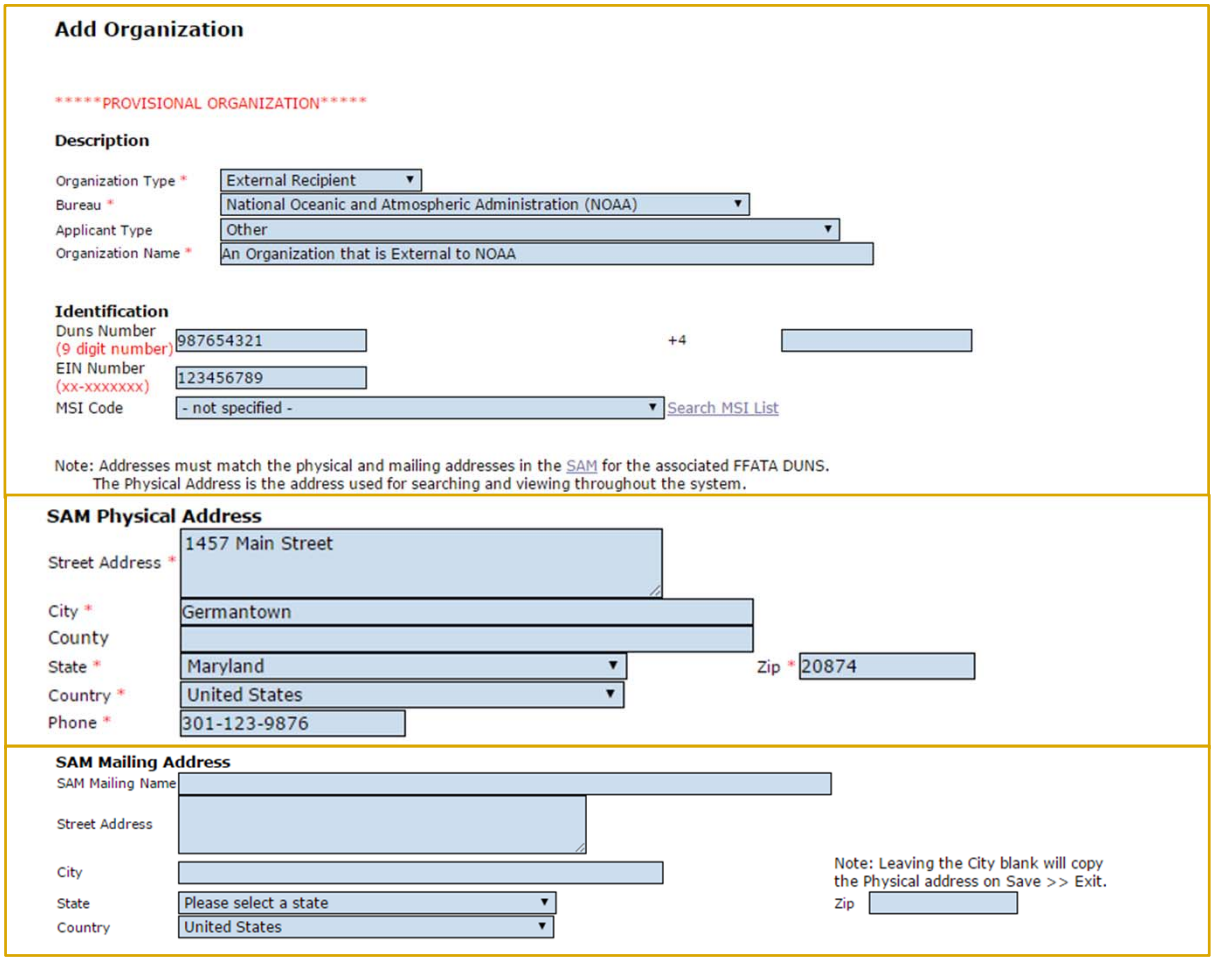
OR

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

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 associated with the user's Bureau 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.

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.

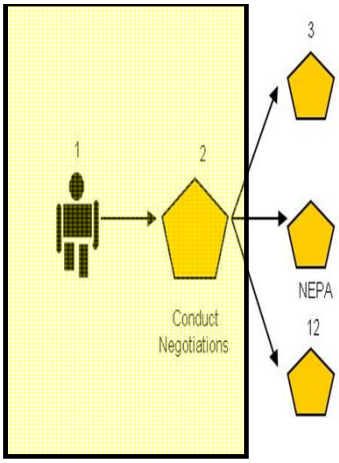
SAM Physical Address
Street Address * 1457 Main Street
City * Germantown
County
State * Maryland Zip * 20874
Country * United States
Phone * 301-123-9876

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

ONLY NEEDED IF RECIPIENT IS NOT REGISTERED IN SAM.gov

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	Notify Recipients	N/A	02/05/2011	RFA	N/A	In	2199760	1795525	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: N/A - Not Selected

Principal Place Of Performance : Search FIPS Data Guidance

Step 2: *Select Construction, Non-Construction or Both*

Authorized Representative

Prefix: None First Name: Middle Name: Last Name: Suffix: None

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:

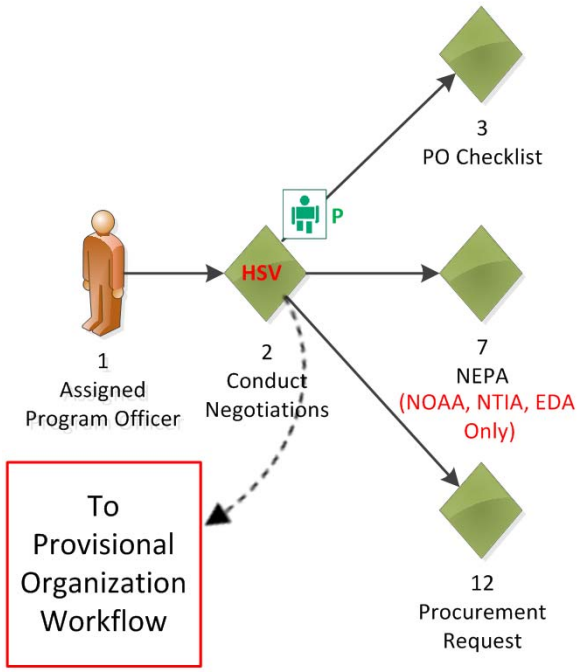
Generate New Award Number

Associate with Existing Award

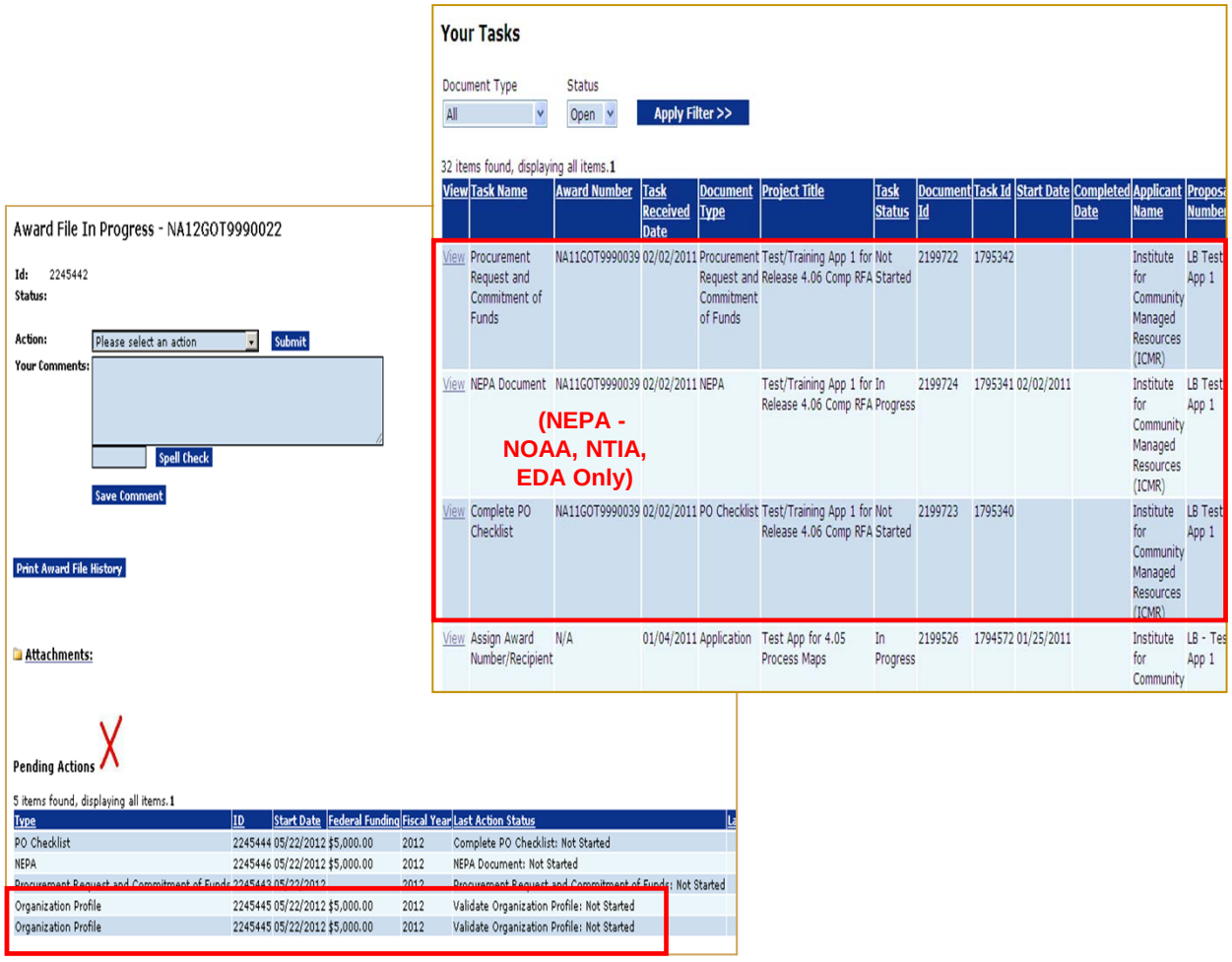
Save Save and Return to Main Cancel

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



Your Tasks

Document Type: All | Status: Open | Apply Filter >>

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	Proposal Number
View	Procurement Request and Commitment of Funds	NA11GOT9990039	02/02/2011	Procurement Request and Commitment of Funds	Test/Training App 1 for Release 4.06 Comp RFA	Not 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 Release 4.06 Comp RFA	In 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 Release 4.06 Comp RFA	Not 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 - Tes App 1

(NEPA - NOAA, NTIA, EDA Only)

Award File In Progress - NA12GOT9990022

Id: 2245442
Status:

Action: Please select an action | Submit
Your Comments:
Spell Check
Save Comment

Print Award File History

Attachments:

Pending Actions

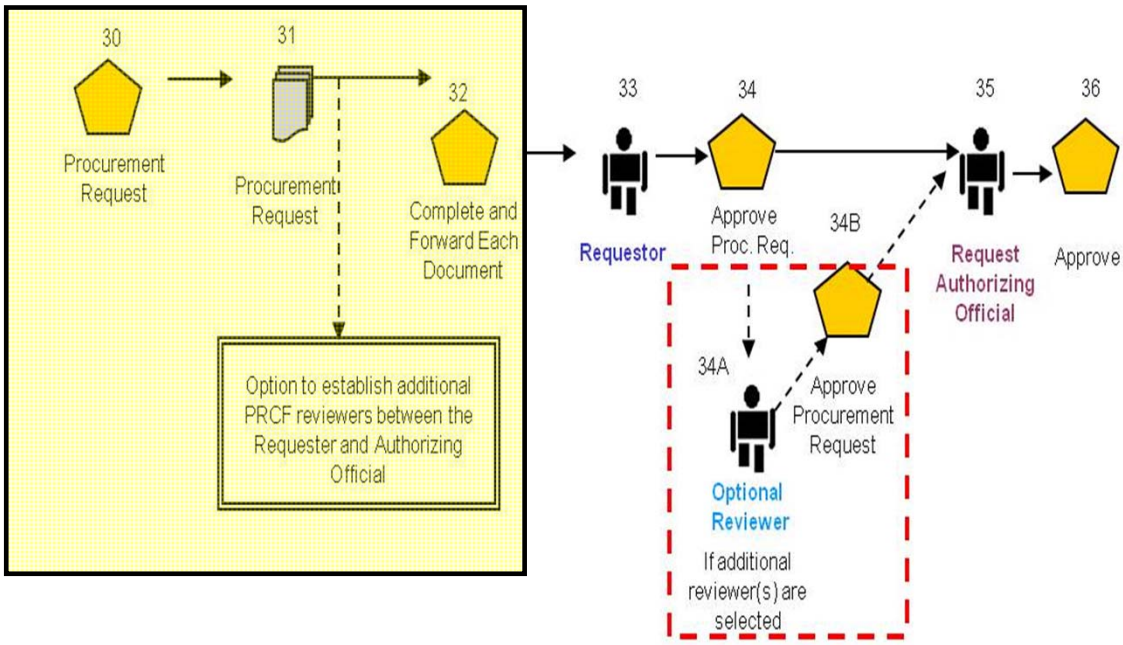
5 items found, displaying all items.1

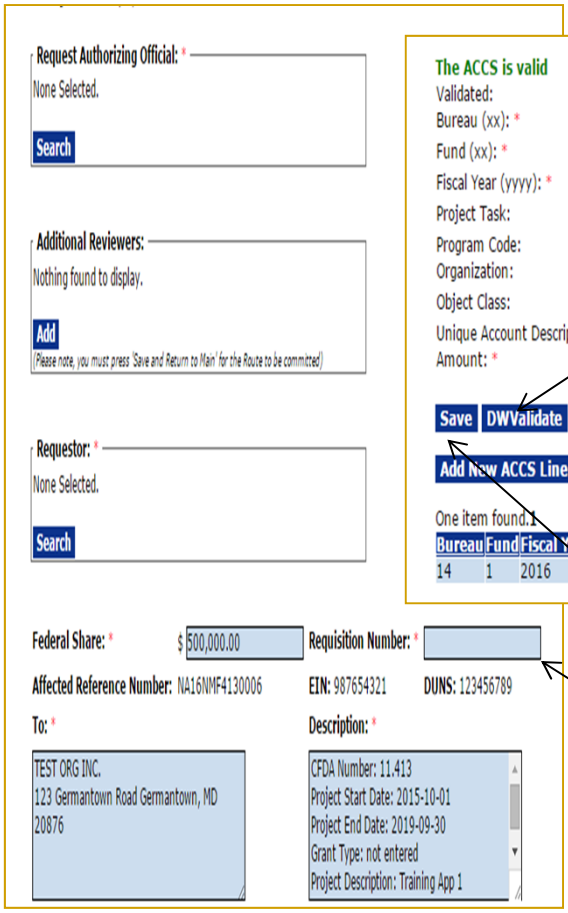
Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status	La
PO Checklist	2245444	05/22/2012	$5,000.00	2012	Complete PO Checklist: Not Started	
NEPA	2245446	05/22/2012	$5,000.00	2012	NEPA Document: Not Started	
Procurement Request and Commitment of Funds	2245443	05/22/2012		2012	Procurement Request 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	

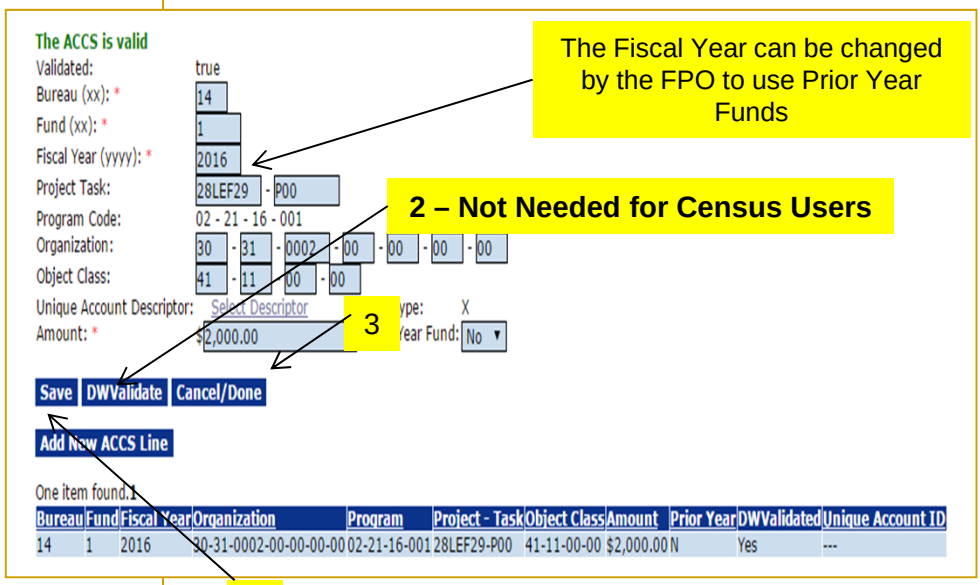
- The Census user will have two (2) new tasks in his/her Inbox. (If there are no new tasks in the Inbox, click the **Inbox** tab to refresh the screen display

- 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 Certifying Official has completed their approval 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.)

- The "Provisional Organization Workflow" in the diagram on the previous page applies only to NOAA awards. A process will be worked out with the Census Finance Office to obtain CBS vendor information to be associated with the Cooperative Agreements.







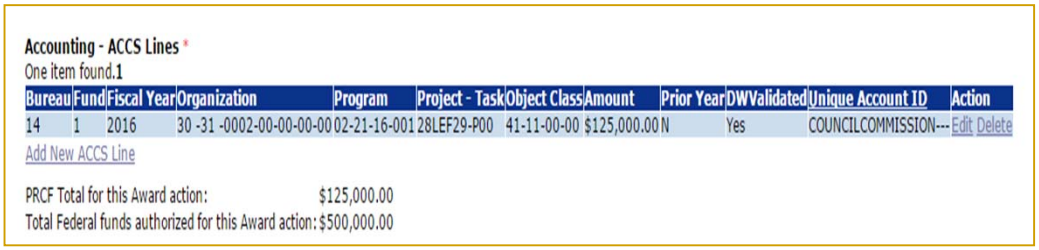
The Fiscal Year can be changed by the FPO to use Prior Year Funds

2 – Not Needed for Census Users

3

1

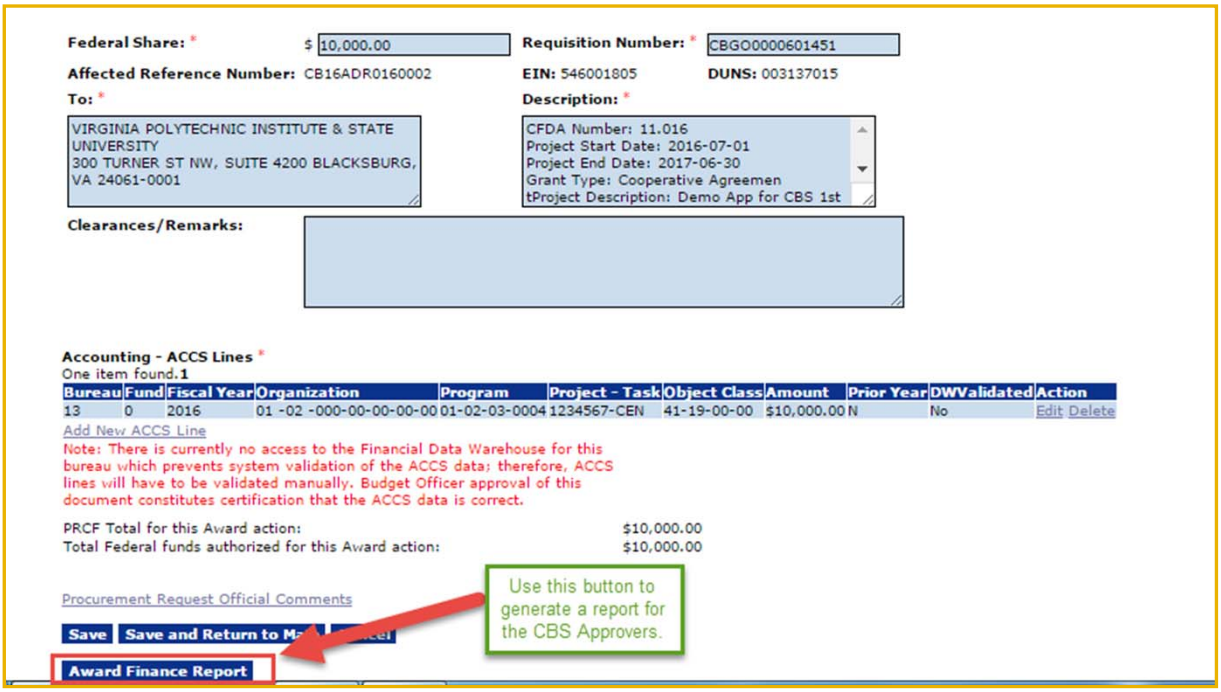
Automatically filled in after Authorizing (Certifying) Official and Requestor have been selected



There are currently no workflow steps for commitments (reservation of funds) for any Bureau except for EDA. Some options for notifying the Finance Office to perform the commitment in CBS are:

1. The Certifying Official can notify the Finance Office when they complete their task in Grants Online. The Federal Program Officer should wait until they have been notified by the Finance Office that the commitment has been completed in CBS before forwarding the Award File to NOAA Grants Management Division. If documentation of the commitment needs to be added to the Award File it can be uploaded as an attachment.

2. The CBS 1st and 2nd approvers can be added to the PRCF as optional reviewers. This will allow them to get a task in Grants Online at which point they could enter the commitment into CBS. The possible drawback of this option is that the Certifying Official will have not yet completed their approval at that point.



Because there are no CBS Data Warehouse tables from Census in Grants to validate ACCS information, the Certifying Official will need to ensure the ACCS codes for obligating the award have been entered correctly.

Grants Online
Award Document Finances

Award Number: CB16ADR0160002
Amendment Number: NotAssigned
Award File Period: 07/01/2016 - 06/30/2017
Final Report Due Date: N/A

Program Office: Center for Administrative Records Research and Applications (CARRA)
Program Officer: CENSUS Federal Program Officer
Email: testemail@msg2.rdc.noaa.gov
Phone: 301-555-1212 EXT-null

Grants Specialist: CENSUS Grants Specialist at NOAA
Email: testemail@msg2.rdc.noaa.gov
Phone: 301-555-1212 EXT-

Grants Officer Not Identified - Award Document Not Signed

Approved Federal Funding: $0.00
Approved Non Federal Funding: $0.00
Project Title: Demo App for CBS 1st and 2nd Approver steps
Recipient: VIRGINIA POLYTECHNIC INSTITUTE & STATE UNIVERSITY
EIN: 54-6001805
DUNS: 003137015
Vendor Number: 0
Vendor ID: 0
Address Type: CCRPUR
Vendor ID: 0
Address Type: CCRDSB

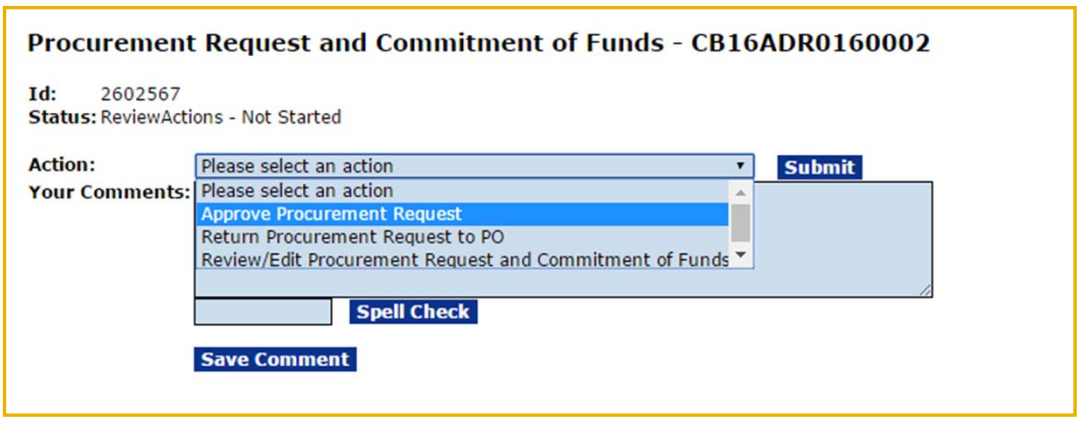
Requisition Number: CBGO0000601451
Amount: $10,000.00
Status: NOT APPROVED - In Progress
Description:
CFDA Number: 11.016
Project Start Date: 2016-07-01
Project End Date: 2017-06-30
Grant Type: Cooperative Agreemen
tProject Description: Demo App for CBS 1st and 2nd Approver steps

Requestor: CENSUS Federal Program Officer **Phone:** 301-555-1212 **Email:** testemail@msg2.rdc.noaa.gov

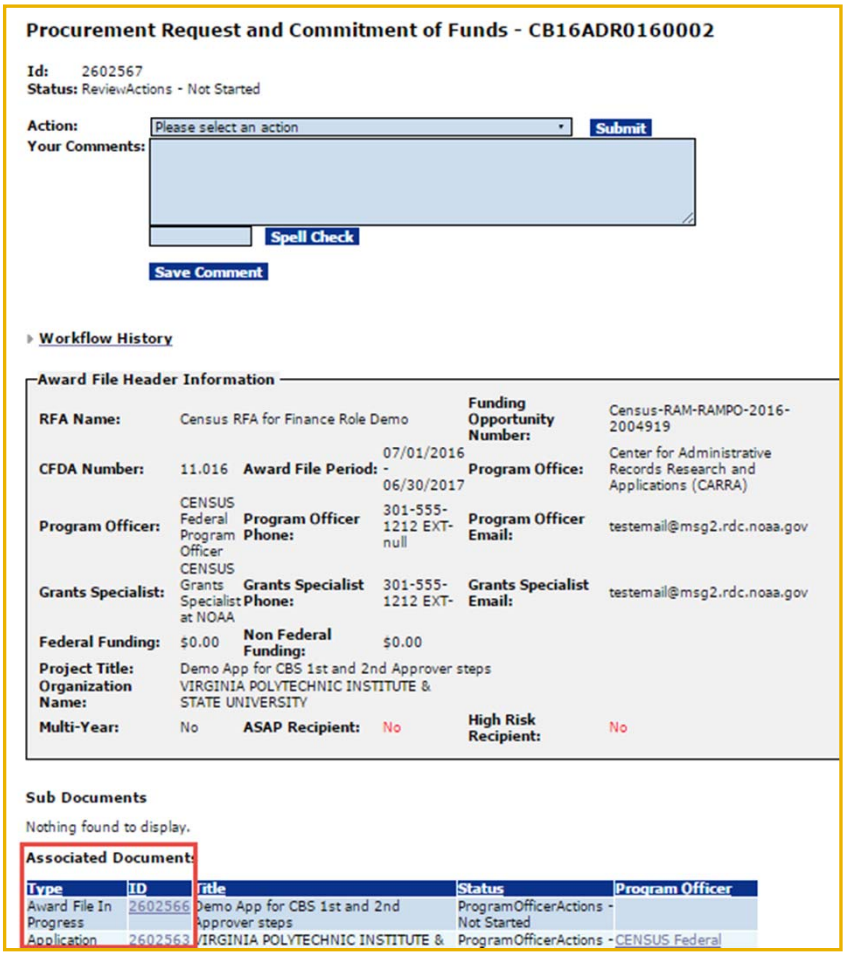
Request Authorizing Official: CENSUS Official **Phone:** 301-555-1212 **Email:** testemail@msg2.rdc.noaa.gov

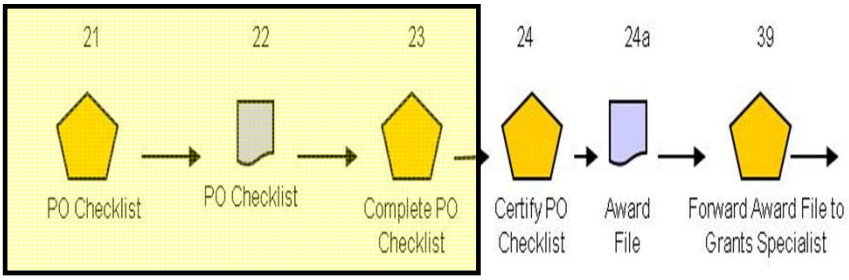
Bureau	FY	Fund	Program	Project - Task	Organization	Object Class	Amount	Unique Account ID
13	2016	0	01-02-03-0004	1234567-CEN	01-02-000-00-00-00-00	41-19-00-00	$10,000.00	N/A - Regular Account

The Vendor Control staff at the Finance Office may provide the vendor information to the Grants Online Help Desk to be added to the Organization Profile for future reference. This will be used by the CBS 1st and 2nd approvers to obligate the award. This information will also be useful when making future awards to the same recipient.



Both the “Requester” and the “Budget Officer/Authorizing Official (Certifying Official)” will have similar tasks in Grants Online to Review and Approve the PRCF. Between the Requester and Certifying Official can be any number of Additional Reviewers who will get the tasks sequentially in the order in which they are listed and each must complete their task before the workflow moves forward. They can navigate to other parts of the Award File from the Procurement Request task. (See below.)





PO Checklist - NA14GOT9990103

Attachments:

No attachments.

Add new Attachment: [+]
Any changes to information on this page should be saved before adding or remo
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

Statutory Authority * Guidance Audit Trail:

Project Description/Abstract * Guidance

Spell Check

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

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

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 Del

Add New

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.

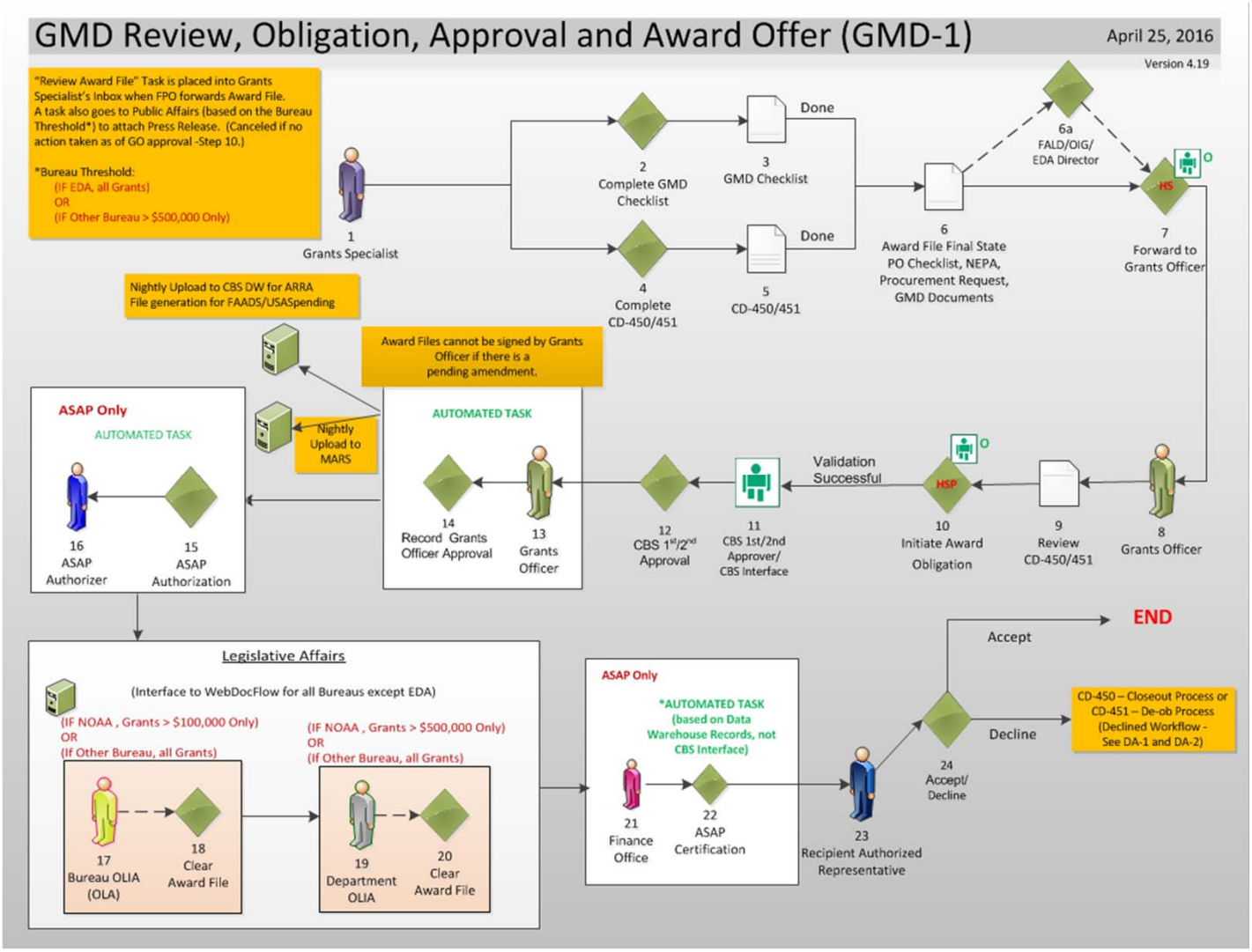
- Matching Requirements –

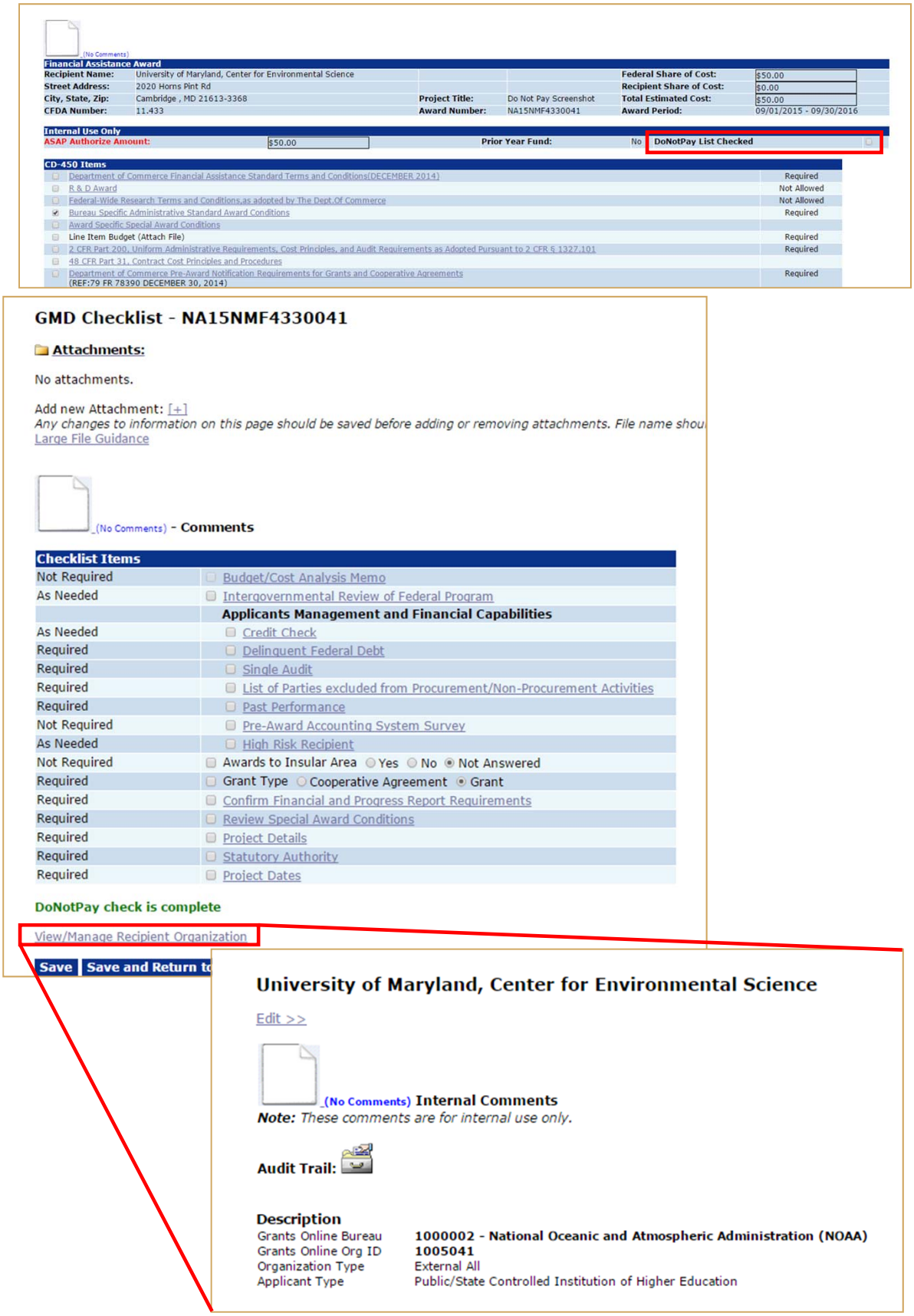
    a. If using a ratio, remember that the number on the left of the colon plus the number on the right of the colon equals to the total number of even parts. (Ex: 1:4 ratio means that the award total is divided into 5 equal parts with the recipient contributing a match of 1 part for every 4 parts of the 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).

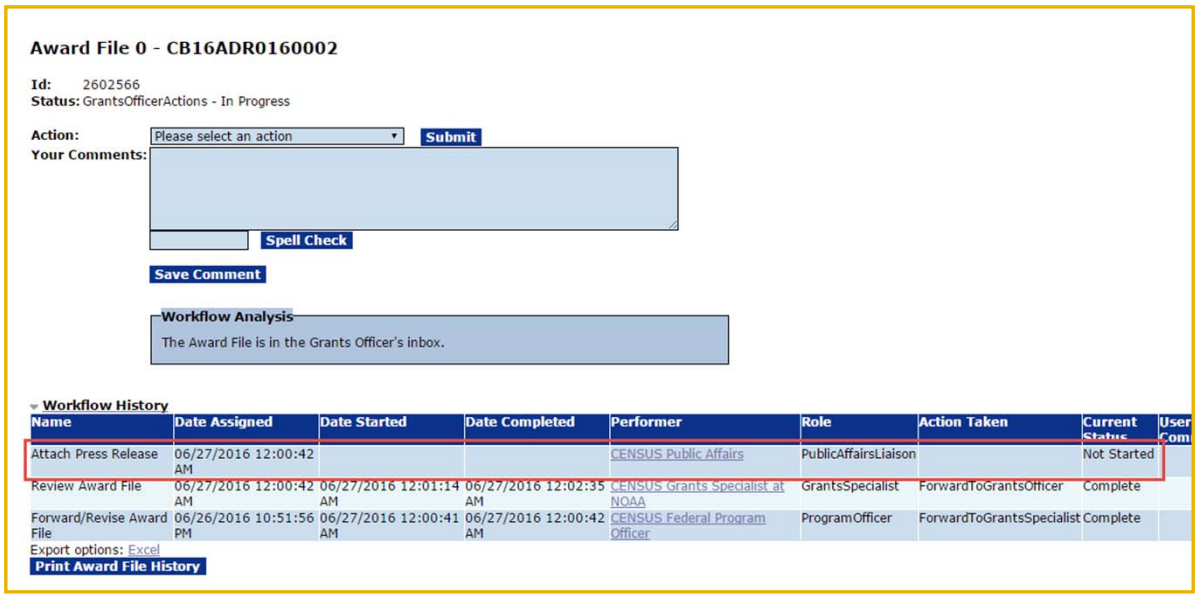
- The correct "Special Award Conditions" links must be used for Grants Online to associate the condition with that item in the "PO Checklist." The "Special Award Conditions" at the bottom of the page should be used only for additional programmatic award conditions not covered elsewhere on the page.

Grants Management Process





The NOAA Grants Specialist will complete the Award Offer page (CD-450) as well as their own checklist. They will also review the Organization Profile in Grants Online before sending the package to the Grants Officer for final approval.



Award File 0 - CB16ADR0160002

Id: 2602566
Status: GrantsOfficerActions - In Progress

Action: Please select an action **Submit**
Your Comments:

Spell Check

Save Comment

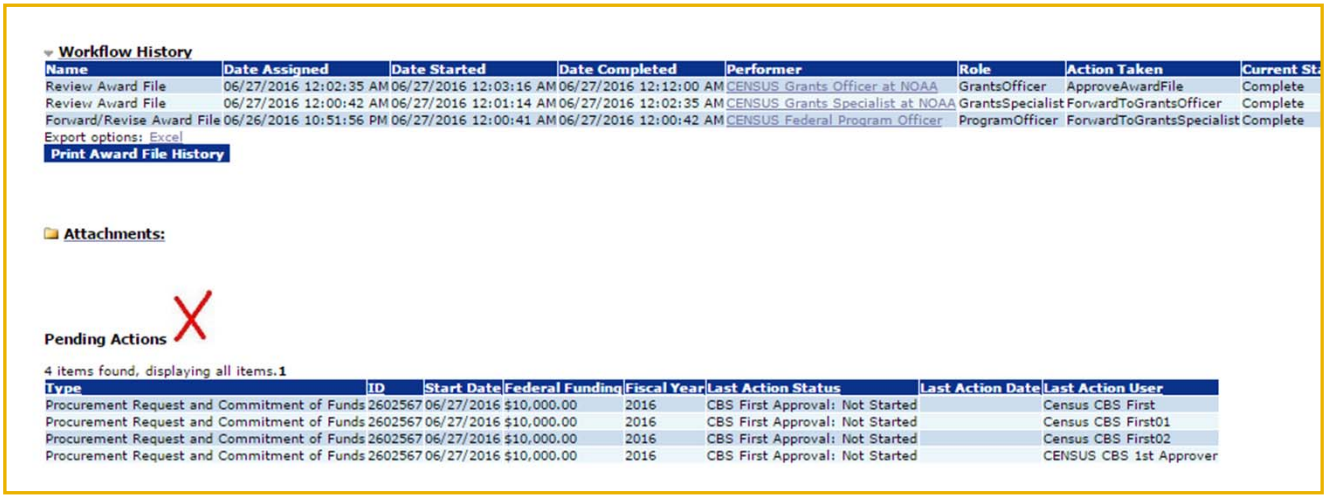
Workflow Analysis
The Award File is in the Grants Officer's inbox.

Workflow History

Name	Date Assigned	Date Started	Date Completed	Performer	Role	Action Taken	Current Status	User Com
Attach Press Release	06/27/2016 12:00:42 AM			CENSUS Public Affairs	PublicAffairsLiaison		Not Started	
Review Award File	06/27/2016 12:00:42 AM	06/27/2016 12:01:14 AM	06/27/2016 12:02:35 AM	CENSUS Grants Specialist at NOAA	GrantsSpecialist	ForwardToGrantsOfficer	Complete	
Forward/Revise Award File	06/26/2016 10:51:56 PM	06/27/2016 12:00:41 AM	06/27/2016 12:00:42 AM	CENSUS Federal Program Officer	ProgramOfficer	ForwardToGrantsSpecialist	Complete	

Export options: Excel
Print Award File History

When the Census Federal Program Officer forwards the Award File to NOAA Grants Management Division a task is also created for the Census Public Affairs Liaison. This task will remain available until the NOAA Grants Officer approves the award. At that point, if no action has been taken by the Public Affairs staff, their task will be cancelled. (Note: This is different from the Legislative Affairs task that comes AFTER the Grants Officer approval and obligation by the Finance Office.)



Workflow History

Name	Date Assigned	Date Started	Date Completed	Performer	Role	Action Taken	Current St
Review Award File	06/27/2016 12:02:35 AM	06/27/2016 12:03:16 AM	06/27/2016 12:12:00 AM	CENSUS Grants Officer at NOAA	GrantsOfficer	ApproveAwardFile	Complete
Review Award File	06/27/2016 12:00:42 AM	06/27/2016 12:01:14 AM	06/27/2016 12:02:35 AM	CENSUS Grants Specialist at NOAA	GrantsSpecialist	ForwardToGrantsOfficer	Complete
Forward/Revise Award File	06/26/2016 10:51:56 PM	06/27/2016 12:00:41 AM	06/27/2016 12:00:42 AM	CENSUS Federal Program Officer	ProgramOfficer	ForwardToGrantsSpecialist	Complete

Export options: Excel
Print Award File History

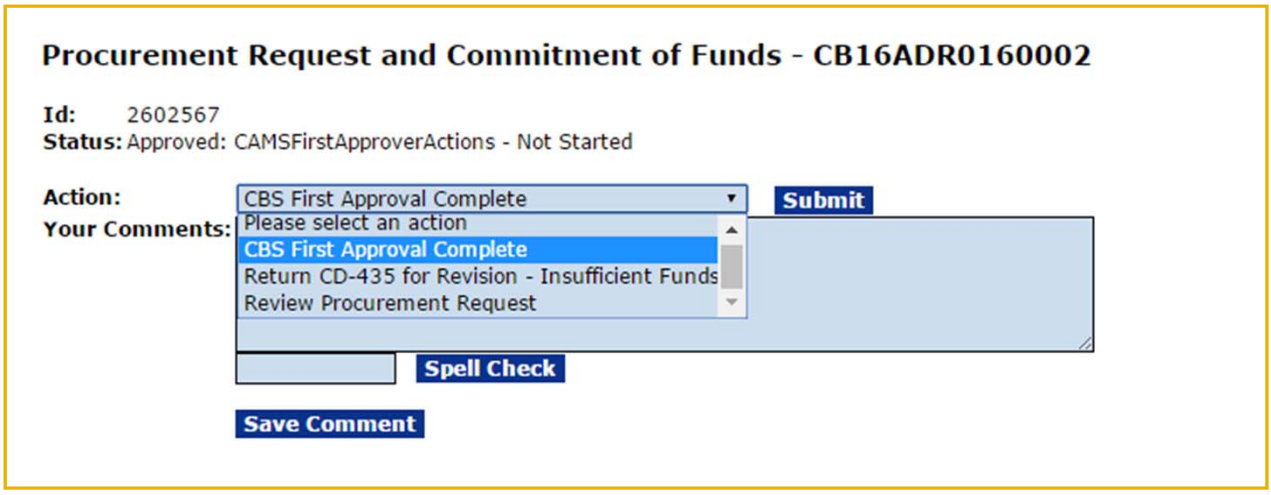
Attachments:

Pending Actions

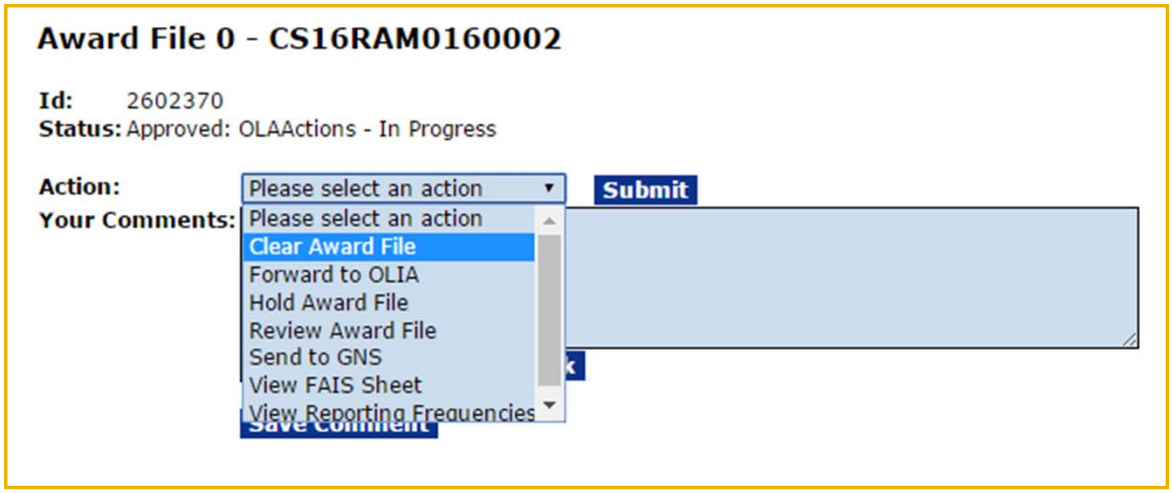
4 items found, displaying all items.1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status	Last Action Date	Last Action User
Procurement Request and Commitment of Funds	2602567	06/27/2016	$10,000.00	2016	CBS First Approval: Not Started		Census CBS First
Procurement Request and Commitment of Funds	2602567	06/27/2016	$10,000.00	2016	CBS First Approval: Not Started		Census CBS First01
Procurement Request and Commitment of Funds	2602567	06/27/2016	$10,000.00	2016	CBS First Approval: Not Started		Census CBS First02
Procurement Request and Commitment of Funds	2602567	06/27/2016	$10,000.00	2016	CBS First Approval: Not Started		CENSUS CBS 1st Approver

After Grants Officer approval of the Award File, all users with a role of "CBS 1st Approver" will get simultaneous tasks. When the first person takes action, the others will be cancelled. It works the same way for the CBS 2nd Approver task.



When the CBS 1st and 2nd Approvers get their tasks in Grants Online they can access the information they need by selecting the option to "Review Procurement Request". That will bring them to the screen where they can generate the Award Finance Report. (See earlier slides for the PRCF.) Once the required action has taken place in CBS, the users will need to return to Grants Online to complete their task and move the Award File to the next step of the workflow.



Unlike the CBS Approvers, only one user with the Legislative Affairs (OLA or OLIA) roles will get those tasks, even if multiple users have the roles. The Grants Online Help Desk can reassign the task if requested. The OLA task (and OLIA if used) will need to be cleared in order for the Award to reach the recipient's inbox for acceptance. If the system is interfaced with WebDocFlow, the OLA and OLIA users will log into that system ***instead*** of Grants Online.

Grants Online Training for US Census Bureau

Competitive RFA/FFO for Broad Agency Announcement (BAA)

June 2016

Steps for setting up the BAA Process in Grants Online:

1. The Bureau sets up a Competitive RFA/FFO under their Headquarters Line/Program Office with one competition for each separate Line/Program Office that needs to receive the applications.

2. A Universal BAA RFA is set up for each Line/Program office to correspond with each competition under the Competitive RFA/FFO.

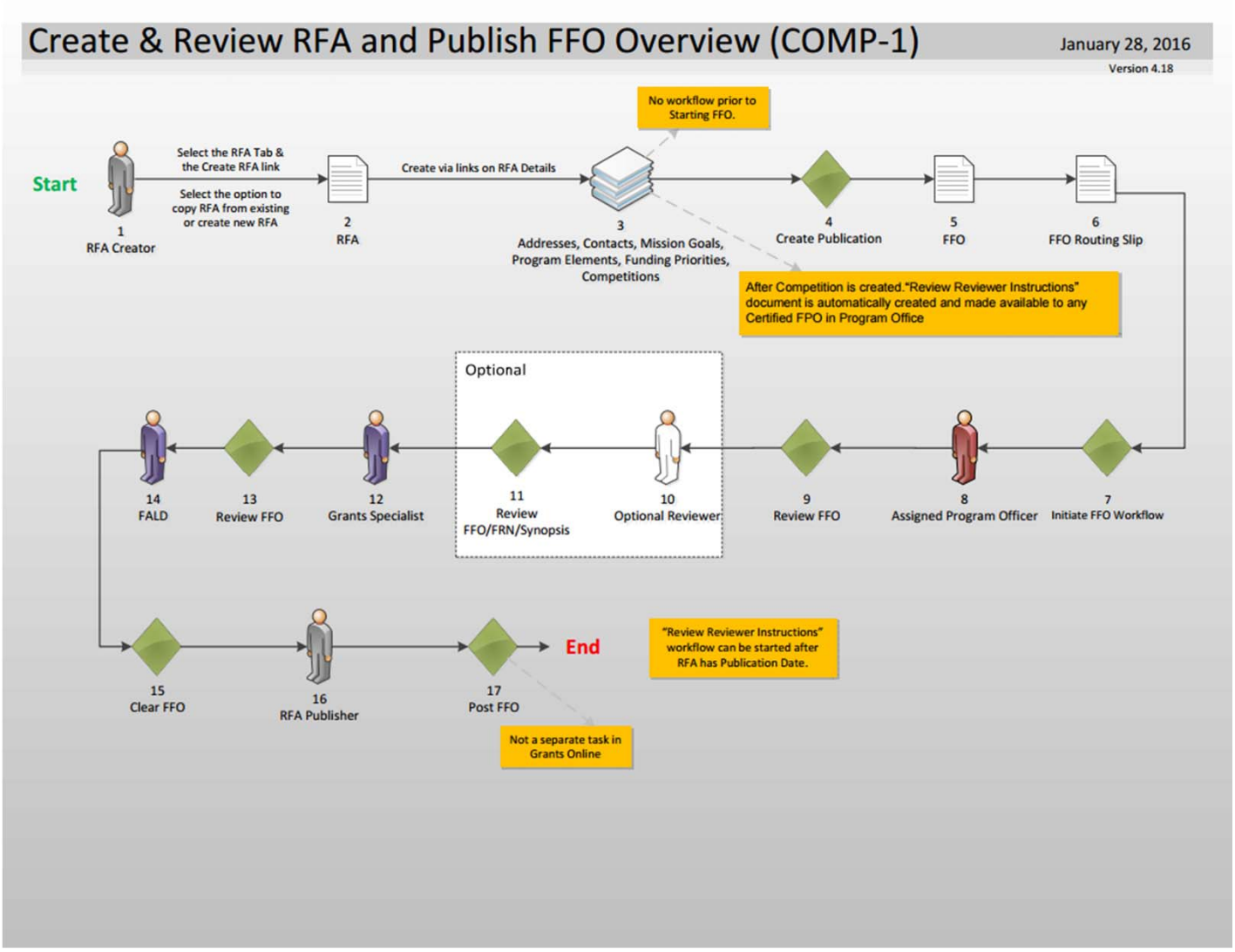
3. One person is assigned to receive the applications for each competition under the Competitive RFA/FFO, and the same person is assigned to receive the applications when they move to the corresponding Universal BAA RFA. That person should have FPO roles under both the Headquarters Program Office and the Program Office that will receive the transferred application. (The system will only reassign the application to the new RFA but currently does not reassign the Program Officer).

4. The Grants Online Help Desk will enter the Competitive and Universal BAA RFAs into a table in the system to facilitate the movement of the applications.

5. A background procedure is run approximately every two hours to transfer applications from the Competitive BAA announcement to their associated Universal BAA RFA.

6. The Program Office that received the transferred application can use the "Reassign Program Officer on Awards or Applications" function to reassign the transferred application to the appropriate FPO user.

Competitive Process – RFA Creation



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

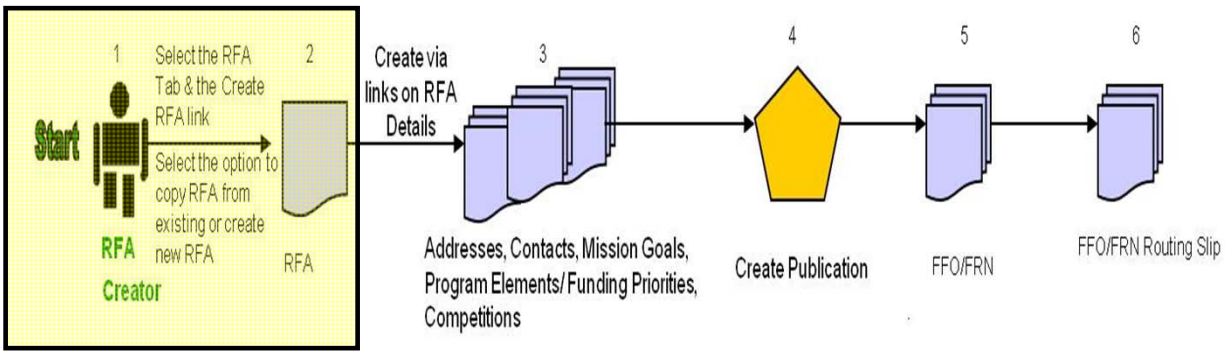
- **Opportunity Number –** ***Federal Opportunity Number***
- **Opportunity Title –** ***RFA Name***
- **Opportunity Category –** ***(Competitive RFA ➔ "Discretionary"; Universal RFA ➔ "Other")***
- **Category Explanation – (If Opportunity Category is "Other"):** ***RFA Type***
- ***CFDA Number***
- **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 Name*	
Fiscal Year* (YYYY)	
Announcement Type	Initial
Anticipated Publication Date* (MM/DD/YYYY)	
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

** Competitive Only

RFA Header Information

Document ID	2147932
RFA Name*	Sample RFA for FPO Training
Fiscal Year* (YYYY)	2009
Announcement Type	Initial
Anticipated Publication Date* (MM/DD/YYYY)	04/24/2009
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-

** Competitive Only

- 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.

- For class, choose **Center for Administrative Records Research and Applications (CARRA)** 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 (“CENSUS”)

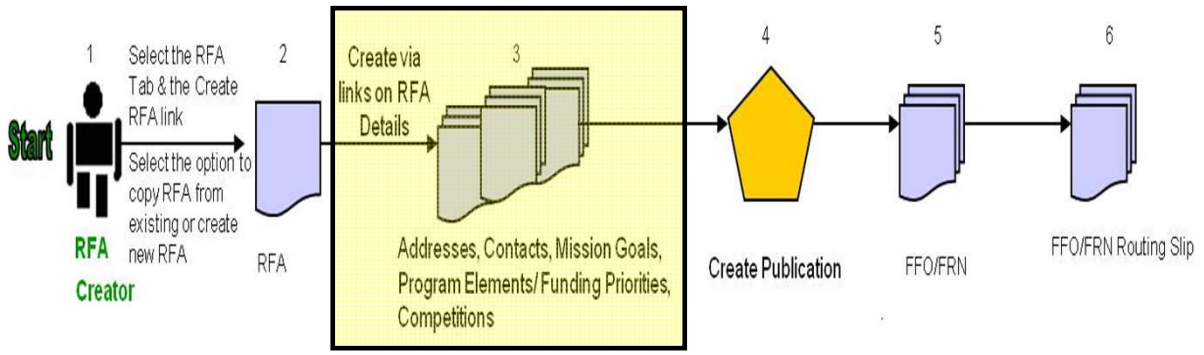
  Second component – Line Office (for training – “ADR”)

  NOTE: For organizations where the Bureau and Line Office are the same, the Line Office is not included

  Third component – Program Office (for training – “CARRA”)

  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: OCPO

Street Address:

City:

State: Please select a state

Zip:

Search

Search Results

Nothing found to display.

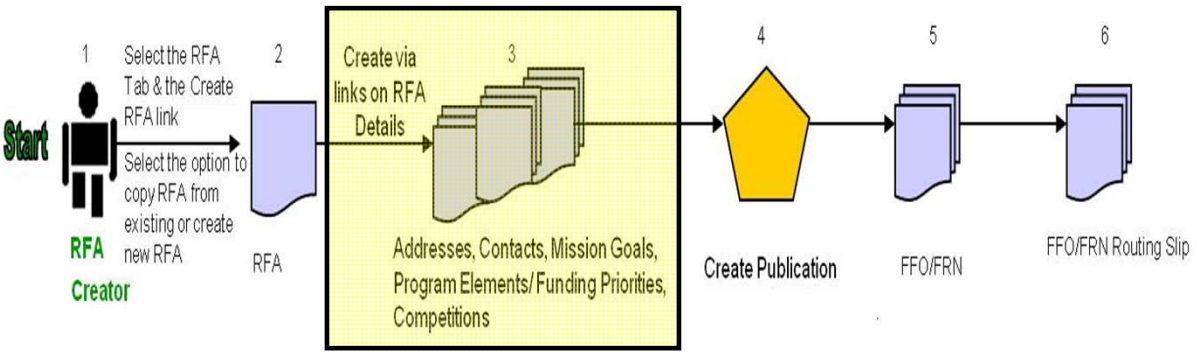
Add to RFA

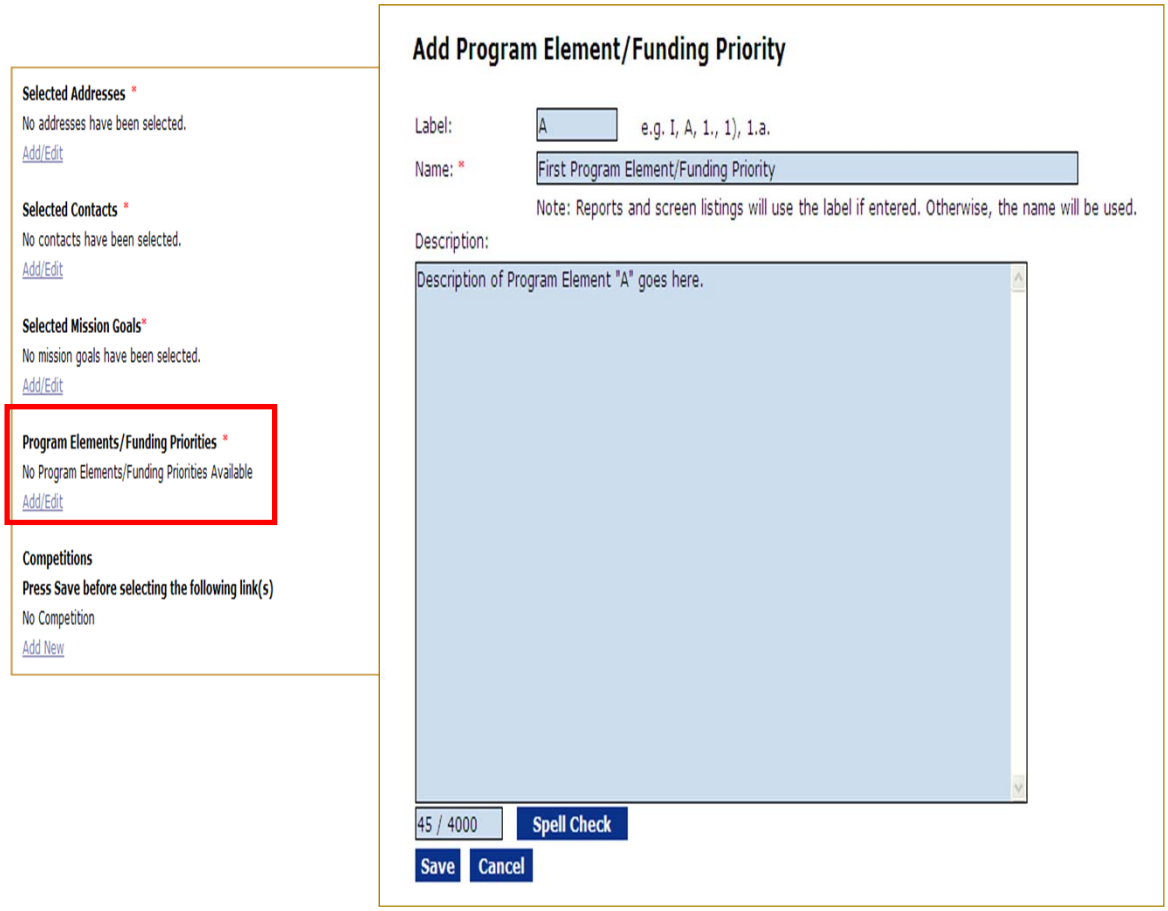
Selected Addresses for this RFA

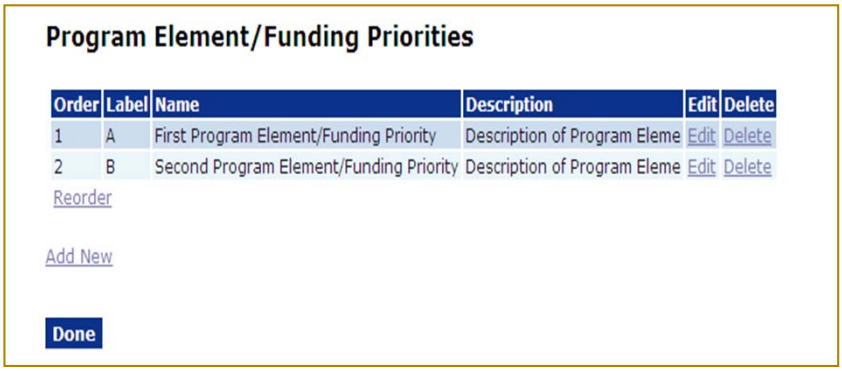
Nothing found to display.

Remove from RFA

Done

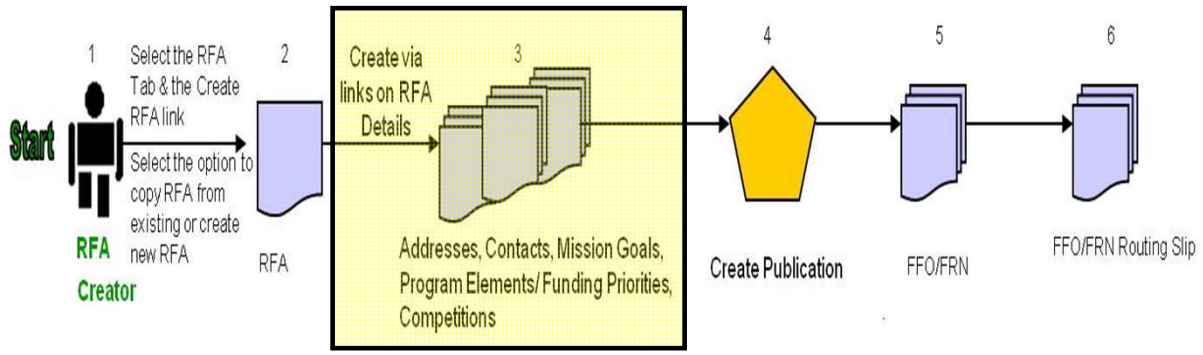






Program Elements can be assigned custom labels. Applications that will later be associated with this RFA can be linked to one (and only one) of the Program Elements defined at this step.

Prior to adding details for the Competition, be certain to save the data entered thus far for the RFA.



Competition Name * Sample Competitive RFA for FPO Training Fiscal Year * 2009

Competition Type * ○ Group ○ Individual Qualification

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

Competition Manager * NOAA Student

Save Cancel

Competition Name * Comp RFA for Feb 2011 Training Screen Shots - \ Fiscal Year * 2011

Competition Type * ◉ Group ○ Individual Qualification

Assigned Program Office* GOT One Commerce Program Office (OCPO)

Competition Manager * Grants Student

Selecting Official * -Select a Selecting Official-

	Min	Max
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: PM Eastern

Application * Due Date Time: PM Eastern

Anticipated Award Date * Days after Application Due Date

View Anticipated Competition Schedule

Review Criteria Type: * ◉ Agency Standard ○ Fellowship Guidance

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.***

Save Save and Return to Main Cancel

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

NOTE: Please reference the expanded version of the Special Award Conditions data entry screen in the Universal Processing section.

- 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. ***(Used for BAA Competitions)***

- 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.

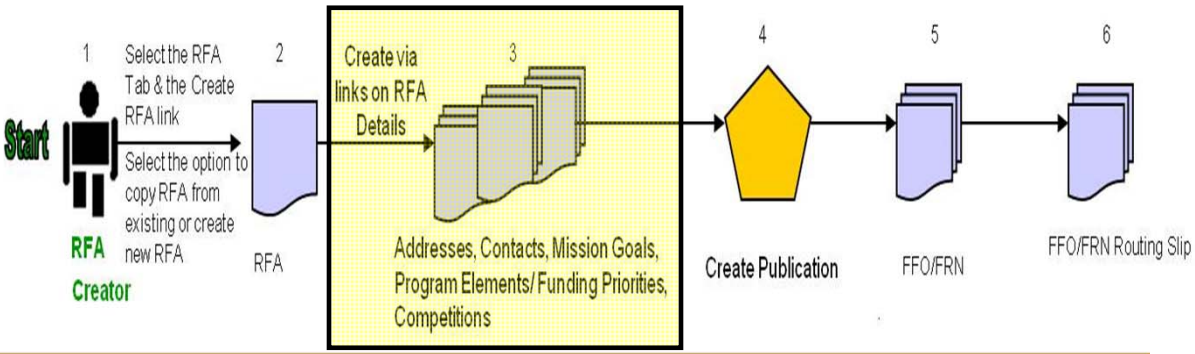
  1. Choose the Selecting Official.

  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 two Award File tasks: 1) the PO Checklist and 2) Procurement Request. 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 1 - Merit Review

Review Event Manager:* System User

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:* 10/01/2014

Anticipated Review End Date:* 12/31/2014

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

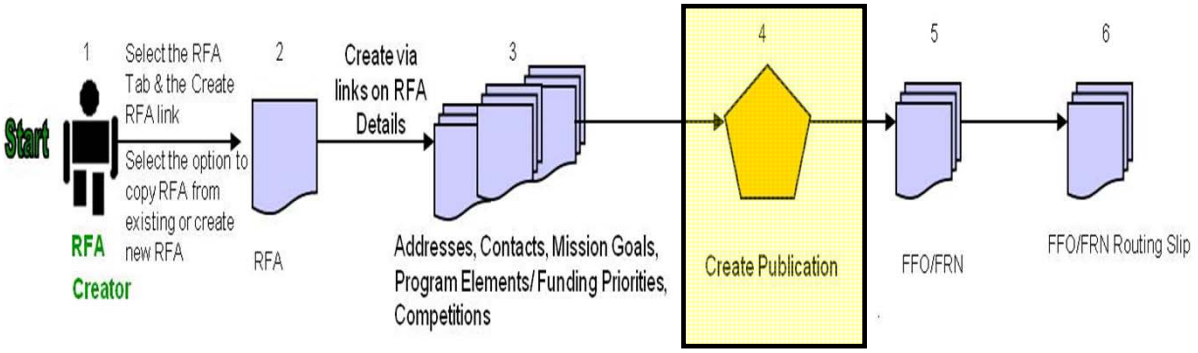
Add New >> Reorder >>

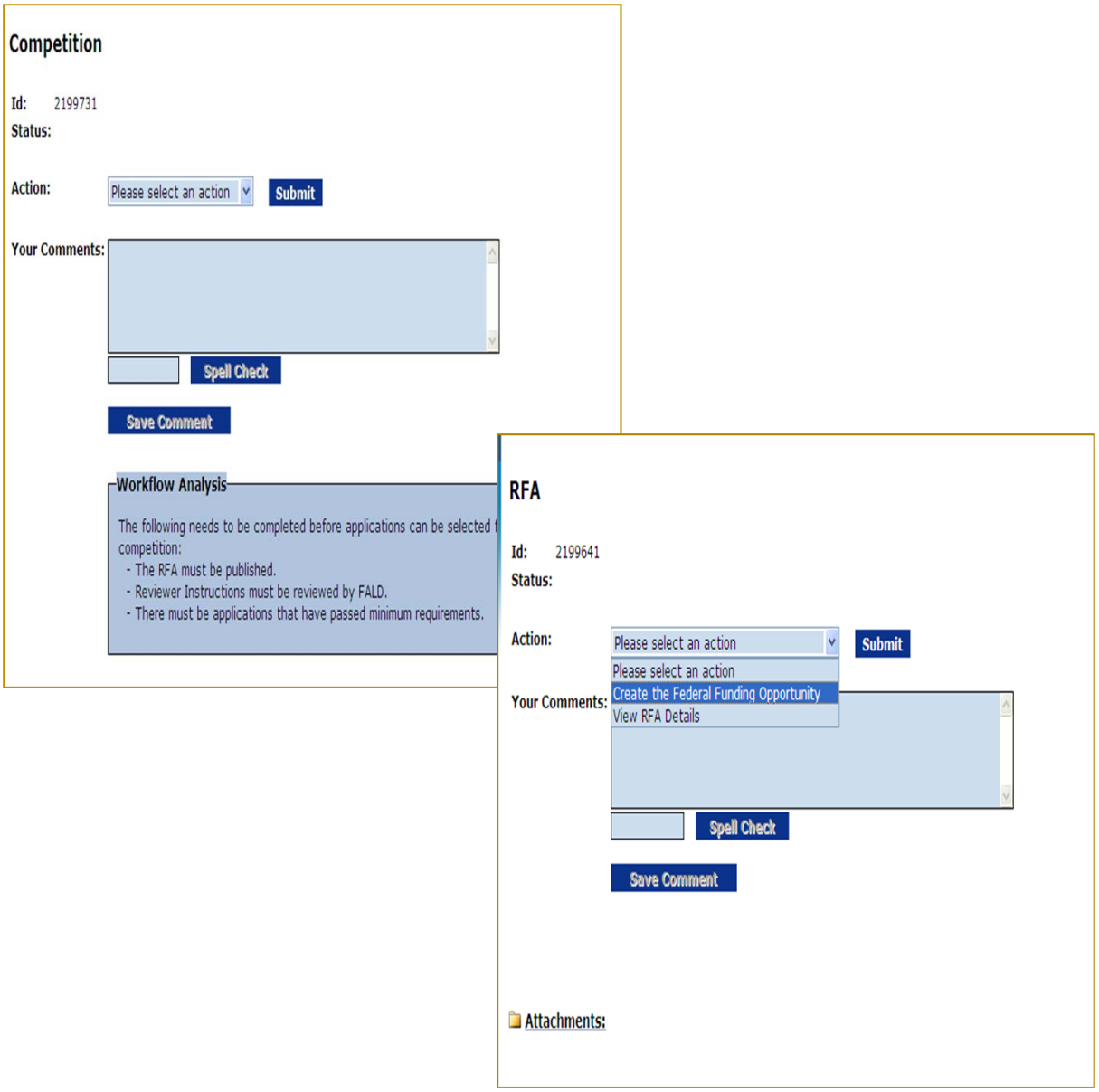
FFO Evaluation Criteria Report Application Review Scoring Sheet

Save | Save and Return to Main | Cancel

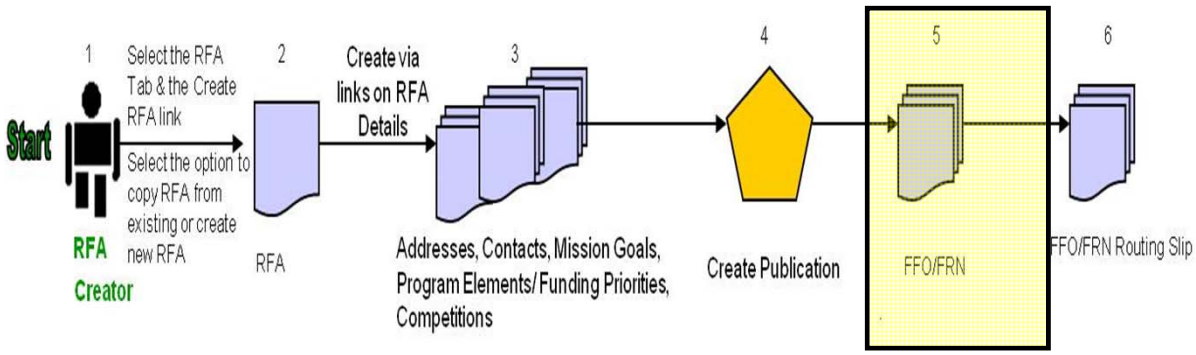
At this point, you need to know some basic information regarding the Review Event(s). These details should reflect the information posted in the FFO regarding evaluation criteria and, for the most part, should not be changed after the FFO has been posted. The Review Event start and end dates can be modified 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).





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) 0000

Executive Summary

Federal Agency Name Grants Online Training (GOT), National Oceanic and A

Funding Opportunity Title Competitive Test -- August 2015

Announcement Type Initial

FFO Number NOAA-GOT-OCPO-2014-2003461

Catalog of Federal Domestic Assistance (CFDA) Number 11.999, Grants Online Training Program

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

ederal Funding Opportunity (FFO). The FFO will be available on Gra
All grant programs must continue to develop FFO announcements, w
a and selection procedures, and to make it available on Grants.gov. T
Counsel for Legislation and Regulation (L&R), those FFO announce
&R may coordinate the review and clearance of those announcements

ory or regulatory requirements to publish a Notice of Funding Availa
f required to do so by any law or regulation. For these situations, Gra

Grants.gov throughout the fiscal year. Federal Program Officers are re
your FFO being routed to FALD.

quired by the Office of Management and Budget. Additionally, the D
e a required standard format, modeled on the FFO, for the Federal Re
Register Notice.

rmat of the Federal Funding Opportunity details page that you will se
which will be posted at Grants.gov. Fields on the FFO page that are r

- 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.

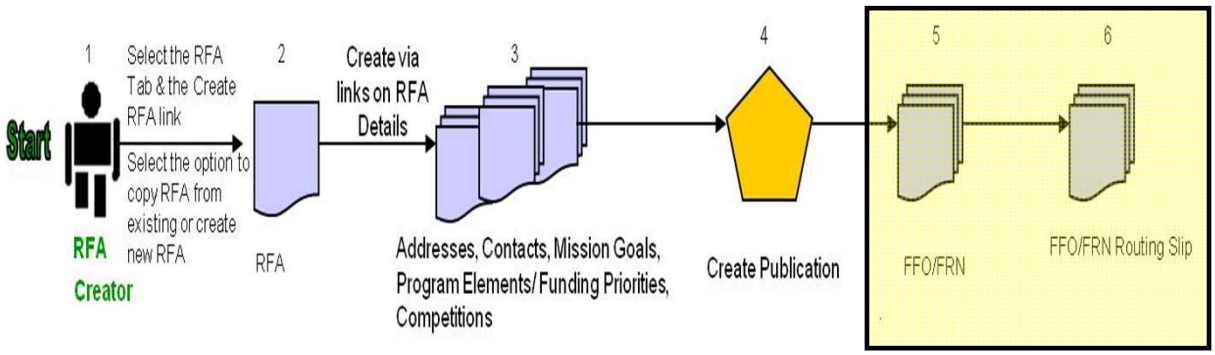
- To have both windows open on one screen right click the **Guidance Documents** link and specify it should be opened in a new window. Resize both windows so the FFO screen and guidance screen can be displayed side-by-side. Use the samples from the guidance document to complete information for the FFO. 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 XX DAYS AFTER PUBLICATION> (with XX being the desired number of days). 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.



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
AssignedProgramOfficer	Grants 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

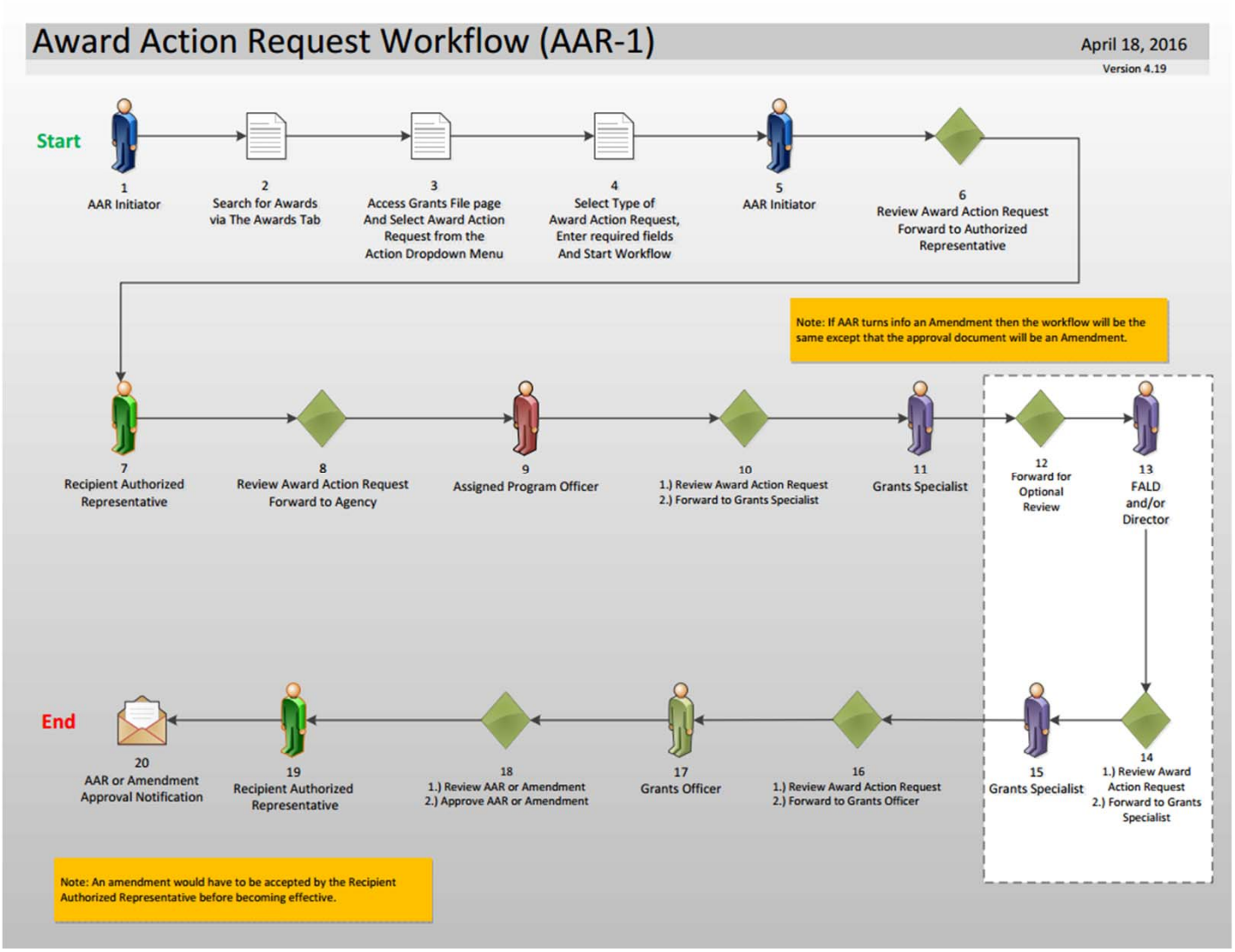
The only customizable portion of the FFO Routing slip is the Optional Reviewer section. The Assigned Program Officer is copied from the RFA details. The Grants Specialist is the current lead Grants Specialist in for the user's Line Office and CFDA Number. When the FFO goes to FALD and to the RFA Publisher, 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

Post Award Processing

May 2016

Award Action Request (AAR)



Award Action Request Index Page

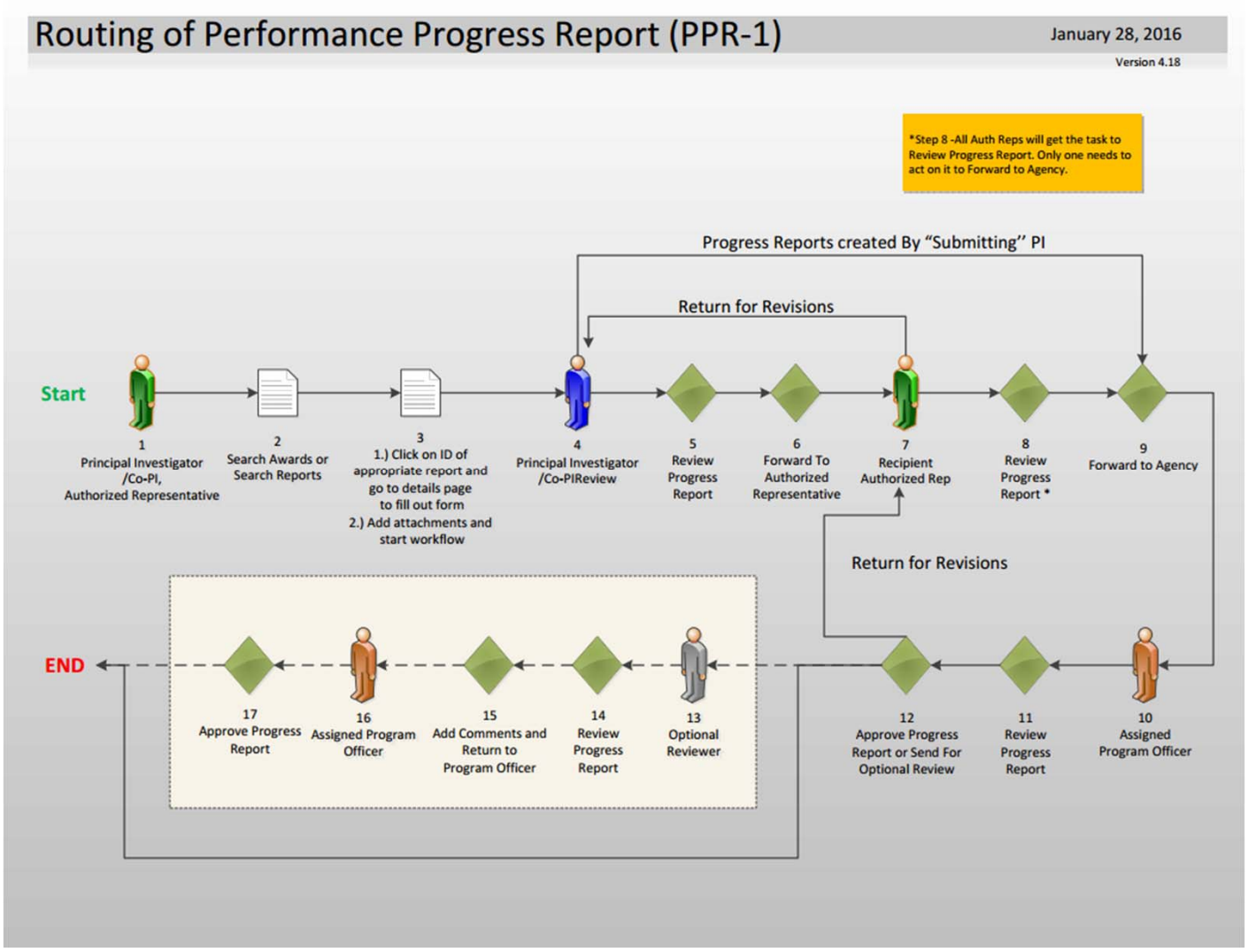
Award Action Requests marked with an asterisk (*) will always result in an amendment to the award (if approved). Other requests generally result in a notification of approval. However, any request may result in an amendment at the discretion of the Grants Officer. Please refer to the Guidance document 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

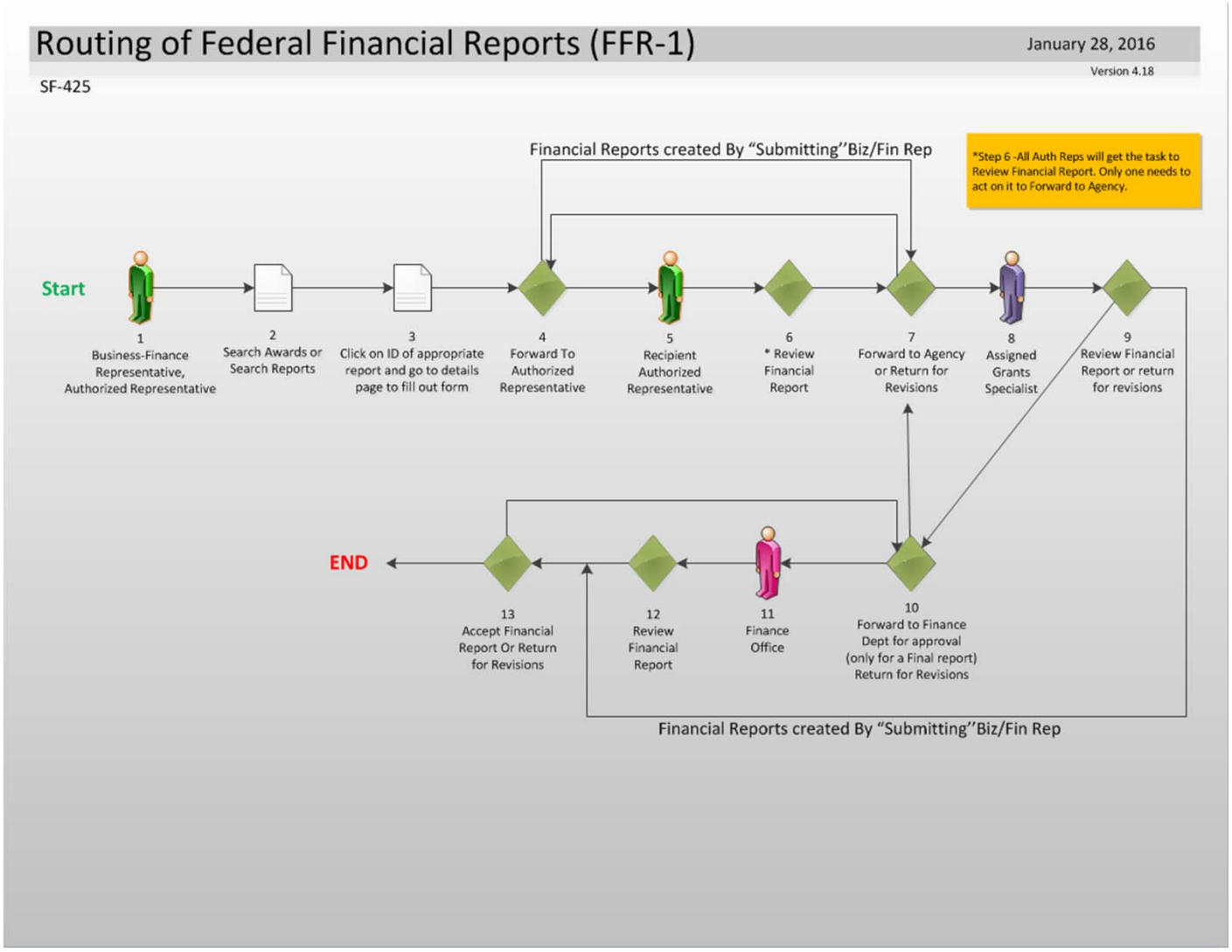
No Cost Extension - Prior Approval Waived (Research Terms and Conditions)
Reprogram or Rebudget
Equipment Purchase
Foreign Travel
Sole Source Contract
Absence of more than 3 months or 25% by project director or PI
Inclusion of cost that require prior approval based on cost principles
* Sub award, transfer 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)

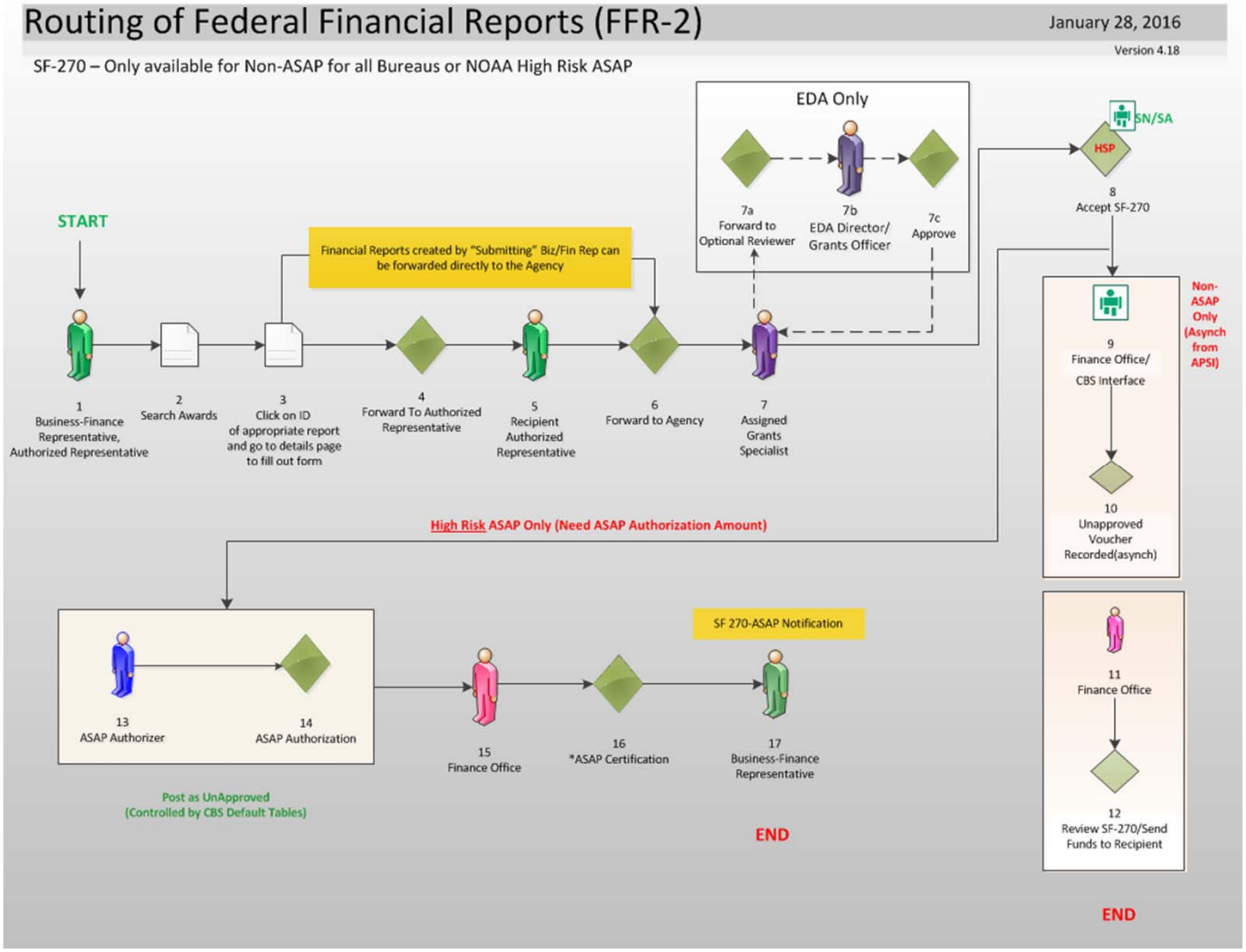


Federal Financial Report (FFR #1)

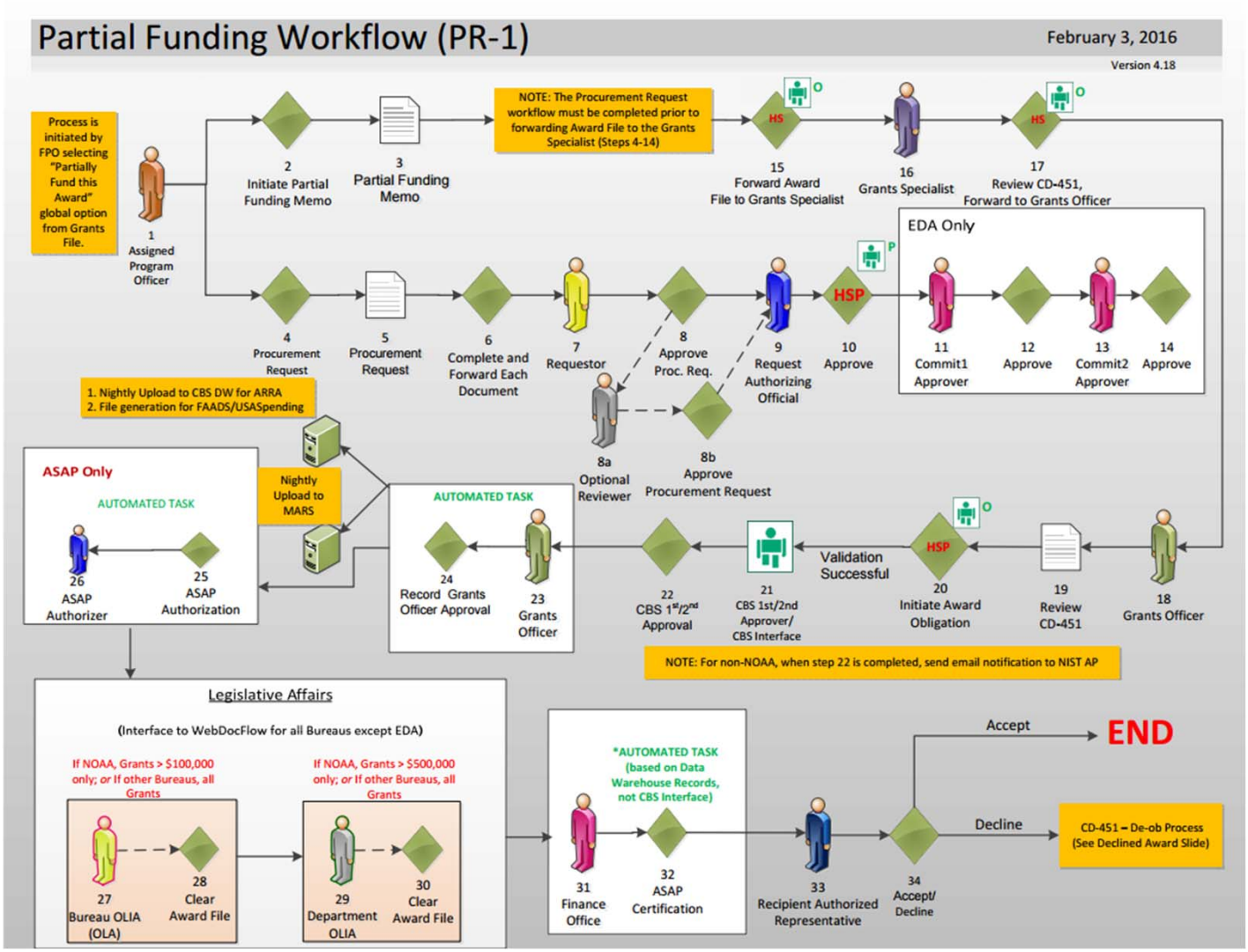


Within NOAA, the user is only required to complete two fields (Cash Receipt & Cash Disbursements) for the interim Federal Financial Report; however for the final Federal Financial Report, all fields need to be completed. All other Bureaus are required to complete all fields on both the interim and final Federal Financial Reports.

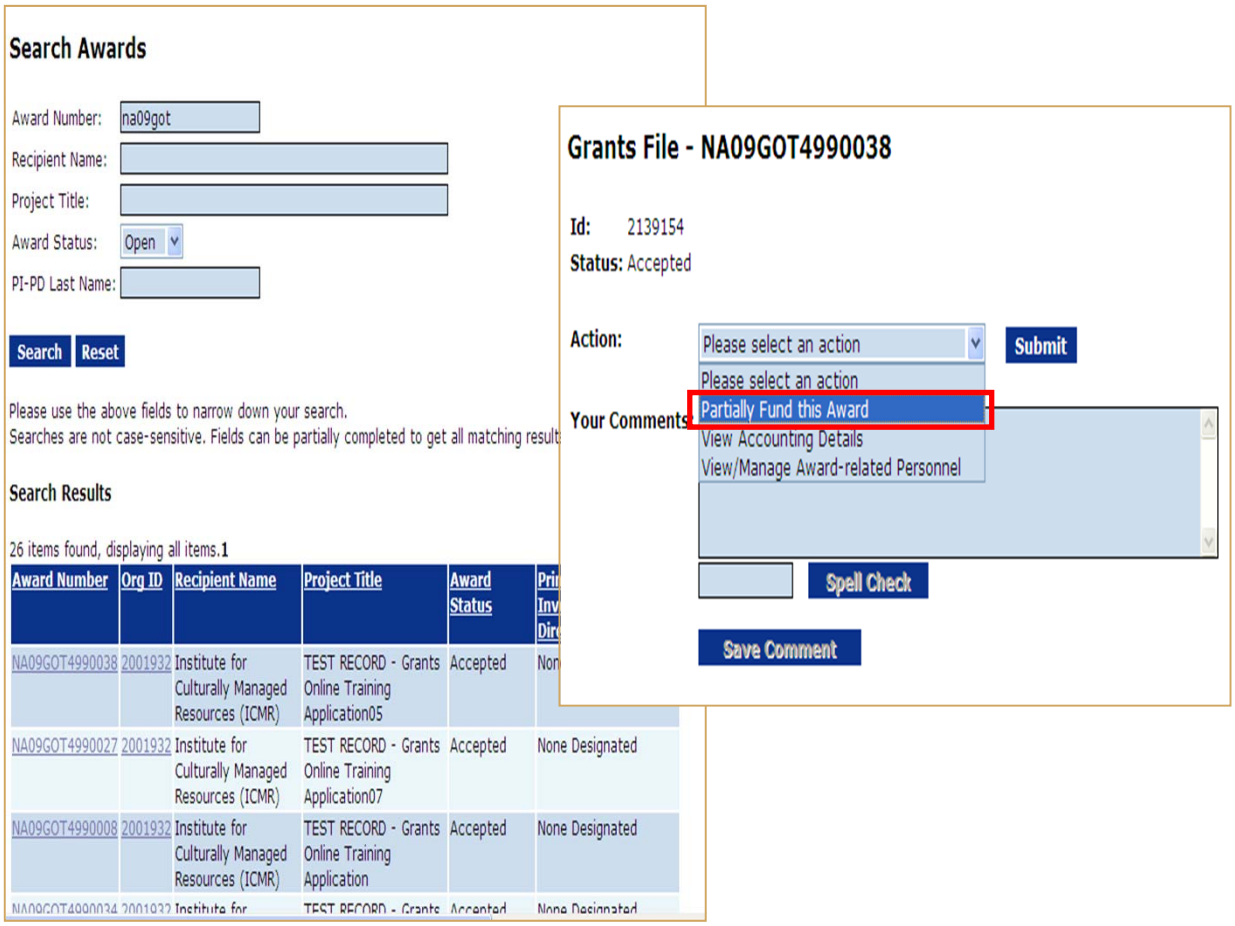
Federal Financial Report (FFR #2)



Partial Funding



FPO – Partial Funding Steps 1 – 3

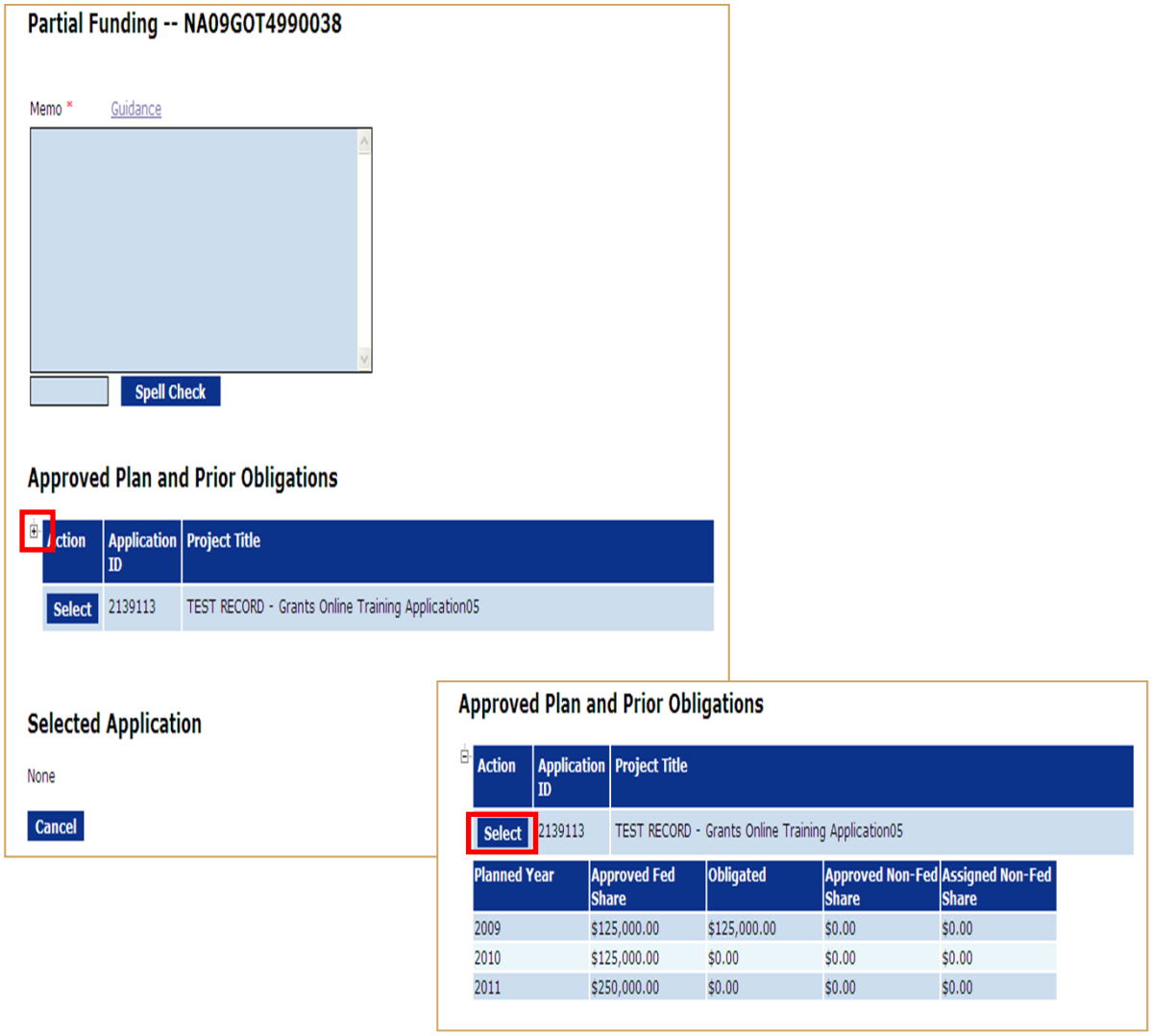


1. From the Award Tab, search for the Award that will be Partially Funded.

2. From the Grants File Launch Page choose **Partially Fund this Award** from the Action dropdown list.

3. Click the **Submit** button.

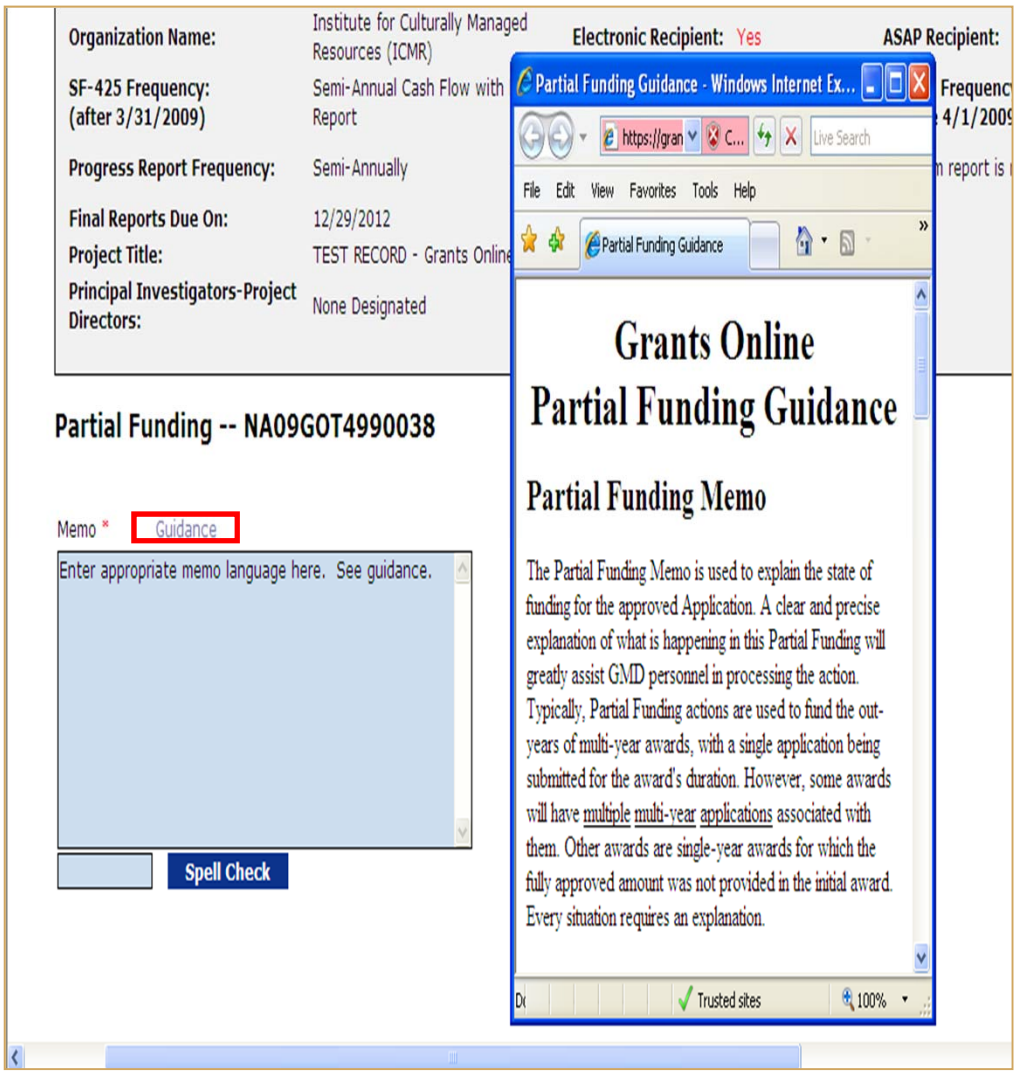
FPO – Partial Funding Steps 4 and 5



4. 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.)

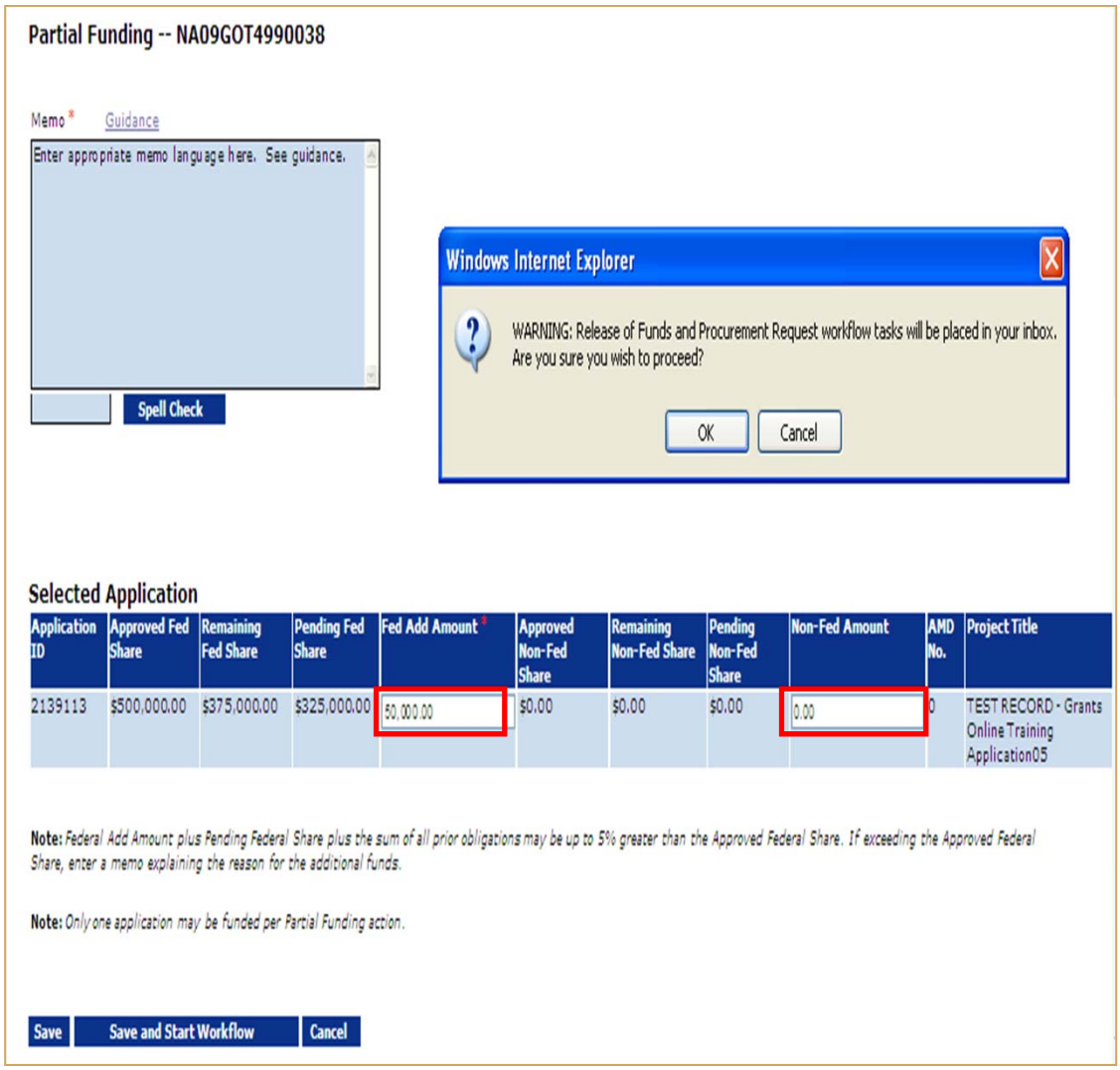
5. Click the **Select** button to chose the desired application.

FPO – Partial Funding Step 6



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

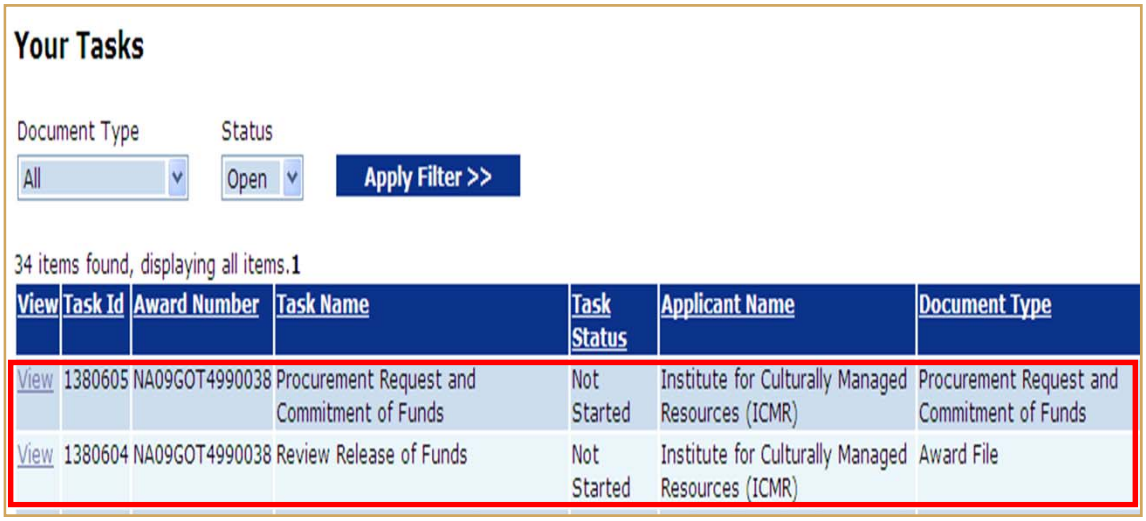


7. Enter the amount for Partial Funding into the “Fed Add Amount” box and, if appropriate, the amount for the “Non-Fed Amount.”

8. Click **Save and Start Workflow**.

9. 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



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

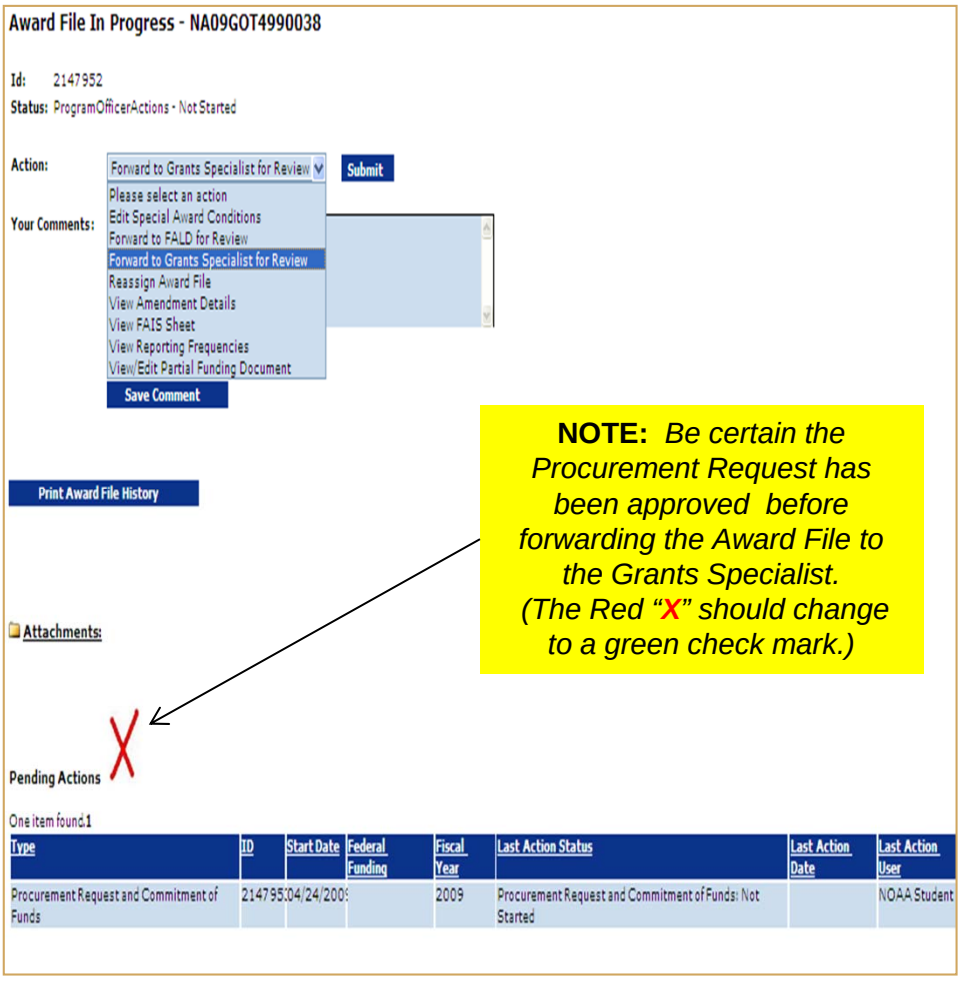
10. Navigate to the “Inbox/Task” screen. There should be two new tasks:

    (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



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…

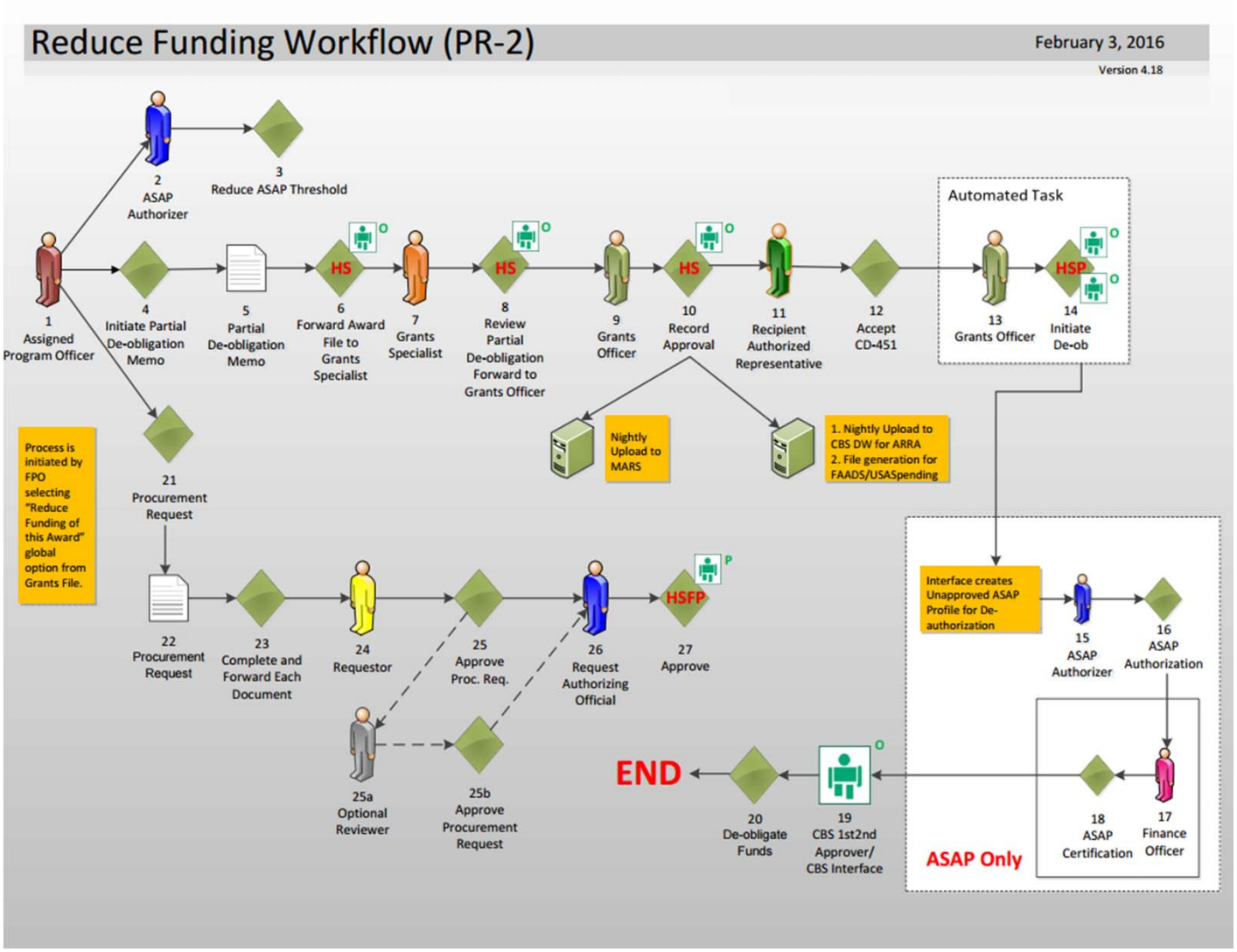
- (EXAMPLE 4*) This release… Due to _____, additional funds will not be provided and this award will be reduced by _____. All required Progress and Financial reports have been submitted and accepted.

- (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.*

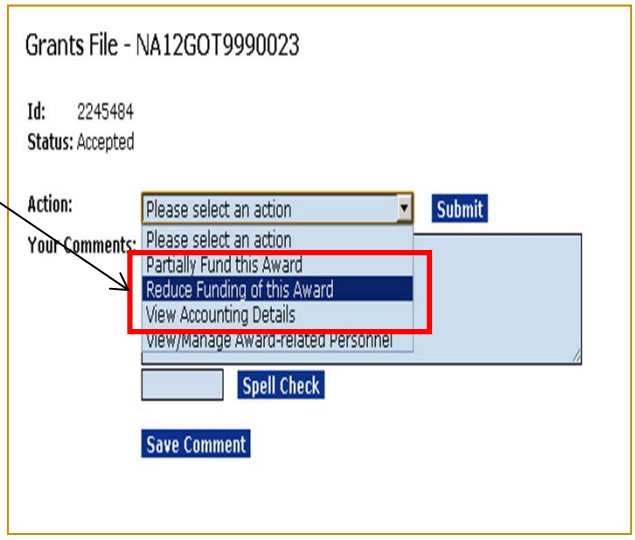
Reduce Funding

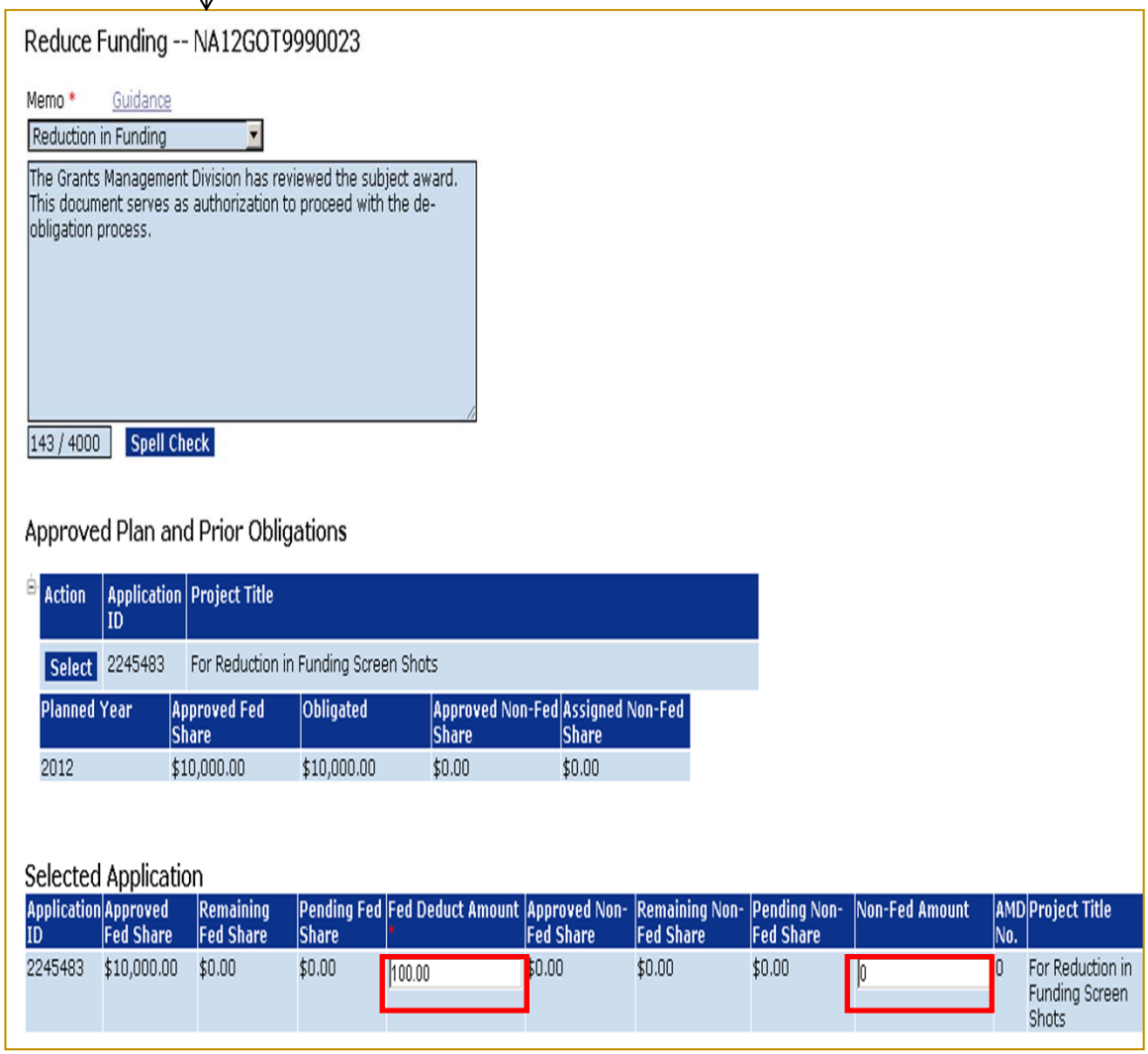


The Reduction in Funding workflow follows a very similar process to the Partial Funding workflow and has the same "Look and Feel."

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.





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.

31 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: * $ -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

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.

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.

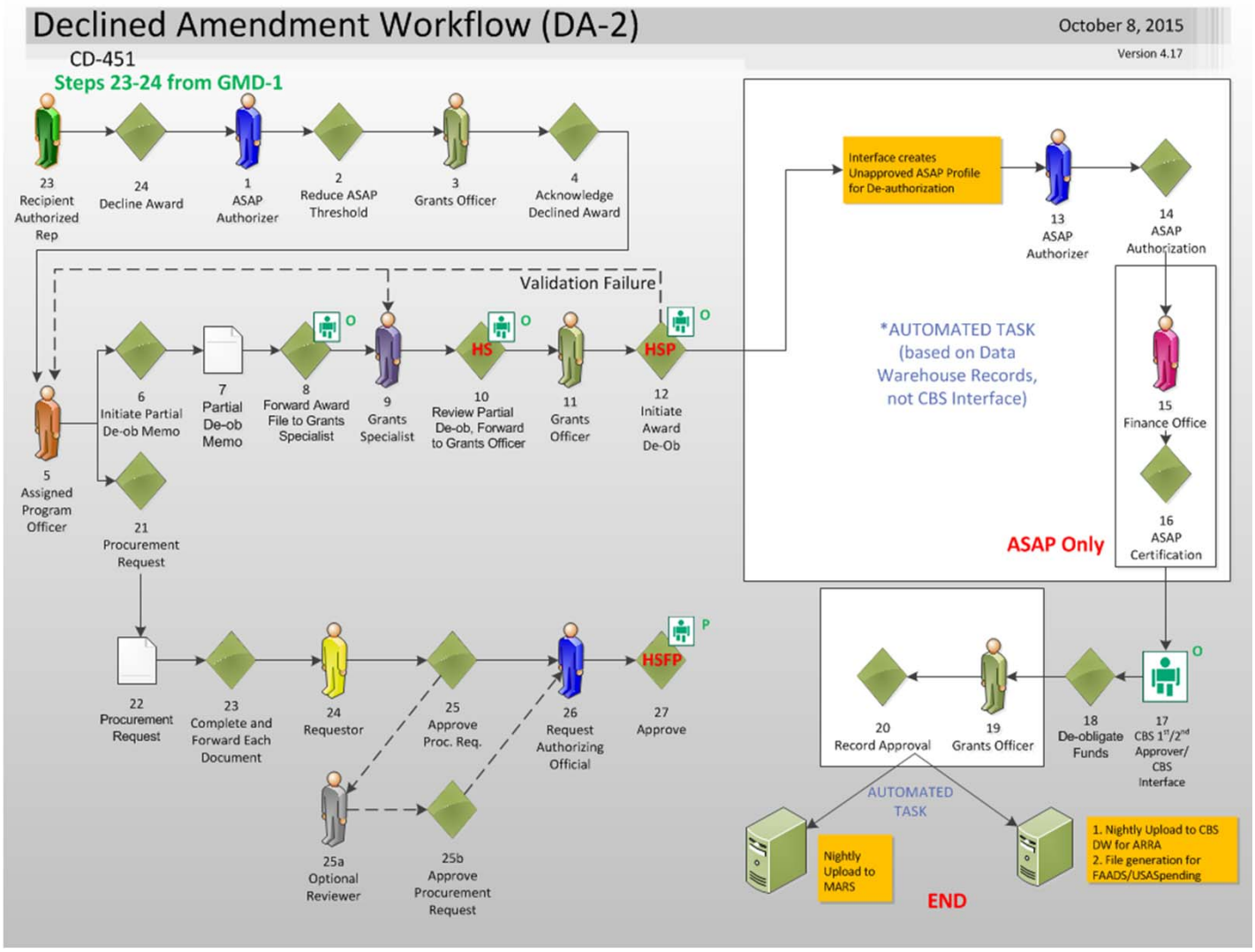
Spell Check

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

Cancel PDF

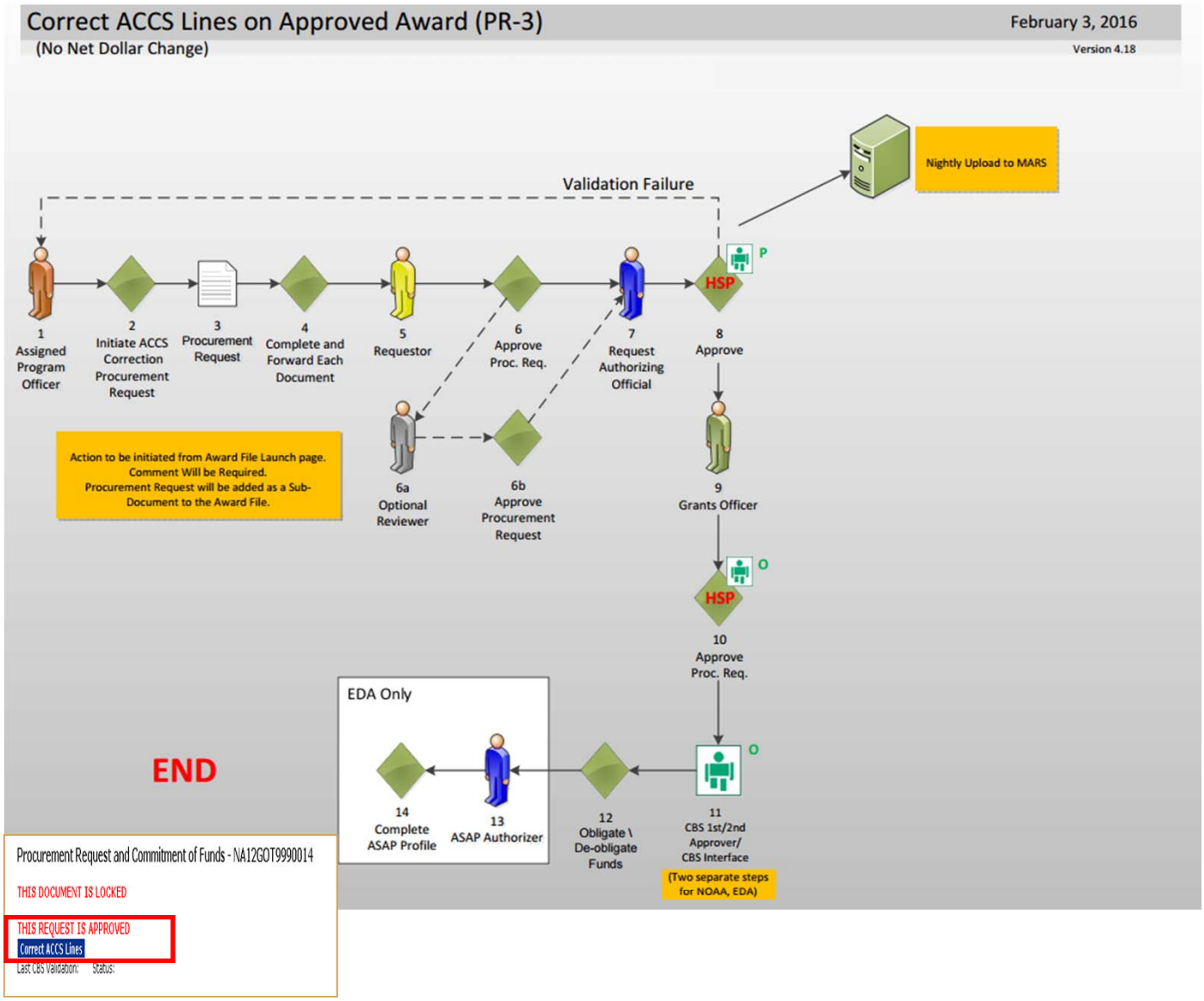
The Award File for a Reduction in Funding contains a de-obligation memo. This is used to document the de-obligation by the system via the interface. In the case of a non-interfaced award the workflow will go through the Finance Office where the de-obligation memo will be manually approved. There is no 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)



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



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

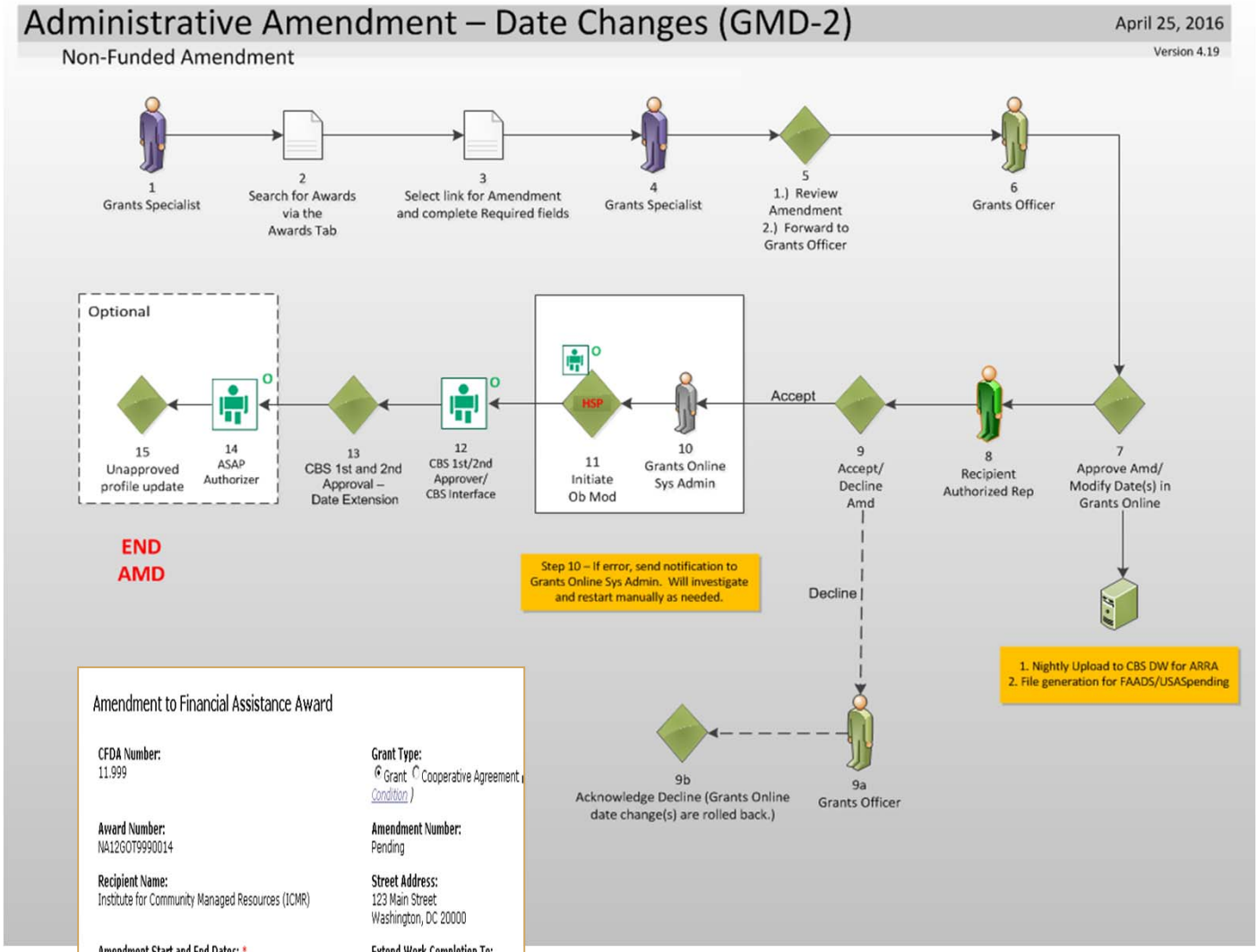
To make a correction to an ACCS line on an already approved award:

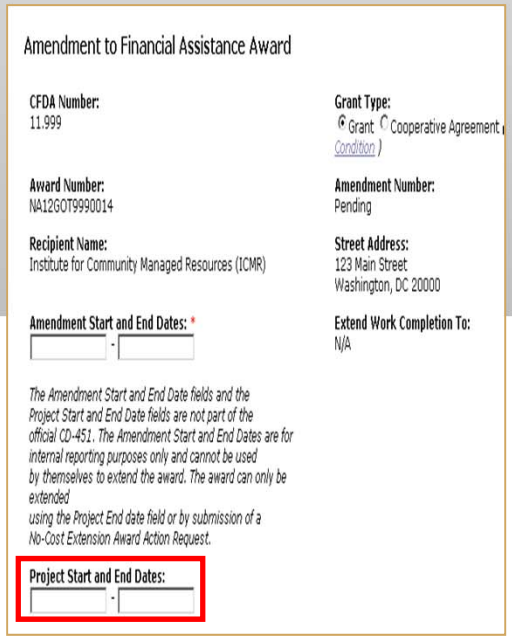
1. Navigate to the Award File containing the Procurement Request that needs to be corrected.
2. Access the details page of the Procurement Request that needs to be corrected.
3. Click the **Correct ACCS** button. This will generate a new “zero-dollar” Procurement Request.
4. Edit the ACCS line to make 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





Amendment to Financial Assistance Award

CFDA Number: 11.999

Grant Type: Grant Cooperative Agreement Condition

Award Number: NA12GOT9990014

Amendment Number: Pending

Recipient Name: Institute for Community Managed Resources (ICMR)

Street Address: 123 Main Street Washington, DC 20000

Amendment Start and End Dates: *

Extend Work Completion To: N/A

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:

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.