



Grants Online Training

New Federal Program Officers

August 2019

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Federal Program Officer Training Agenda

Day 1

Grants Online Overview, RFA Creation, & Award Package Processing
Introduction and Agenda
Grants Online Overview and Log On
Hands-On Participation – Non-Competitive RFA Creation
Hands-On Participation – Competitive RFA/Notice of Funding Opportunity Creation
Demo Only – Application Review and Competitive Selection Package
Hands-On Participation – Award Package Processing
Wrap Up: Additional Resources and Training Questions/Concerns & Answers

* Breaks and Lunch will be scheduled at convenient stopping points

OBJECTIVES – By the end of the day, students should:

- Understand the roles of Grants Online and the Grants Online PMO within the Department of Commerce Grants community
- Understand the underlying structure of the Grants Online system
- Locate basic Grants Online application and award information
- Understand the difference between a Competitive RFA and other types of Universal RFA (previously aggregated using the label “Non-Competitive”)
- Understand the difference between the Certified and Uncertified Federal Program Officer/Program Office Staff roles
- Create and route a Universal RFA
- Create a Competitive RFA and route documents for publication
- Understand the Competition Manager and Selection Official functions in the Competitive RFA workflow
- Input a paper application and complete the “Review Minimum Requirements” task
- Conduct Negotiations and prepare an Award File for Grants Management review
- Understand the Award File approval and acceptance process
- Know where to find help when needed

TRAINING MATERIALS:

1. Agenda and Objectives
2. List of Acronyms
3. Grants Online Overview Presentation
4. Grants Online User Roles (Spreadsheet)
5. Grants Online User Roles – Federal and Grantee (Definitions)
6. Process Maps and Screen Shots



Grants Online Overview

August 2019

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 DOC grants business processes that will contribute to a more efficient and effective 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

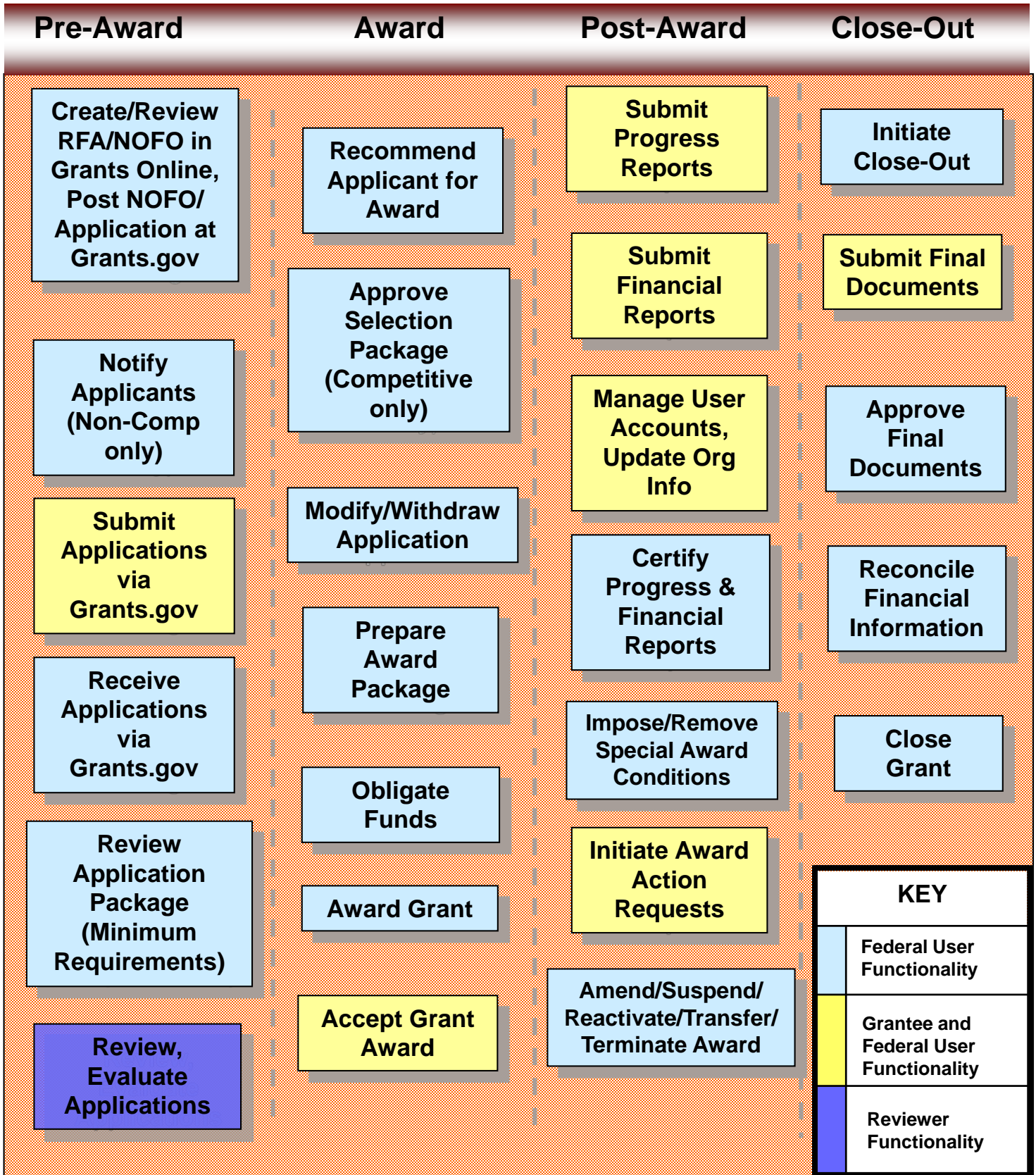
Review Module – October 2011

CBS Interface (NOAA Only) – June 2012

Rollout to EDA – FY 2015

Rollout to Census – FY 2016

Grants Life Cycle



Grants Online System Requirements

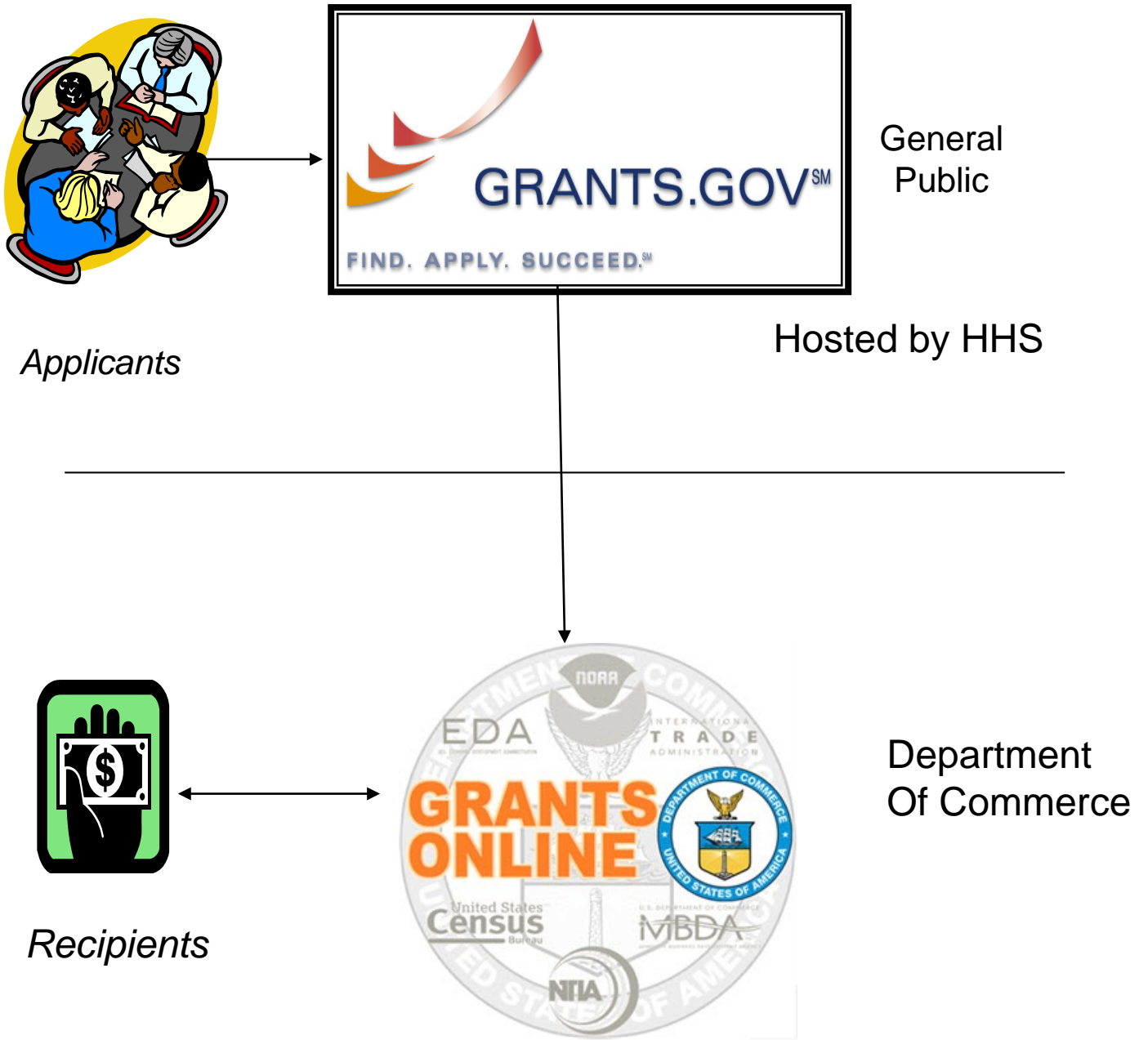
The System

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.

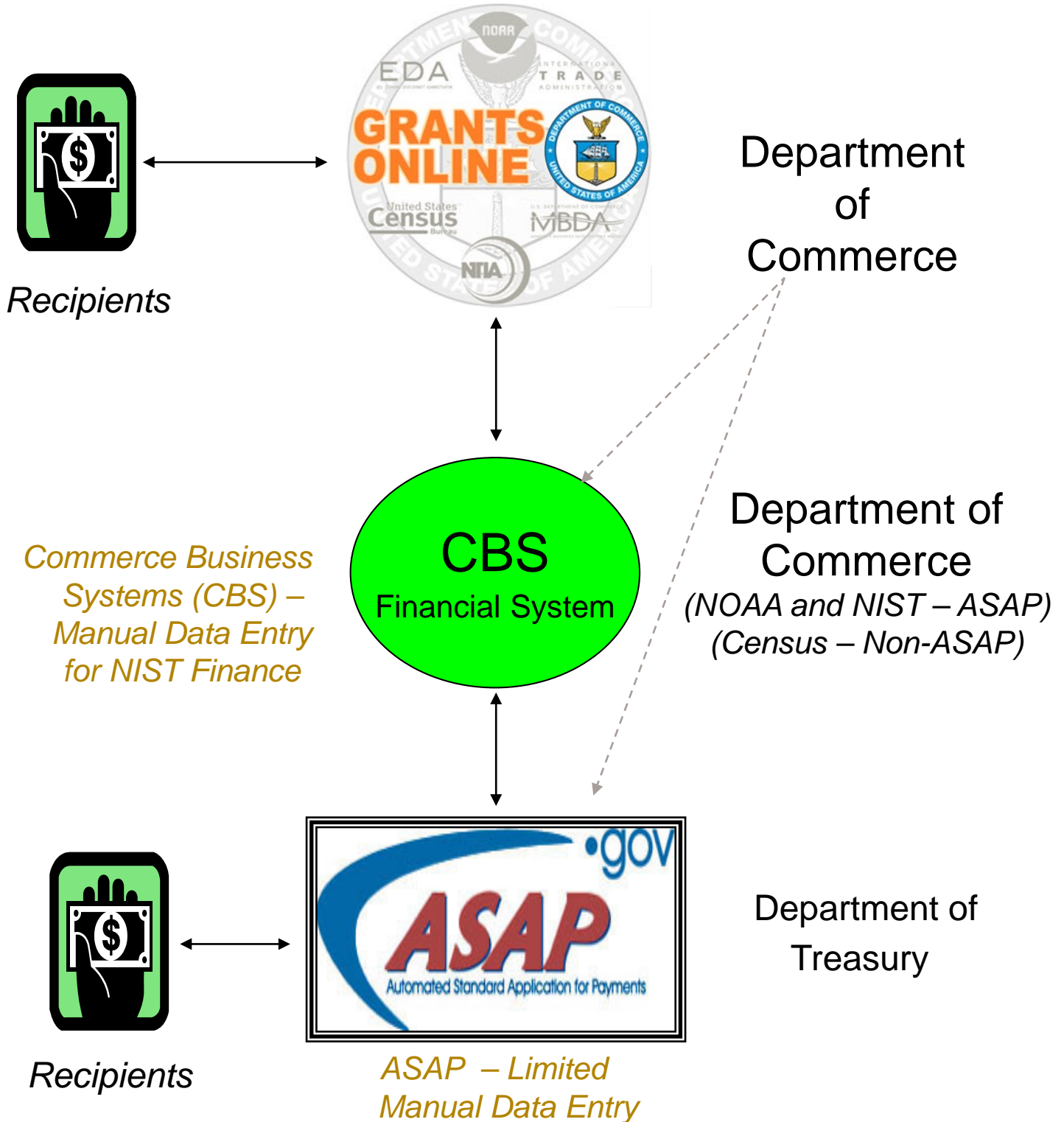
Recommended Internet Browsers:

- **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>
- **Windows or Mac – Firefox 2.0 or higher**
- **Google Chrome**

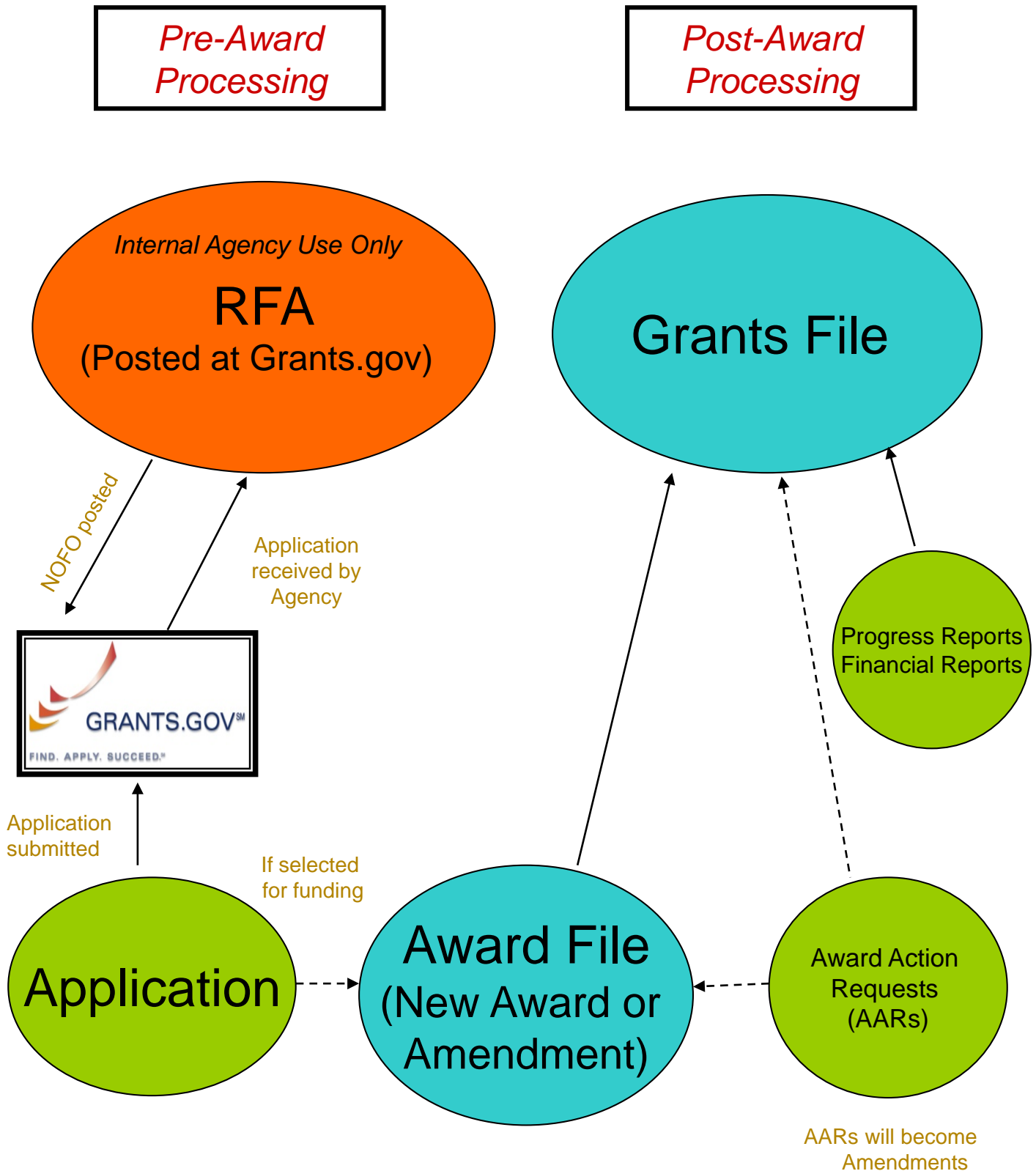
Grants Online and Grants.gov



Grants Online and ASAP

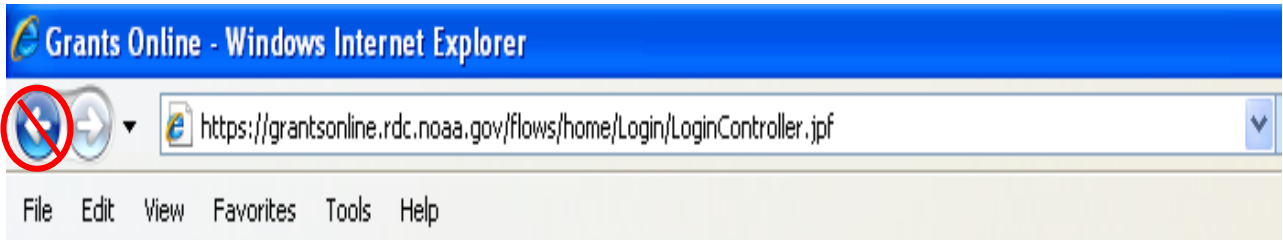


Grants Online Document Relationships



Grants Online Helpful Hints

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



- On the Home Page, click the "Forgot your username?" link or the "Need Help?" button to locate the Help Desk phone number.

DEPARTMENT OF COMMERCE
UNITED STATES OF AMERICA

commerce
trade and
banking

Welcome to
Grants Online

- DoC
- NOAA
- DoC/OS/OHRM
- MBDA
- ITA
- NTIA
- EDA
- CENSUS
- Grants.gov
- Grants Management Division

General Public
Use our Public Search feature to see information pertaining to awarded Department of Commerce grants.
[Public Search](#)

Grant Applicants
To Find and Apply for a Federal grant, go to the [Grants.gov](#) website.

Current Grant Recipients

- View information about your current DoC/OS, NOAA, MBDA, ITA, NTIA, EDA or CENSUS grants
- Submit post-award action requests, progress reports, and financial reports
- Correspond with your Federal Program Officer and Grant Specialist

REVIEWERS

- Access current applications assigned to you
- Submit your review comments and scores
- If you have been assigned a review in Grants Online, you must login through the [Grants Online Application Review](#) page.

Federal Staff

- Generate funding notices
- Review grant applications
- Select applications for award
- Process selected applications
- Award and manage grants
- Correspond with Grant Recipients

Training

- [Grants Online Training](#)

Grants Online is the premier Federal solution for full life-cycle grants management processing.

Username

Password

Enter

[Forgot your username?](#)

[Forgot your password?](#)

[Need Help?](#)

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.***



11 items found, displaying all items. 1

View	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date	Completed Date	Award Number
View	2564265	Notify Recipients	In Progress	RFA	2256808	05/20/2014		N/A
View	2556044	Notify Recipients	In Progress	RFA	2256757	05/01/2014		N/A
View	2556041	Conduct Negotiations	In Progress	Application	2256738	06/12/2014		NA14GOT9990069
View	2554004	Review Award Action Request	Not Started	Award Action Request	2256304			N/A
View	2553976	Review Award Action Request	Not Started	Award Action Request	2256303			N/A
View	2553942	Manage Review Event	In Progress	Review Event	2256285	02/10/2014		N/A

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:

Dark blue buttons with white lettering indicate an action to be taken.

Document Type:
 Status:

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

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 Brandi Franklin	301-683-3512 301-683-0496
NOAA/NMFS	Jeff Kulnis Dan Namur	301-427-8771 301-427-8730
NOAA/NOS	Kadija Baffoe-Harding Craig Reid Laurie Golden	240-533-0955 240-533-0783 240-533-0285
NOAA/NWS	Laura Glockner	301-427-9784
NOAA/OAR	Brenda Alford Patricia Gill-Smith	301-734-1174 301-734-1161
NOAA/OED	Carrie McDougall Sarah Schoedinger	202-482-0875 240-676-3538
MBDA	Joann Hill Nakita Chambers	202-482-4826 202-482-0065
ITA	Brad Hess Annette Henderson	202-482-2969 202-482-3995
NTIA/BTOP	Stacy Delgado Laura Pettus	202-482-7936 202-482-4509
Census	Towana Nix Theresa Taylor	301-763-9399 301-763-2921
EDA*	Bernadette Grafton Ryan Smith	202-482-2917 202-482-1464

* Regional & Area Directors are also authorized to request user account updates for their region.

NOTE: Contact Name & Phone Number based upon Dept. of Commerce or NOAA Personnel Directories -- Accessed: July 22, 2019

Who to Contact for Assistance

Role	Responsibilities
<p>Recipient Administrator</p>	<p>All the actions related to managing their organization's user accounts:</p> <ul style="list-style-type: none"> ➤ Create an account for a new user ➤ Reset user passwords ➤ Unlock user accounts ➤ Update the roles and access for users ➤ Disassociate users <p>For step-by-step instructions associated with tasks performed by the Recipient Administrator, please reference the Task Reference Guide.</p> <p>The Grants Online Help Desk is available for additional assistance to the Recipient Administrator as needed.</p>
<p>Federal Staff</p>	<p>Provide guidance with non-technical questions, including helping users with the following:</p> <ul style="list-style-type: none"> ➤ Programmatic and grants management ➤ Policy questions – terms and conditions on their awards ➤ Content of financial and progress reports ➤ Explaining the different award action requests and the content if submitted through Grants Online ➤ Close out process
<p>Grants Online Program Management Office (Help Desk)</p>	<p>Technical support associated with completing the following actions:</p> <ul style="list-style-type: none"> ➤ View a task ➤ View an award file ➤ View workflow history ➤ Accept a new award ➤ Reassign tasks ➤ Access and submit progress and financial reports ➤ Inquiries related to reports that are not generated in the system

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 **240-533-9533**
 - Hours: **8:00 AM – 6:00 PM** Eastern Time
- Ready to start working in Grants Online?
 - Go to <https://grantsonline.rdc.noaa.gov>



Grants Online Training Acronyms & Roles

August 2019

DOC Grants and Grants Online Acronyms

AAR	Award Action Request
ACCS	Accounting Classification Code Structure
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)
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)
CESU	Cooperative Ecosystem Studies Units
CFDA	Catalog of Federal Domestic Assistance
CFR	Code of Federal Regulations
CI	Cooperative Institute
Co-PI	(Recipient) Principal Investigator - Secondary
DNP	Do Not Pay
DOC	Department of Commerce
DOC-OS	Office of the Secretary, DOC
DUNS	Dun & Bradstreet Number
EDA	Economic Development Administration
EIN	Employer Identification Number
ERA	Electronic Recipient Acceptance
FAADS	Federal Assistance Award Data System
FAC	Federal Audit Clearinghouse
FAIS	Federal Assistance Information Sheet
FALD	Federal Assistance Law Division of DOC
FAPIIS	Federal Awardee Performance and Integrity Information System
FCS	U.S. and Foreign Commercial Service, ITA
FFO	Federal Funding Opportunity (Now known as NOFO)
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)

DOC Grants and Grants Online Acronyms

NFA or OFA	NOAA Finance and Administration
NMFS	National Marine Fisheries Service (NOAA Fisheries Service)
NOAA	National Oceanic and Atmospheric Administration
NOFA	Notice of Funds Availability (See FFO, FRN, NOFO, RFA)
NOFO	Notice of Funding Opportunity (Previously FFO)
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)
OGC	Office of General Counsel, DOC
OHRM	Office of Human Resource Management, DOC-OS
OIE	Office of Innovation and Entrepreneurship (EDA Program Office)
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)
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	Specific / Special Award Conditions
SAM	System for Award Management
SEC/USEC	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)

For the Grants Online Glossary, please reference:

http://www.corporateservices.noaa.gov/grantsonline/Documents/GrantsOnline_Glossary.pdf

Grants Online Roles - Federal or Recipient (Grantee)

FUNCTIONS / ROLES	Cert FPO	UnCert FPO	Pgm Office Staff	Budget Officer (Authorized Official)	Pgm Office Reviewer	Pgm Office Requestor	NEPA Official	Selecting Official	GMAC	Grants Specialist	Grants Officer	Recipient Authorized Rep.	Recipient Admin.	Recipient P/ID	Recipient Biz/Fin Rep.
View Awards	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Create RFA (Including NOFO and Synopsis)	X	X	X												
Review NOFO 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	X				
Review Procurement Request	X	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		X	X		
Initiate Amendment										X					
Complete Administrative Review of Award File										X					
Approve Award															
Accept or Reject Award											X				
Manage Recipient Users												X			
Complete Progress Report	X	X	X									X	X		
Submit Progress Report	X	X	X									X	X*		
Complete Financial Report												X	X		X
Submit Financial Report												X			X*
Accept Progress Report	X														
Accept Financial Report											X				
Authorize Bureau User Access to Grants Online									X		X				

* Recipient Administrator needs to confer the "submitting" role

Explanation of User Roles

User Role	Definition
Authorized Account Approver (AAA)	This role is assigned to users (Federal - internal and Recipient Administrators - external) who have been authorized to update the Grants Online user accounts. Effective FY 2019, this role was added to the account of all users who operate in this capacity.
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 (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 oversight for CESU (Cooperative Ecosystem Studies Units) Awards.
Closeout Notification Receiver	This role is given to Grants Management personnel who receive notification that the Final Progress Report and Final Financial Reports for the awards managed by each bureau have been accepted. The notification indicates that the award is ready for closeout activities to proceed.
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.
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.

Explanation of User Roles

User Role	Definition
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.
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	The NEPA Official reviews and approves the NEPA documentation, a part of the 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.
OIG -- Clearance	If a Grants Specialist selects forward to OIG, the person with this role in the Office of the Inspector General would receive a task to provide legal review.
OIG -- Oversight	The individual assigned to this role can view information associated with the legal aspects of an award. He/she does not have any tasks associated with legal review.

Explanation of User Roles

User Role	Definition
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.
Primary Office Contact	This role is assigned to those who can make updates to the Supplementary Information category for each Line Office or Program Office. If no one from either the Line Office or Program Office is assigned to this role, the Help Desk staff can update the Supplementary Information category.
Program Office Reviewer	This role is 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.
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 be done by 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	A user with this role can set up other people in their organization as users of the Grants Online system and can grant the users access to specific awards as is appropriate.

Explanation of User Roles

User Role	Definition
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 is given to recipient users who need to complete Financial Reports (SF-425 and SF-270). A user with this role cannot forward the Financial Reports to the Federal Agency. He/she can only forward the Financial Reports to his/her Authorized Representative; the Authorized Representative can submit Financial Reports to the Federal Agency.
Recipient Business/Finance Representative -- Submitting	This role is given to recipient users who need to complete Financial Reports (SF-425 and SF-270). A user with this role can submit Financial Reports directly to the Federal Agency.
Recipient Investigator (Principal Investigator/Project Director)	This role is given to recipient users who need to fill out Performance Progress Reports (PPRs) or Research Performance Progress Reports (R-PPRs). A user with this role can only forward the PPRs or R-PPRs to their Authorized Representative who can in turn submit the PPRs or the R-PPRs to the Department of Commerce. A user with this role can initiate an Award Action Request (AAR). However, all AARs must first be forwarded to an Authorized Representative for submission to the Department of Commerce.
Recipient Investigator -- Submitting	This role is given to recipient users who need to fill out Performance Progress Reports (PPRs) or Research Performance Progress Reports (R-PPRs). A user with this role can submit PPRs or R-PPRs directly to the Federal Agency. A user with this role can initiate an Award Action Request (AAR). However, all AARs must first be forwarded to an Authorized Representative for submission to the Department of Commerce.
Recipient User (Recipient Key Personnel)	A person with this role can view assigned awards for their organization and initiate Award Action Requests. However, a person with this role must submit documents to his/her organization's Authorized Representative. The Authorized Representative will review and submit documents to the agency.
Requestor (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.
Reviewer	This role is given to a person who reviews applications during the Review Event Process. This person is typically a Subject Matter Expert or has some level of expertise in a discipline associated with the award.
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 web services 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.

Explanation of User Roles

User Role	Definition
Vendor Validator	This role is given to Tier3 Help Desk personnel in the Grants Online Program Management Office who perform data quality assurance tasks on Grants Online organization records before they are passed to the Vendor Control users in the Finance Office.
View Agency	This role is available for Federal staff (at the Agency/Bureau level) who need view-only access to grants files.
View Line Office	This role is available for Federal staff (at the Line Office Level) who need view-only access to grants files.
View Program Office	This role is available for Federal staff (at the Program Office Level) who need view-only access to grants files.

Certified Program Officer
or
Uncertified Program Officer
Uncertified Federal Program Officers and Program Office Staff have identical Grants Online roles.
<p>They can:</p> <ul style="list-style-type: none"> -- Be assigned as the Program Officer on an RFA or application. -- Complete the PO Checklist. -- Complete the NEPA document and forward it to the NEPA Official. -- Complete Negotiations. -- Complete the Procurement Request and Commitment of Funds (PRCF) and send it to the Requestor. -- Initiate a Partial Funding. -- Accept the Minimum Requirements Checklist (NOTE: only the Certified Federal Program Officer can reject an Application). -- Create a Progress Report (but cannot accept Progress Reports). -- Be assigned as Requestors. -- Manage a Competition.
<p>They cannot:</p> <ul style="list-style-type: none"> -- Certify the PO Checklist (NOTE: only the Certified Federal Program Officer can certify the PO Checklist). -- Forward an Award File to the Grants Specialist. -- Create Award Action Requests (AARs). (Certified FPOs also cannot create Award Action Requests) -- Create Amendments. (Certified FPOs also cannot create Award Action Requests) -- Forward a RFA, the Reviewer Instructions, or the Notice of Funding Opportunity (NOFO); those tasks must be performed by the Certified Federal Program Officer. -- Forward Reviewer Instructions, AARs, the Award File or an Amendment to FALD for review.
<p>NOTE:</p> <p>An underlying rule is that the Uncertified Program Officer and Program Office Staff users cannot use the Grants Online system to communicate with Grants Management, FALD, Applicants or Recipients.</p>



Grants Online Training

Universal RFA Creation & Application Processing

August 2019

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:

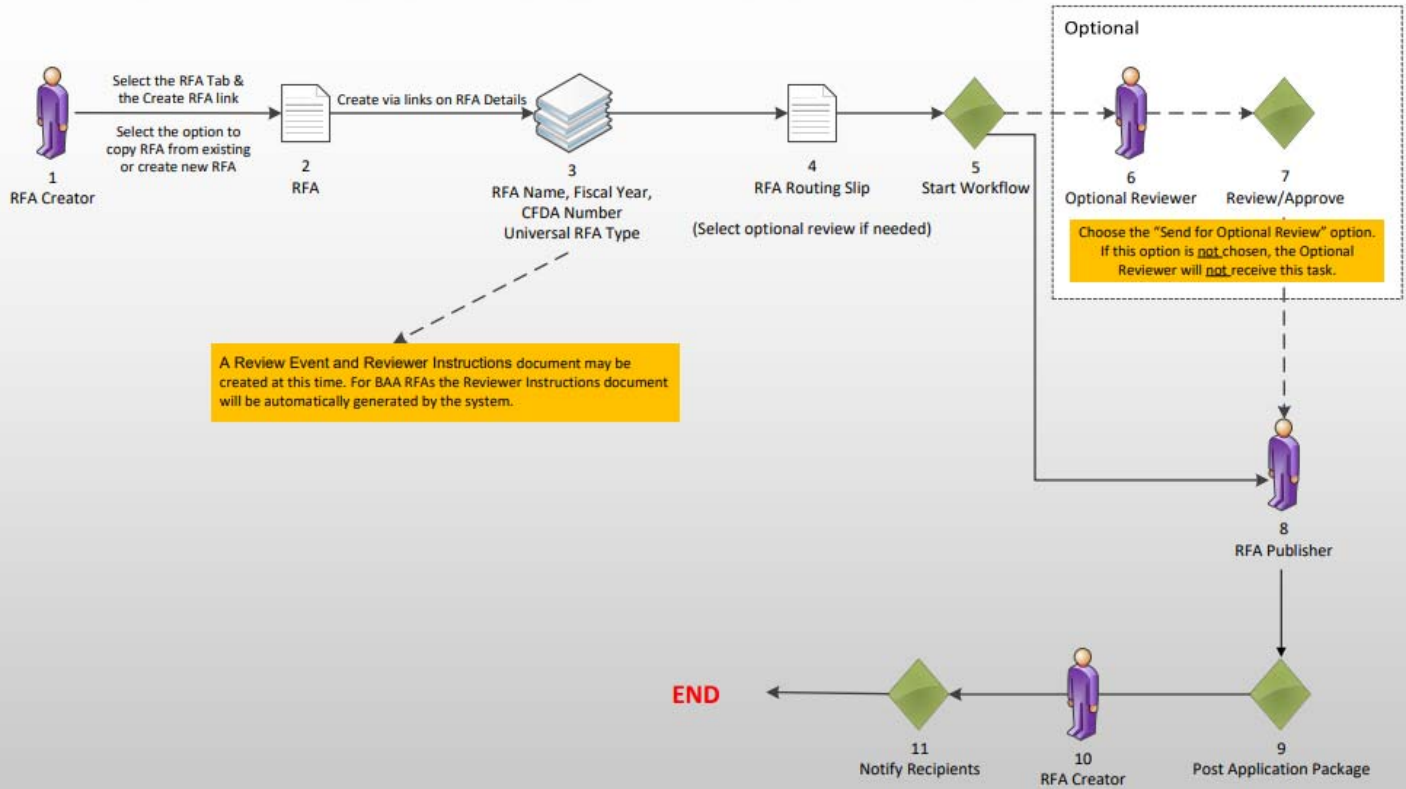
1. The Assigned Program Officer for the RFA must be a “Certified FPO” to advance documents to the next step in the workflow process.
2. For both Universal and Competitive RFAs the user should know the person(s) in his/her Program Office who will receive the application(s) for the initial Minimum Requirements Check.

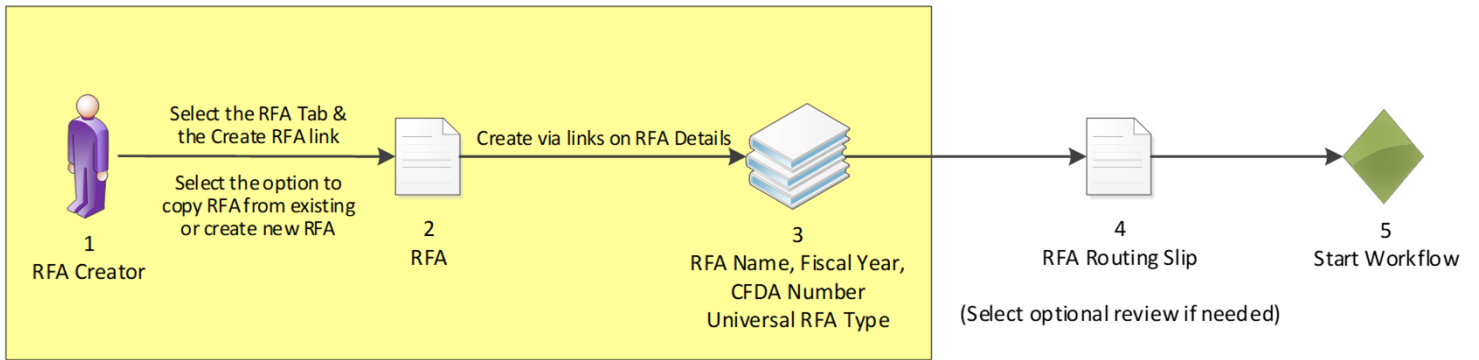
Universal Process – RFA Creation

Create RFA, Post Application Package Overview (UNI-1)

April 29, 2019

Version 4.27





RFA Details

RFA Header Information

Document ID: 2595041
 RFA Name:
 Fiscal Year: (YYYY)
 Announcement Type: I
 Funding Opportunity Number: NOAA-GOT-OCPO-NOAA-2016-2004904
 Line Office: Grants Online Training (GOT-NOAA)
 Assigned Program Office:
 Assigned Program Officer:
 CFDA Number:
 SubProgram:
 RFA Type:

RFA Additional Information

Anticipated Funding Amount for All Recipients: \$
 Application Due Date: Time: (HH:MM) PM East
 Anticipated Award Date:

Selected Federal Addresses *
 No addresses have been selected.
[View/Edit](#)

Selected Federal Contacts *
 No contacts have been selected.
[View/Edit](#)

Recipient Information/Application Details * No recipients have been selected.
[Add New](#)

Search Addresses

Program Office Name:
 Street Address:
 City:
 State:
 Zip:

Search Results

One item found.1

Program Office Name	Address
<input type="checkbox"/>	One Commerce Program Office (OCPO) 123 Grants Online Way, Money, MD 20000 USA

Search Results

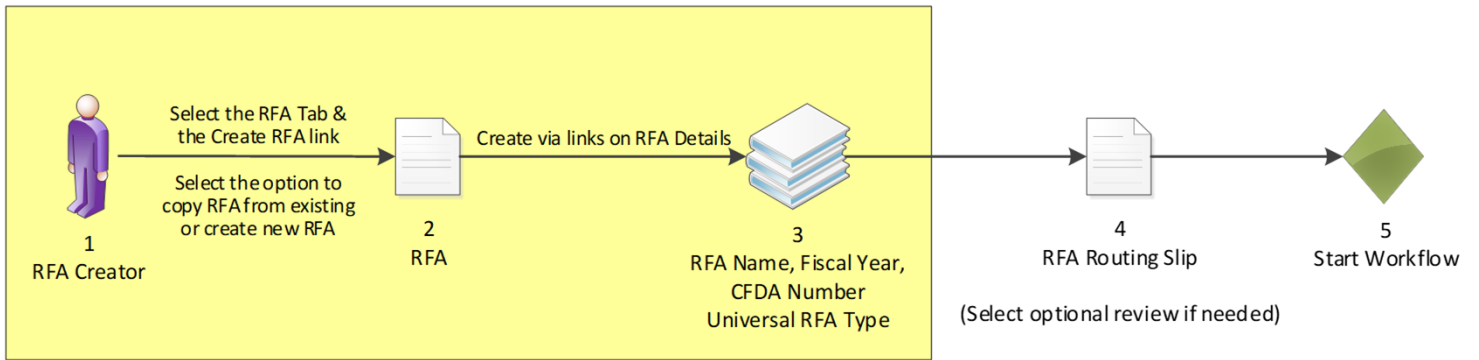
One item found.1

Program Office Name	Address
<input checked="" type="checkbox"/>	One Commerce Program Office (OCPO) 123 Grants Online Way, Money, MD 20000 USA

Selected Addresses for this RFA

One item found.1

Program Office Name	Address
<input checked="" type="checkbox"/>	One Commerce Program Office (OCPO) 123 Grants Online Way, Money, MD 20000 USA



RFA Details

RFA Header Information

Document ID: 2595041
 RFA Name: Universal RFA
 Fiscal Year: 2016 (YYYY)
 Announcement Type: I
 Funding Opportunity Number: NOAA-GOT-OCPO-NOAA-2016-2004904
 Line Office: Grants Online Training (GOT-NOAA)
 Assigned Program Office: One Commerce Program Office (OCPO-NOAA)
 Assigned Program Officer: Student00, Grant
 CFDA Number: 11.998 - Grants Online TRAINING
 SubProgram: -Select a Sub Program-
 RFA Type: Noncompetitive

RFA Additional Information

Anticipated Funding Amount for All Recipients: \$
 Application Due Date: (MM/DD/YYYY) Time: (HH:MM) PM
 Anticipated Award Date: (MM/DD/YYYY)

Selected Federal Addresses: No addresses have been selected. [View/Edit](#)

Selected Federal Contacts: No contacts have been selected. [View/Edit](#)

Recipient Information/Application Details: No recipients have been selected. [Add New](#)

Step 1

Recipient Information
 Recipient *
 Search

Step 2

Select Organization
 Enter your search criteria to find the organization.
 Organization Name
 Address-City
 DUNS Number: 167479591
 EIN Number
 Address-State: Please select a state
 Search Cancel

Step 3

Select Organization
 Enter your search criteria to find the organization.
 Organization Name
 Address-City
 DUNS Number: 167479591
 EIN Number
 Address-State: Please select a state
 Search Cancel

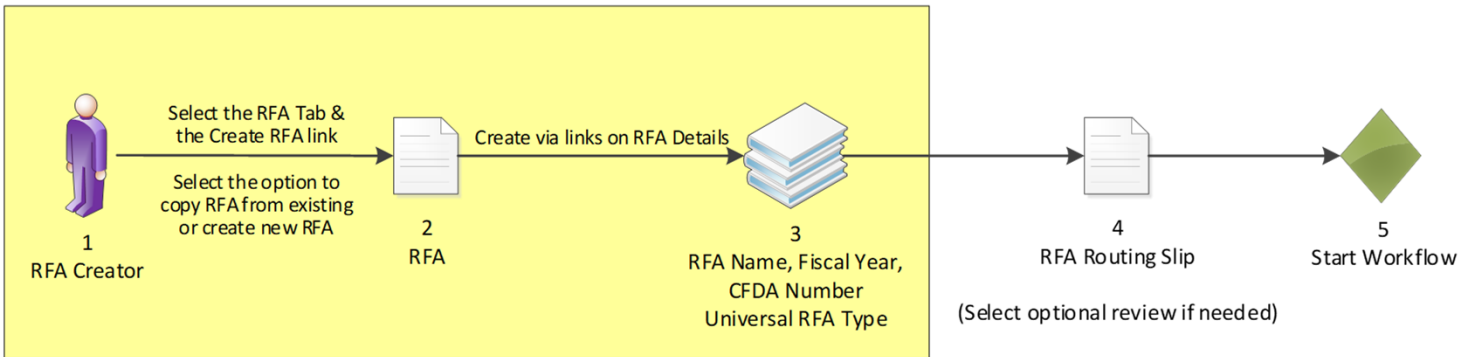
Step 4

Add a new organization >>

One item found: 1

Select	Org ID	Name	Bureau	Address	DUNS	DUNS+	EIN	Cage Code	ASAP Id	Active
Select	2005855	MILAN CHAMBER OF COMMERCE INC	NOAA	1069 S MAIN ST, MILAN, TN 38358-2748 USA	167479591		620419625	6WK72		true

When adding a Recipient to the RFA use the DUNS Number to perform the lookup.



Mission Goals Information * No mission goals have been selected.
[View/Edit](#)

Application Routing *
No Program Officers are assigned to receive applications
 Workload State [View/Edit](#)

Application Package *
An application package has not been selected.
[View/Edit](#)

Minimum Requirements *

Priority	Requirement Name
1	Received on Time
2	Correct Federal Funding
3	Correct Match
4	Complete Application
5	Data Management Plan

[View/Edit](#)

Special Award Conditions
No Special Award Conditions are associated with this RFA.
[View/Edit](#)

Matching Requirements
No Matching Requirements have been defined.
[View/Edit](#)

Review Events No review events have been defined.
[Add New >>](#)

Attachments:
No attachments.

Add new Attachment: [\[+\]](#)
Any changes to information on this page should be saved before clicking [Large File Guidance](#)

Save **RFA Routing Slip – Start Workflow** **Cancel**

Application Package

Select a Form Family : *

Select a Template : *

Mandatory Forms

- Budget Narrative Attachment Form
- CD-511
- Project Narrative Attachment Form
- SF-424
- SF-424A
- SF-424B

Optional Forms

- Other Attachments Form
- SF-LLL

Attachments:

For Universal RFAs, you may attach Application Instructions to the RFA. Use Application Instructions as the short description. Only one file may be attached at Grants.gov as Application Instructions. The preferred file format is pdf.

Save **Cancel/Done**

Special Award Condition Details

Name : *

Description : *

Spell Check

Save **Done** **Cancel**

Matching Requirement

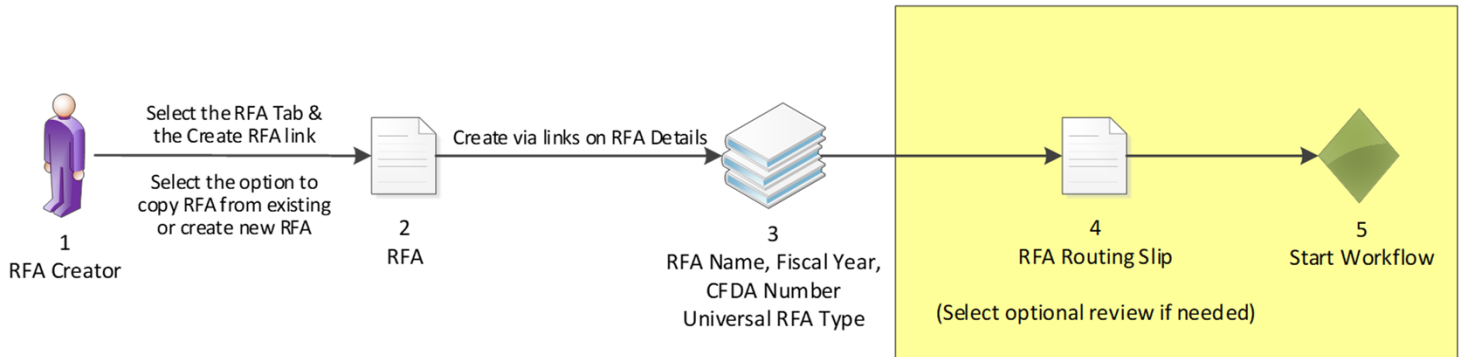
Statutory Authority : *

Minimum Cost Share (%): *

Maximum Cost Share (%): *

Save **Cancel**

Most NOAA Program Offices use the Standard Non-Construction application package. 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.



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.

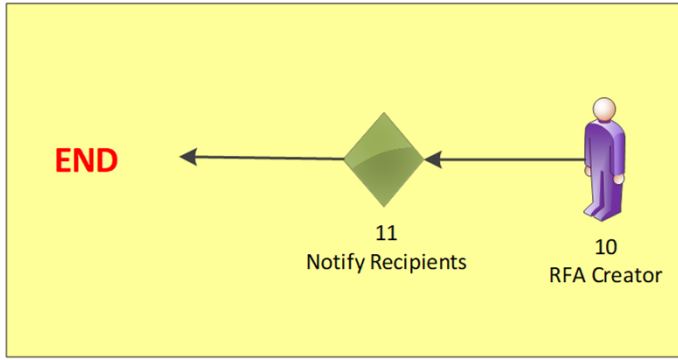
Add Optional Reviewer

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: Status: [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: [Submit](#)

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](#)

Sample Grant Applicant Email

From: GrantsOnline.test@noaa.gov (GrantsOnline.test@noaa.gov)
To: Grant.Applicant@gmail.com
Date: Wednesday, April 17, 2019 8:54:40 AM
Subject: Notice of NOAA posting of Application Package at Grants.gov

This is an automated notification from Grants Online that an application package has been posted at Grants.gov and you have been selected by the posting Program Officer for notification.

Grants.gov is available at the URL: <http://www.grants.gov>. If you are not registered at Grants.gov, please begin the registration process immediately. It can take up to 2 weeks to fulfill all of the registration requirements.

To retrieve your application package from the Grants.gov home page:

1. Go to the Applicant tab and click **Apply Now**.
2. On the next page enter the Funding Opportunity Number in the search box:
 - NOAA-ONPO-2019-789654
3. Enter the application filing name.
4. Click on **Create Workspace**.
5. Use the **Download** or **Webform** option for the application (Webform is recommended).
6. Fill out the application and follow the Grants.gov instructions for submission.

Information on the NOAA Request for Applications (RFA):

RFA Name: RFA_Name_Sample01
Fiscal Year: 2019
CFDA Number: 11.998
Opportunity Number: NOAA-ONPO-2019-7896543
Agency: National Oceanic and Atmospheric Administration
Opening Date: 2019-02-11 09:00:00.00
Program Office: One NOAA Program Office
Program Officer: Program Officer
Closing Date: 2019-06-11 23:59:00.00

NOTE: This is the latest due date for all applications in this RFA. Please contact the NOAA Program Officer for verification of when your specific application must be submitted for timely award processing.

For further information contact:

Name: Federal Program Officer
Phone: 301.555.1212
Address: 14th Street & Constitution Avenue, NW
Washington, DC 20230
Email: Federal.ProgramOfficer@noaa.gov

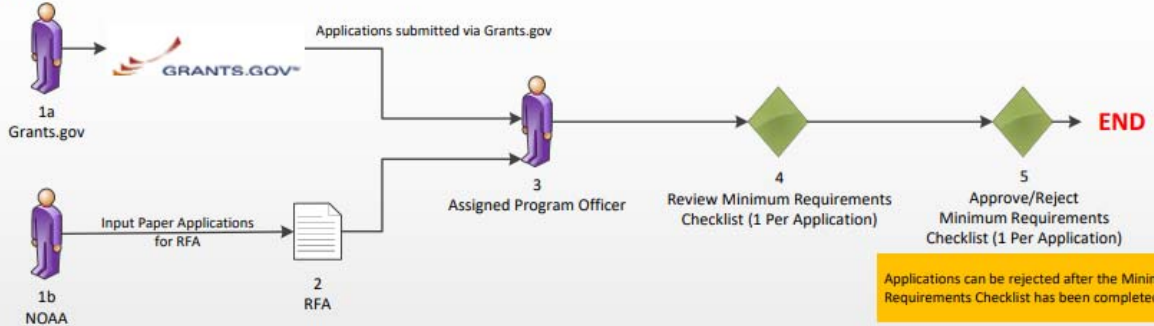
Universal Process – Applications and Review Event

Applications and Review Event Overview (UNI-2)

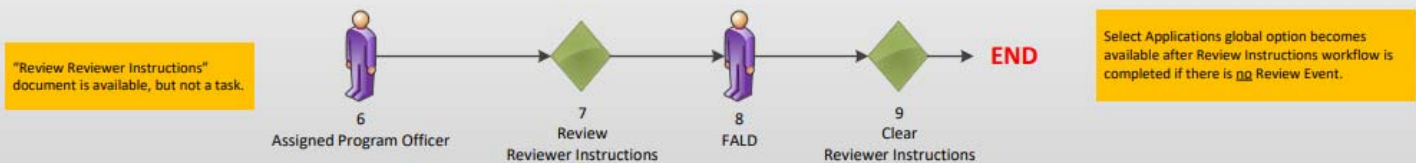
April 29, 2019

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Receive applications



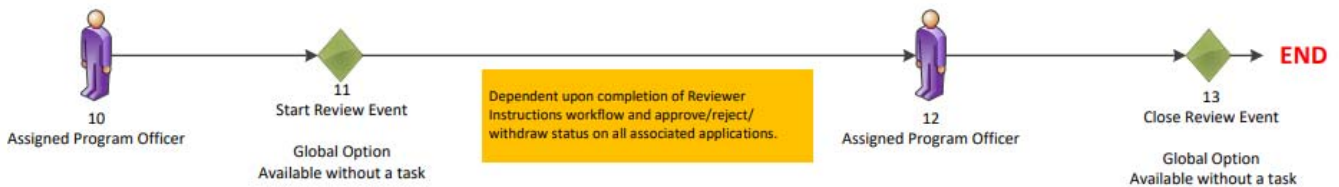
Review Reviewer Instructions



Review Event Workflow

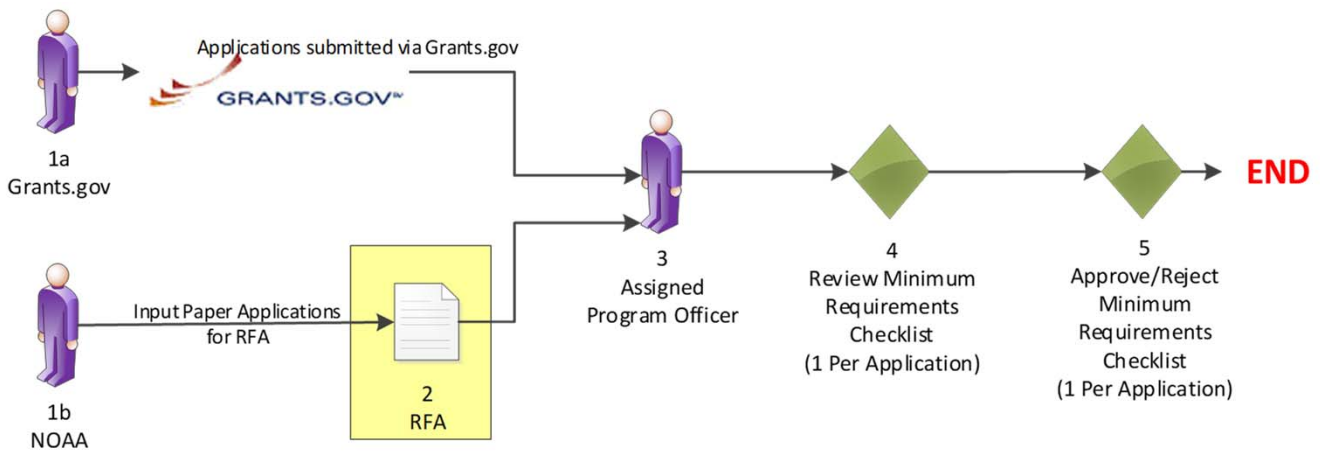
Only if Review Event Exists

- Review Events are optional in Grants Online.
- Review can be conducted using Grants Online functionality or outside of Grants Online



A Review Event is optional for the Universal process.

For further details of the Review Event and Reviewer processes, please reference **Pages 73 & 74** of this Training Manual.



Application Details - SF-424

Audit Trail:

Attachments:

[-] Program Office Added Information

Proposal Number:

Project Type: Construction Non-Construction Both

Principal Investigators- Project Directors:

Keyword(s):

Program Element / Funding Priority:

Principal Place Of Performance: [Search FIPS Data](#) [Guidance](#)

Note: This regular SF-424 requires additional information for Investigators and Directors

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):

Other (specify)

Is this application being submitted to other agencies? What other agencies?

Use format MM/DD/YYYY for date fields.

Project Start Date: * Project End Date: * Sub:

State Received Date: Federal Agency Received Date: * Time:

Applicant Identifier: State Application Identifier: Feder:

Applicant Information

Legal Name: *

Department Name:

Division Name:

Duns Number: (9 or 13 digit number) EIN Number: (xx-xxxxxxx)

Street:

City: County:

State: * Province:

Country: Zip:

Person to be Contacted on Matters Involving this Application

Prefix: First Name: Middle Name: Last Name: Suffix:

Title:

Organization Affiliation:

Phone Number: Fax Number:

Email:

Street:

City: County:

State: Province:

Country: Zip:

Other Application Information

Type of Applicant: *

Other (specify):

Small Business Organization Type: Women Owned Socially and Economically Disadvantaged

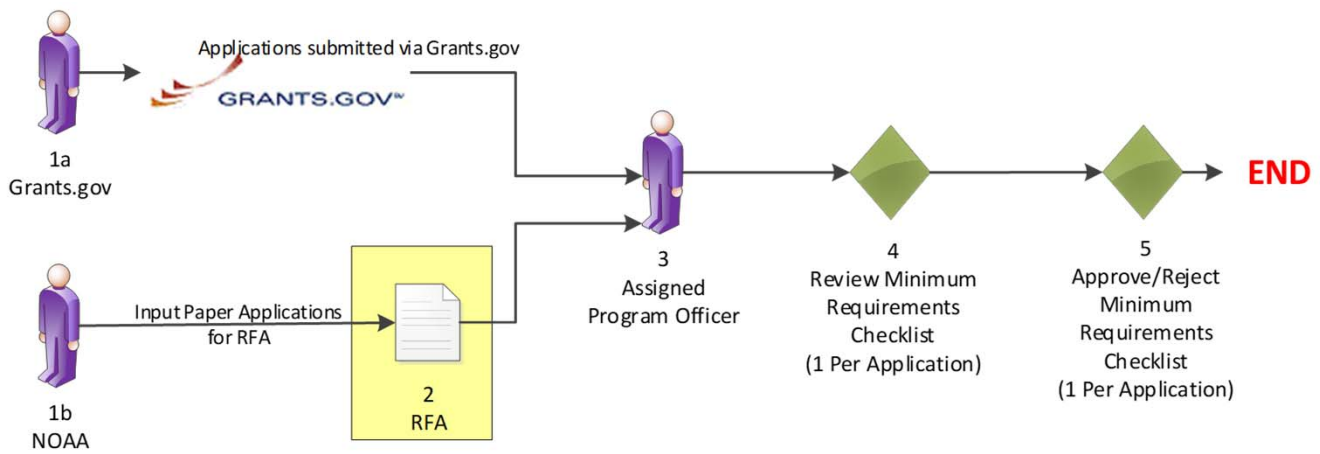
Descriptive Title of Applicant's Project: *

Project Areas:

CFDA Number: *

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.



Name of Federal Agency:

Applicant Congressional District: Project Congressional District:

Is the Applicant Delinquent on any Federal Debt? Yes No

Is Application Subject to Review by State Executive Order 12372 Process?

a. This application was made available to the State under the Executive Order 12327 Process for review on

b. Program is subject to E.O. 12372 but has not been selected by the state for review.

c. Program is not covered by E.O. 12372.

Project Director/Principal Investigator Contact Information

Prefix: First Name: Middle Name: Last Name: Suffix:

Title:

Organization:

Department:

Division:

Phone Number: Fax Number:

Email:

Street:

City: County:

State: Province:

Country: Zip:

Authorized Representative

Prefix: First Name: Middle Name: Last Name:

Title:

Phone Number: Fax Number:

Email:

Street:

City: County:

State: Province:

Country: Zip:

Application Funding Details: *

Total Funding: *

Multi Year Award:

Nothing found to display.

[Add New](#)

Add Application Funding Details

Application Total Funding : 500000

Fiscal Year : *
(use format YYYY)

Funding Start Date : *
(use format MM/DD/YYYY)

Funding End Date : *
(use format MM/DD/YYYY)

Federal Funding : * Program Income :

Applicant Funding :

State Funding :

Local Funding :

Other Funding :

Total Funding :

Application Funding Details: *

Total Funding: *

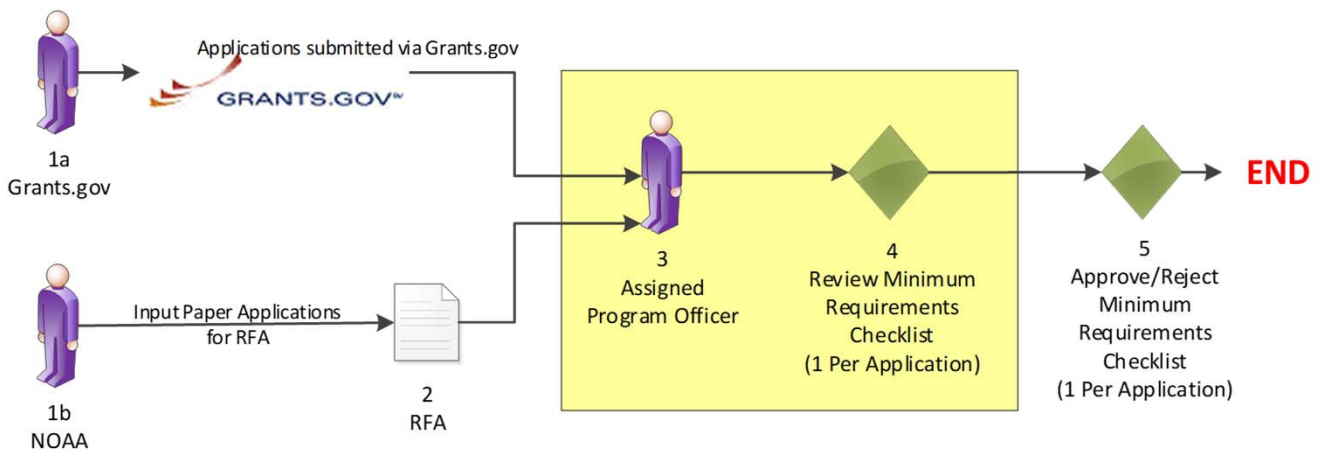
Multi Year Award:

Fiscal Year	Start Date	End Date	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2016	10/01/2015	09/30/2019	\$500,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500,000.00	\$0.00	Edit	Delete

[Add New](#)

The Total Funding amount includes both Federal and matching funds.

Please note that a multiple year award refers to an award that spans across more than one year. A multi-year award would have more than one line of funding; whereas a multiple year award would only have one line of funding.



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

If you choose 'No' for a Minimum Requirement, please provide a comment in the corresponding box to the right or provide general comments in the 'Overall Comments' section below.

Minimum Requirement	Met Requirement ?	Comment
Eligible Applicant: Is the applicant eligible to apply for this RFA based on the applicant type?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/> Spell Check
Application Received by Deadline: Was the application submitted by the deadline date and time?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/> Spell Check
Application Meets Minimum Federal Funding: Does the application request at least the minimum Federal funding required by the RFA?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/> Spell Check
Application Meets Maximum Federal Funding: Does the application request no more than the maximum Federal funding required by the RFA?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/> Spell Check
Application Meets Minimum Match: Does the non-Federal funding provide at least the minimum match percentage of the total funding?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/> Spell Check
Application Meets Maximum Match: Does the non-Federal funding provide at no more than the maximum match percentage of the total funding?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/> Spell Check
Complete Application: Does the application contain all of the required forms?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/> Spell Check

Overall Comments:

[Spell Check](#)

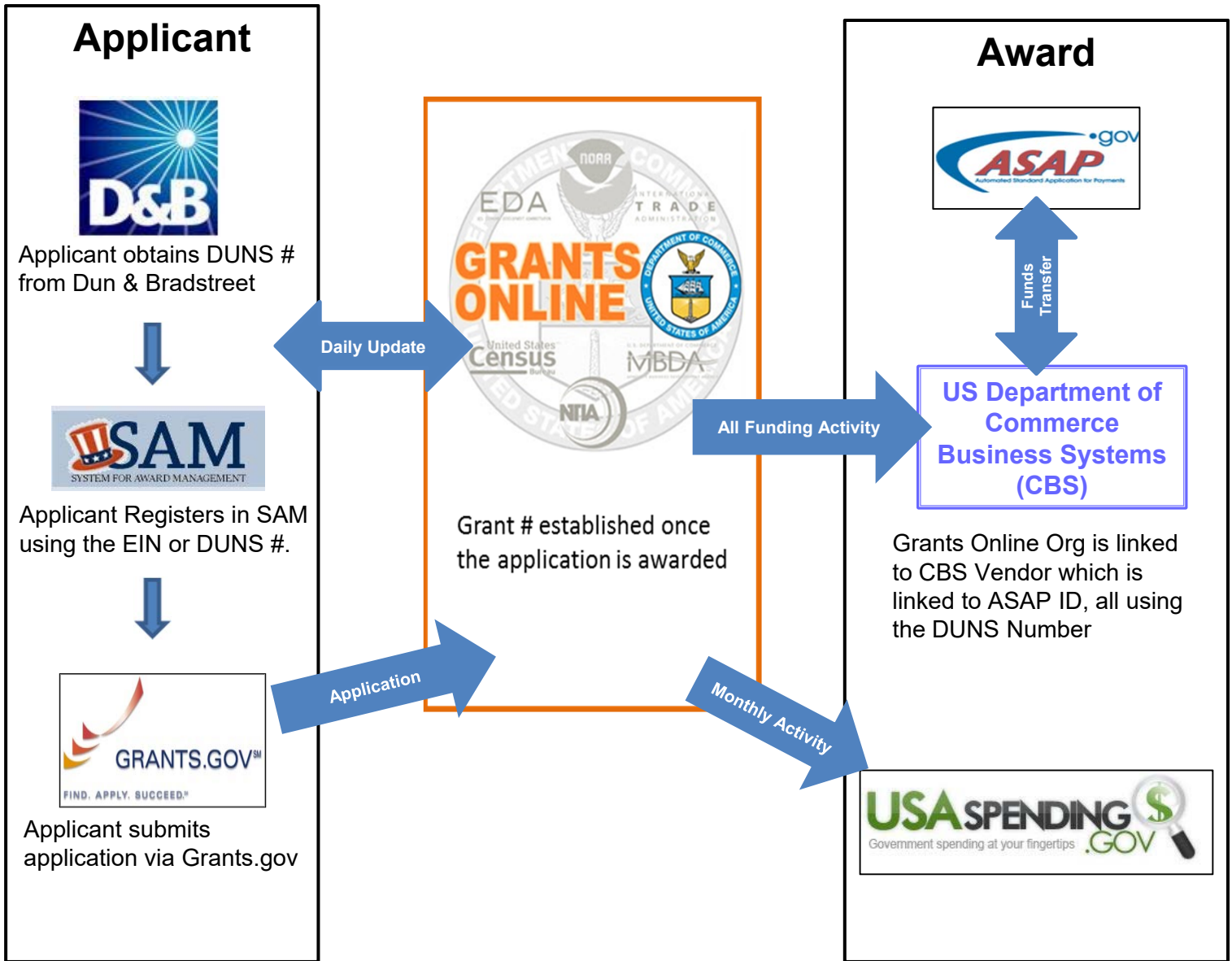
All requirements questions must be answered before the application can be approved or rejected for minimum requirements.

[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.

Federal Grants System DUNS Relationships

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



Due Diligence

Completed using the DUNS Number



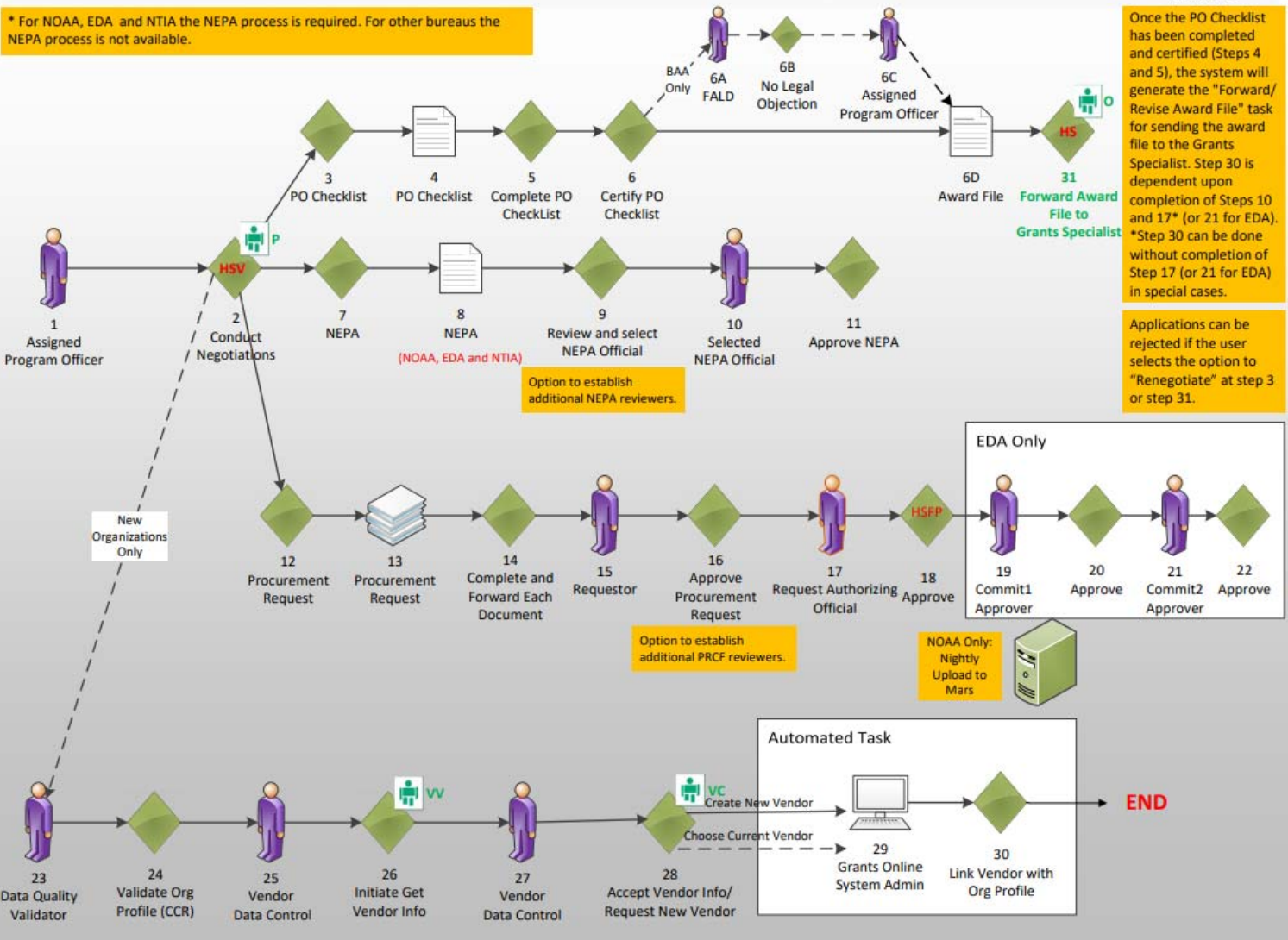
Universal Process – Prepare Applications for Funding

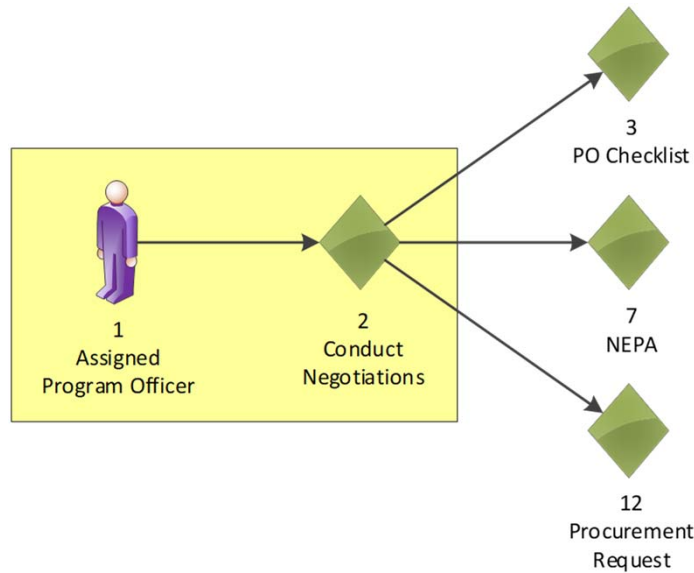
Prepare Applications for Funding Overview (UNI-3)

April 29, 2019

Version 4.27

* For NOAA, EDA and NTIA the NEPA process is required. For other bureaus the NEPA process is not available.





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	2199761	1795527	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):

Use format MM/DD/YYYY for date fields.
 Project Start Date: * Project End Date: * Submitted Date:
 State Received Date: Federal Agency Received Date: * Time: * Eastern
 Applicant Identifier: State Application Identifier: Federal Identifier:

Applicant Information [Organization Profile](#)
 Legal Name: * [Org Lookup](#)
This Applicant has been automatically assigned a Grants Online Organization based on unique DUNS number match.
 Department Name:
 Division Name:
 Duns Number: * (9 or 13 digit number) EIN Number: * (xx-xxxxxxx)
 Street:
 City: County:
 State: * Province:
 Country: Zip:

Name and Telephone number of person to be contacted on application matters
 Prefix: First Name: Middle Name: Last Name: Suffix:
 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 has been automatically assigned a Grants Online Organization based on unique DUNS Number match."

Proceed to Step 2.

Scenario 2: DUNS Number was not entered on the Application but the Organization exists 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
 Legal Name: * Bangor Publishing Company **Org Lookup**
 Department Name:
 Division Name:
 Duns Number: * EIN Number: * (xx-xxxxxxx)
 (9 or 13 digit number)
 Street:
 City: County:
 State: * Maine Province:
 Country: Zip:

Please Associate an Organization within Grants Online using the Org Lookup button.

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.

Select Organization

Enter your search criteria to find the organization.

Organization Name:
 Address-City:
 DUNS Number: 001096643
 EIN Number:
 Address-State: Please select a state

Search **Cancel**

[Add a new organization >>](#)

One item found.1

Select	Org ID	Name	Bureau	Address	DUNS	DUNS+EIN	Cage Code	ASAP Id	Active
Select	2002880	BANGOR PUBLISHING COMPANY	NOAA	491 MAIN ST, BANGOR, ME 04401-6296 USA	001096643	987654321			true

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.

Proceed to Step 2.

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.

Proceed to Step 2.

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):

Use format MM/DD/YYYY for date fields.
 Project Start Date: * Project End Date: * Submitted Date:
 State Received Date: Federal Agency Received Date: * Time: * Eastern
 Applicant Identifier: State Application Identifier: Federal Identifier:

Applicant Information
 Legal Name: * **Org Lookup**
 Please Associate an Organization within Grants Online using the Org Lookup button.
 Department Name:
 Division Name:
 Duns Number: * EIN Number: *
 (9 or 13 digit number) (xx-xxxxxxx)
 Street:
 City: County:
 State: * Province:
 Country: Zip:

Select Organization

No search results were found. Please change your criteria and search again.
 Enter your search criteria to find the organization.

Organization Name
 Address-City
 DUNS Number
 EIN Number
 Address-State

Search **Cancel**

[Add a new organization >>](#)

Nothing found to display.

Select SAM Organization

One or more organizations matching your search criteria were found in the System for Award Management (SAM) database. Select a SAM organization to initialize the new organization from SAM data or select "Add a new blank organization" to create an organization that is not initialized from a SAM organization.

One item found.1

Select	Sam ID	Name	Address	DUNS	DUNS+EIN	Cage Code	Active
<input type="checkbox"/>	46795	GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION	2900 S QUINCY ST STE 375, ARLINGTON, VA 22206-2231 USA	878128073	987654321	1DGJ8	true

[Add a new blank organization >>](#)

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 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. For example, when an organization converts from non-ASAP to ASAP, the non-ASAP record will be made inactive so that it cannot be selected for a new award. If there are any closed awards for that organization before it converts to ASAP, they will remain associated with the non-ASAP record but the active ones will become associated with the ASAP record.
3. You will be able to tell whether or not an organization is already set up in ASAP by the presence of an ASAP ID in the search results. If an organization record is non-ASAP, but that Organization has been ASAP in the past, please contact the Grants Online Help Desk.

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

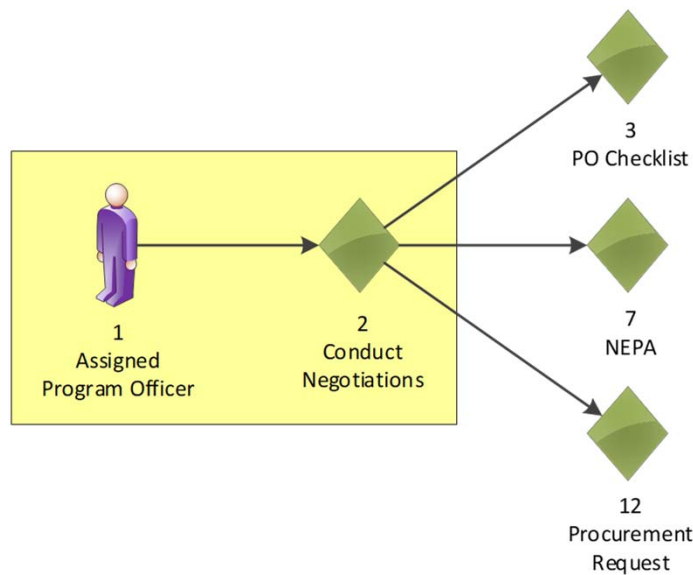
SAM Mailing Address

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

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:	Notifv Recipients:	N/A	02/05/2011	REA	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:

Principal Place Of Performance: [Search FIPS Data](#) [Guidance](#)

Step 2: Select Construction, Non-Construction or Both

Authorized Representative

Prefix: First Name: Middle Name: Last Name: Suffix:

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

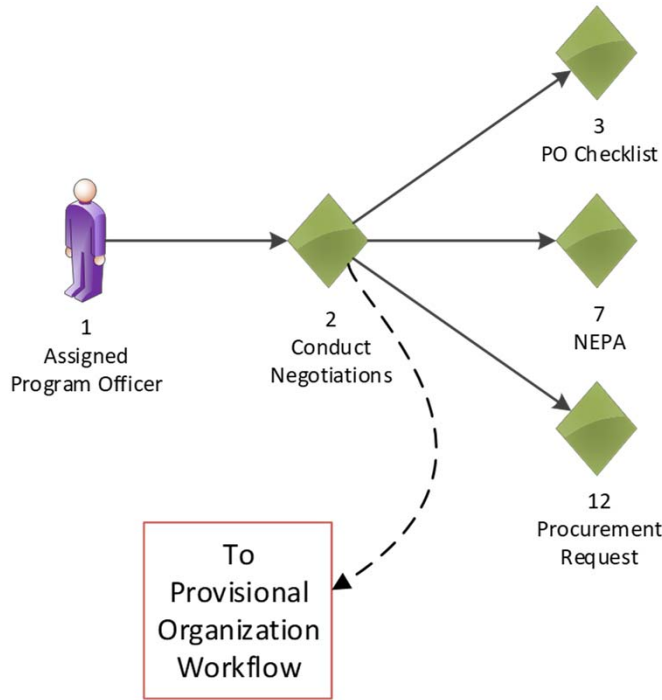
Award Number:

[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: Status: [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	Test/Training App 1 for Not Release 4.06 Comp RFA 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 In Release 4.06 Comp RFA 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 Not Release 4.06 Comp RFA 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 - Test App 1

(NEPA - NOAA, NTIA, EDA Only)

Award File In Progress - NA12GOT9990022

Id: 2245442
Status:

Action: [Submit](#)

Your Comments:

[Spell check](#)

[Save Comment](#)

[Print Award File History](#)

Attachments:

Pending Actions X

5 items found, displaying all items.1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status
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

- In the Universal application process, the Provisional Organization workflow is initiated at the same time as the PO Checklist, NEPA, and Procurement Request when the FPO chooses **Negotiations Complete**. However, the Organization Profile task for the Provisional Organization Workflow is not in the FPO's Inbox. Rather it is created in the Inbox of a new Grants Online user called the Data Quality Validator. The FPO can monitor the progress of the Organization Profile by checking under "Pending Actions" on the Award File launch page.
- Until the Provisional Organization workflow is completed, the FPO will not have an option to Certify the PO Checklist and the Budget Officer will not have an option to Approve the Procurement Request.
- The user will have either two (2) or three (3) new tasks in his/her Inbox. (If there are no new tasks in the Inbox, click the **Inbox** tab to refresh the screen display.) Only NOAA, NTIA, and EDA receive the NEPA Document. The other bureaus only receive the PO Checklist and the Procurement Request.
- 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 (and if appropriate the NEPA) have completed their approval process 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.)



Grants Online Training

Competitive RFA / NOFO Creation

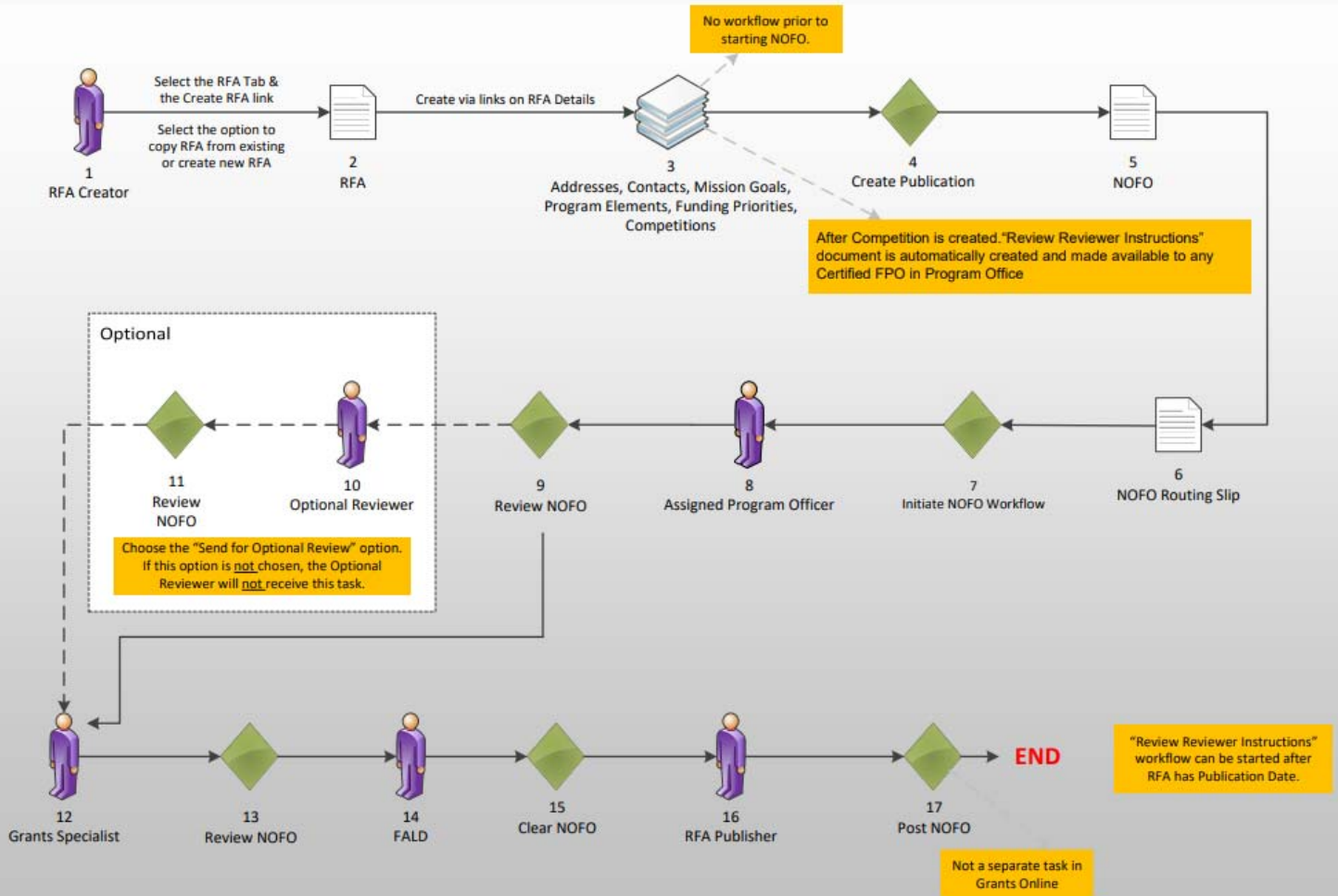
August 2019

Competitive Process – RFA Creation

Create & Review RFA and Publish NOFO Overview (COMP-1)

April 29, 2019

Version 4.27



Universal and Competitive RFA Fields Posted to Grants.gov

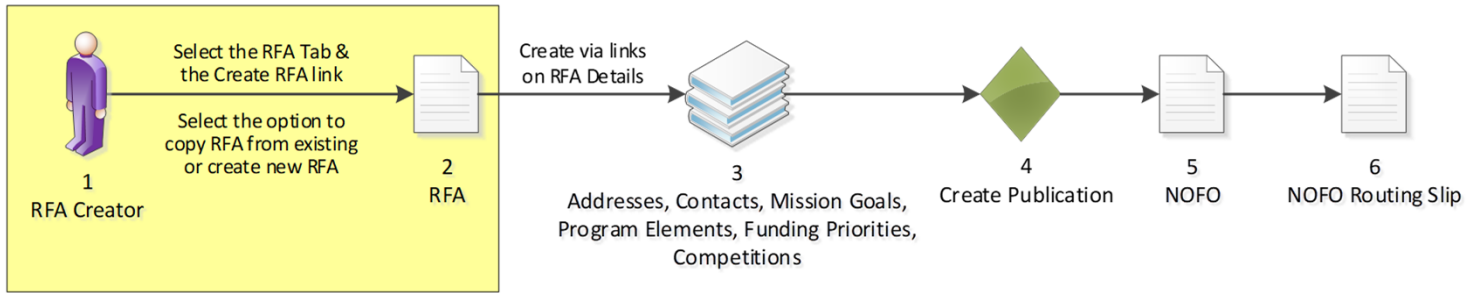
- Opportunity Number – *Federal Opportunity Number*
- Opportunity Title – *RFA Name*
- Opportunity Category – (Competitive RFA → “Discretionary”; Universal RFA → “Other”)
- Category Explanation – (If Opportunity Category is “Other”): *RFA Type*
- *CFDA Number*
- Posting Date – *Publication Date*
- Close 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 – *NOFO Details screen, Section III. A*
- Cost-Sharing or Matching Requirement – *“Yes” or “No” (based on NOFO) 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 – *NOFO 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 Header Information

Document ID 2147932

RFA Name*

Fiscal Year* (YYY)

Announcement Type Initial

Anticipated Publication Date* (MM/DD/YYYY) **** Competitive Only**

Funding Opportunity Number

Line Office* NOAA Grants Online Training (GOT)

Assigned Program Office*

Assigned Program Officer*

CFDA Number*

Sub Program

RFA Name*

Fiscal Year* (YYY)

Announcement Type Initial

Anticipated Publication Date* (MM/DD/YYYY) **** Competitive Only**

Line Office*

Assigned Program Office*

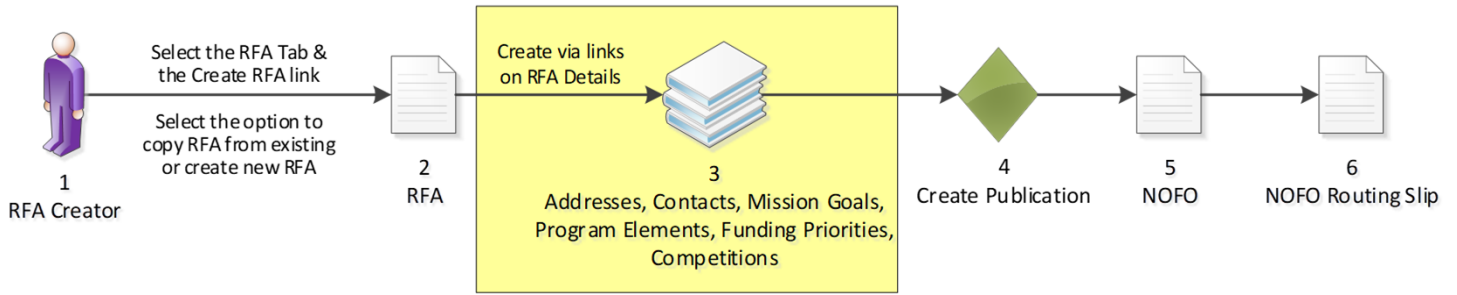
Assigned Program Officer*

CFDA Number*

Sub Program

Save **Cancel**

- 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.
- Choose **One Commerce Program Office (OCPO)** 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 (for training – “NOAA”)
 - Second component – Line Office (for training – “GOT”)
 - NOTE:** For organizations where the Bureau and Line Office are the same, the Line Office is not included
 - Third component – Program Office (for training – “OCPO”)
 - 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:

Street Address:

City:

State:

Zip:

Search

Search Results

Nothing found to display.

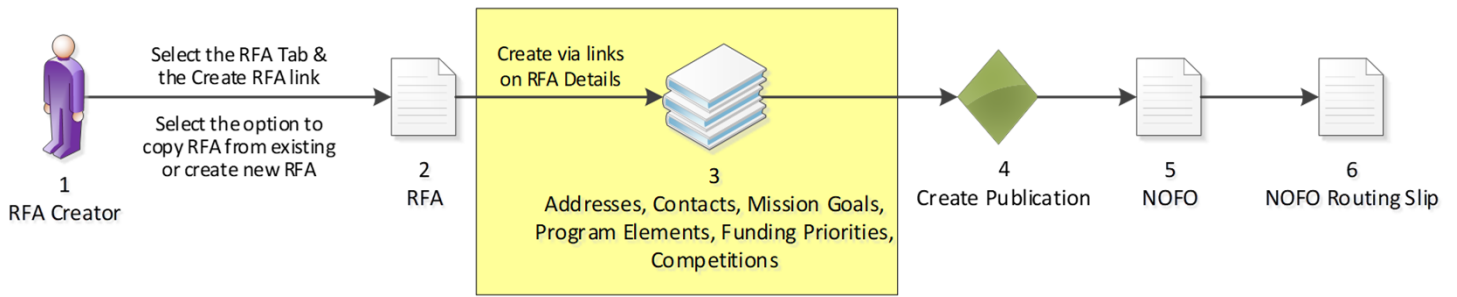
Add to RFA

Selected Addresses for this RFA

Nothing found to display.

Remove from RFA

Done



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](#)

Add Program Element/Funding Priority

Label: e.g. I, A, 1., 1), 1.a.

Name: *

Note: Reports and screen listings will use the label if entered. Otherwise, the name will be used.

Description:

Description of Program Element "A" goes here.

45 / 4000

Program Element/Funding Priorities

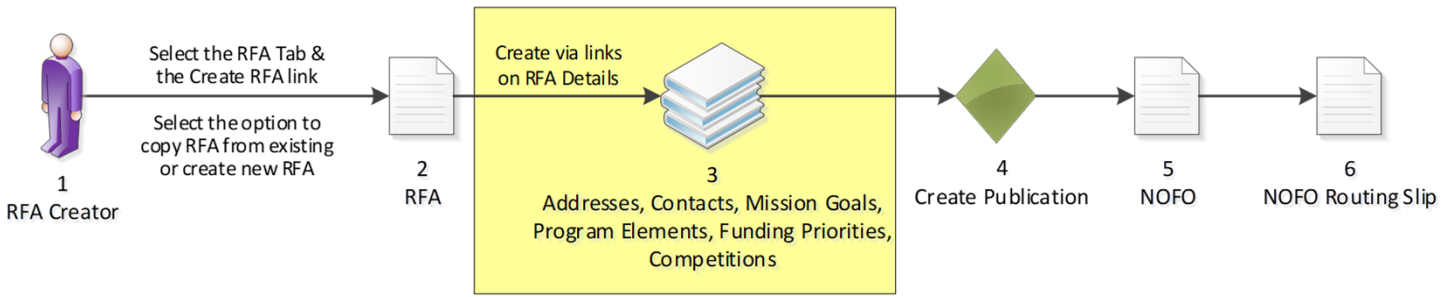
Order	Label	Name	Description	Edit	Delete
1	A	First Program Element/Funding Priority	Description of Program Eleme	Edit	Delete
2	B	Second Program Element/Funding Priority	Description of Program Eleme	Edit	Delete

[Reorder](#)

[Add New](#)

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 * Fiscal Year *

Competition Type * Group Individual Qualification

Assigned Program Office *

Competition Manager *

Application Routing *
No Program Officers are assigned to receive applications
 Workload State
[View/Edit](#)

Application Package *
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
8	Data Management Plan

[View/Edit](#)

Special Award Conditions
No Special Award Conditions are associated with this competition.
[View/Edit](#)

Review Events No review events are associated with this competition.
[Add New >>](#)
[Edit Notification Template for](#)

NOTE: Review Events are required for the Competitive Process but can be completed outside of Grants Online.

Competition Name * Fiscal Year *

Competition Type * Group Individual Qualification

Assigned Program Office *

Competition Manager *

Selecting Official *

	Min	Max
Anticipated Federal Funding for this Competition *	<input type="text"/>	<input type="text"/>
Required Federal Funding (in Dollars) per Application	<input type="text"/>	<input type="text"/>
Cost Share (%) per Application	<input type="text"/>	<input type="text"/>

Anticipated Competition Schedule

Pre-Application Due Date Time: Eastern

Application * Due Date Time: Eastern

Anticipated Award Date * Days after Application Due Date

Review Criteria Type: * Agency Standard Fellowship [Guidance](#)

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

NOTE: For more information please reference item #7 on the FPO Training Resources site – SAC (Special Award Conditions) Quick Reference Guide:
http://www.corporateservices.noaa.gov/grantsonline/gol_training_FPO.htm

- By default, the RFA name is the same as the Competition Name. Make changes as appropriate. Enter the Fiscal Year.

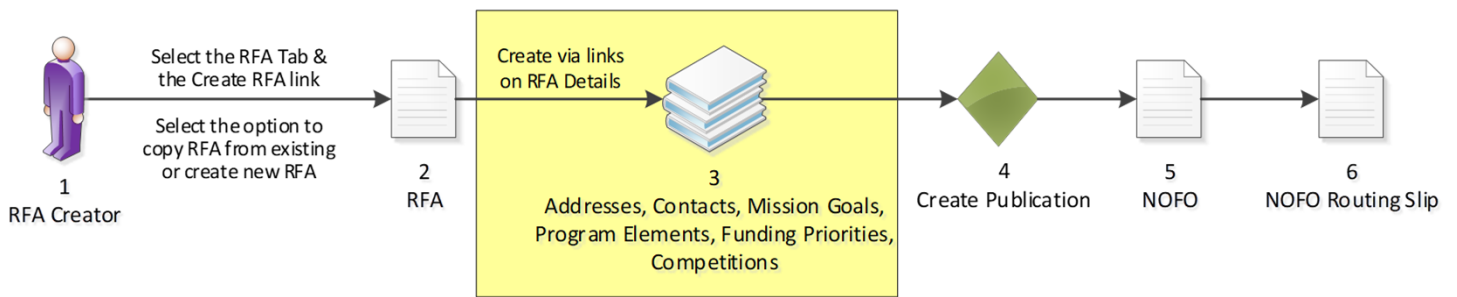
NOTE: There can be competitions for more than one fiscal year in a single RFA.

- 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.

- 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 **Internal Reviewer** for 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 three Award File tasks: 1) the PO Checklist; 2) Procurement Request; and 3) NEPA Document. 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 Manager:*

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:* Anticipated Review End Date:*

[Add Agency Standard Criteria](#) **NOTE: This link is only available for NOAA.**

Points Scoring Criteria

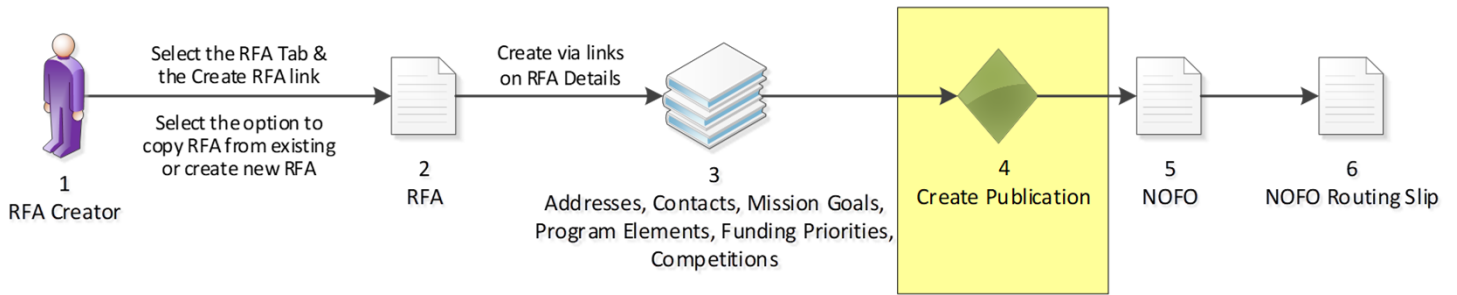
Name	Reviewer Comments	Reviewer Score	Minimum Score	Maximum Score	Action	Action
Technical/Scientific Merit	Required	Required	5.0	20.0	Edit	Delete
Importance/Relevance and Applicability of Proposal to the Program Goals	Required	Required	5.0	20.0	Edit	Delete
Overall Qualification of Applicant	Required	Required	5.0	20.0	Edit	Delete
Project Costs	Required	Required	5.0	10.0	Edit	Delete
Outreach and Education	Required	Required	5.0	10.0	Edit	Delete
Data Management Plan Technical Soundness	Required	Required	5.0	20.0	Edit	Delete

[Add New >>](#) [Reorder >>](#)

[FFO Evaluation Criteria Report](#) [Application Review Scoring Sheet](#)

At this point, you need to know some basic information regarding the Review Event(s). These details should reflect the information posted in the NOFO regarding evaluation criteria and, for the most part, should not be changed after the NOFO 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).



Competition

Id: 2199731

Status:

Action:

Your Comments:

Workflow Analysis

The following needs to be completed before applications can be selected for competition:

- The RFA must be published.
- Reviewer Instructions must be reviewed by FALD.
- There must be applications that have passed minimum requirements.

RFA

Id: 2199641

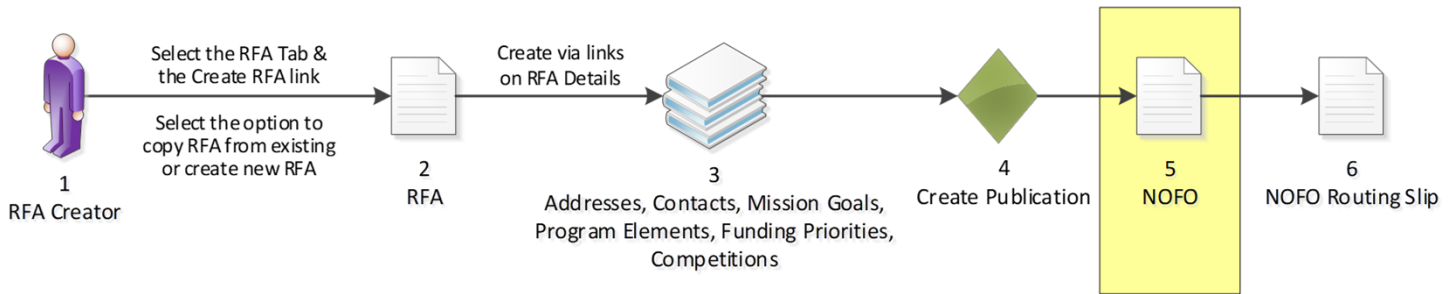
Status:

Action:

Your Comments:

Attachments:

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 NOFO.



<p>Notice of Funding Opportunity</p> <p>Please click on this icon to view the audit trail on this N</p> <p>Please read the appropriate guidance documents bef</p> <p>Regulatory Information Number (RIN) <input type="text" value="0000"/></p> <p>Executive Summary</p> <p>Federal Agency Name <input text"="" type="text" value="Initial"/></p> <p>NOFO Number <input type="text" value="NOAA-NOS-NCCOS-"/></p> <p>Catalog of Federal Domestic Assistance (CFDA) Number <input type="text" value="11.482, Coral Reef C"/></p> <p>Dates <input checked="" type="checkbox"/></p> <p>Funding Opportunity Description <input checked="" type="checkbox"/></p>	<p style="text-align: center;">Grants Online</p> <p style="text-align: center;"><u>Notice of Funding Opportunity,</u></p> <p style="text-align: center;"><i>and</i></p> <p style="text-align: center;"><u>Federal Register Notice</u></p> <p style="text-align: center;">Document Creation Assistance</p> <p>MUST have a Notice of Funding Opportunity (NOFO). The NOFO will be availa</p> <p>primary reference document for applicants. All grant programs must continue to c</p> <p>grant provisions, such as application requirements, evaluation criteria and selection</p> <p>cial Assistance law Division (FALD) will forward to the Office of the Assistant C</p> <p>O announcements with funding that exceeds \$100 million and announcements for</p> <p>arance of those announcements with the Office of Management and Budget (OMB</p>
<p>Full Text of Announcement</p> <p>I. Funding Opportunity Description</p> <p>A. Program Objectives <input checked="" type="checkbox"/></p> <p>B. Program Priorities (empty)</p> <p>C. Program Authority (empty)</p> <p>II. Award Information</p> <p>A. Funding Availability (empty)</p> <p>B. Project/Award Period (empty)</p> <p>C. Type of Funding Instrument (empty)</p> <p>III. Eligibility Information</p> <p>A. Eligible Applicants (empty)</p> <p>B. Cost Share or Matching Requirement <input checked="" type="checkbox"/></p>	<p>ersede any statutory or regulatory requirements to publish a Notice of Funding Op</p> <p>must still publish such notices if required to do so by any law or regulation. For th</p> <p>Federal Register Notices.</p> <p>ill be posted at Grants.gov throughout the fiscal year. Federal Program Officers ar</p> <p>ted as an the Optional Reviewer prior to your NOFO being routed to FALD.</p> <p>ndard format, as required by the Office of Management and Budget. Additionally,</p> <p>artment") has determined that there will be a required standard format, modeled on</p> <p>OFO, you are also creating the wording for publication in the Federal Register No</p> <p>e outline and format of the Notice of Funding Opportunity details page that you v</p> <p>ice of Funding Opportunity report, which will be posted at Grants.gov. Fields on t</p>

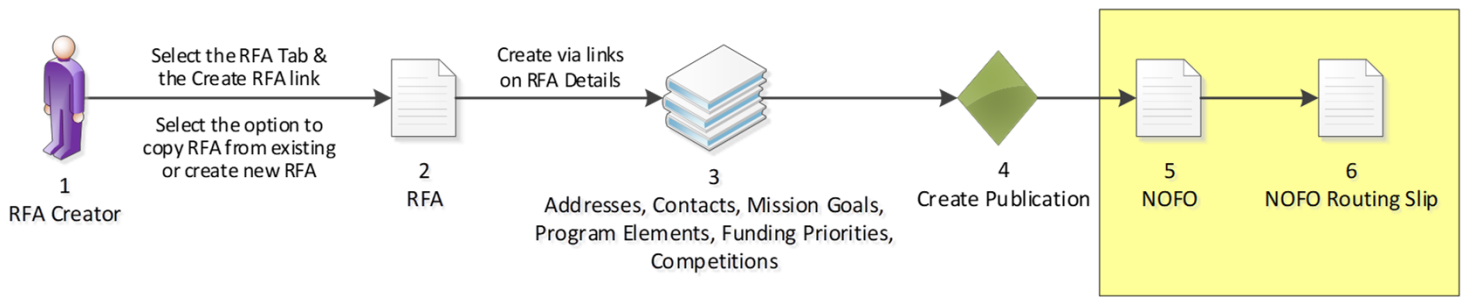
- Data previously entered into other parts of the RFA will not carry over to these fields. This forces the user to format the paragraphs appropriately for publication. Similarly, if the “Create New from Existing” option was used to create the RFA, the publication’s fields are blank. Again this forces the user to format the paragraphs appropriately for publication.
- Formatting (bold, italics, underline, etc.) is currently unavailable at this time for NOFOs. 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 NOFO screen and guidance screen can be displayed side-by-side. Use the samples from the guidance document to complete information for the NOFO. 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 NOFO. 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 45 DAYS AFTER PUBLICATION>. 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 NOFO 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.

NMFS NOTE:

NMFS requires a funding statement under Funding Availability that states: "Actual funding availability for this program is contingent upon Fiscal Year 20XX Congressional appropriations."



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 NOFO 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 NOFO 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

Competitive RFA Review and Processing

August 2019

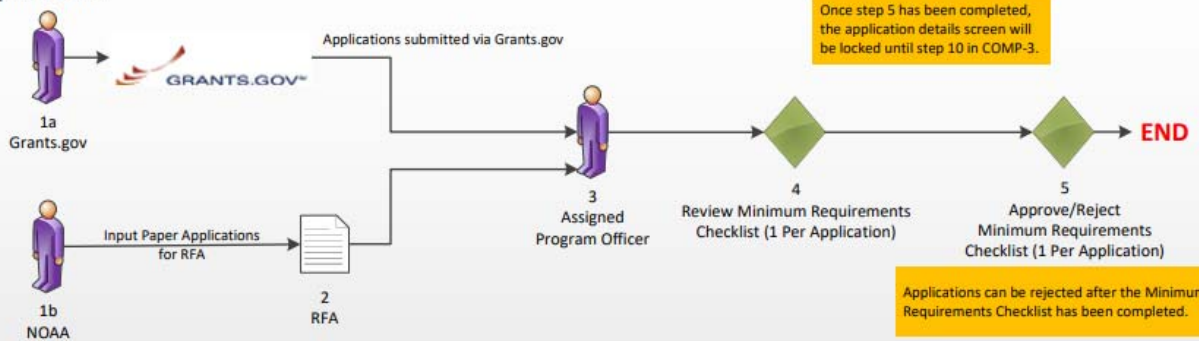
Competitive Process – Application and Review Event

Applications and Review Event Overview (COMP-2)

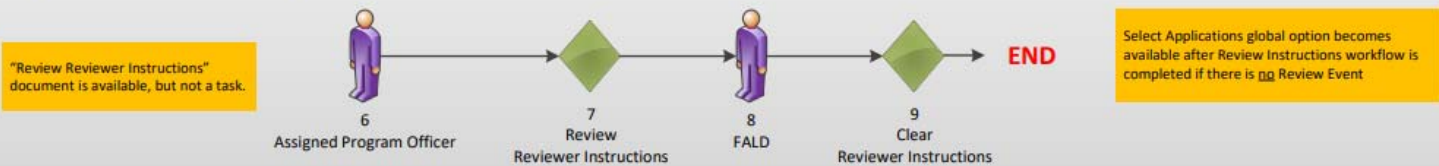
April 29, 2019

Version 4.27

Receive applications



Review Reviewer Instructions



Review Event Workflow

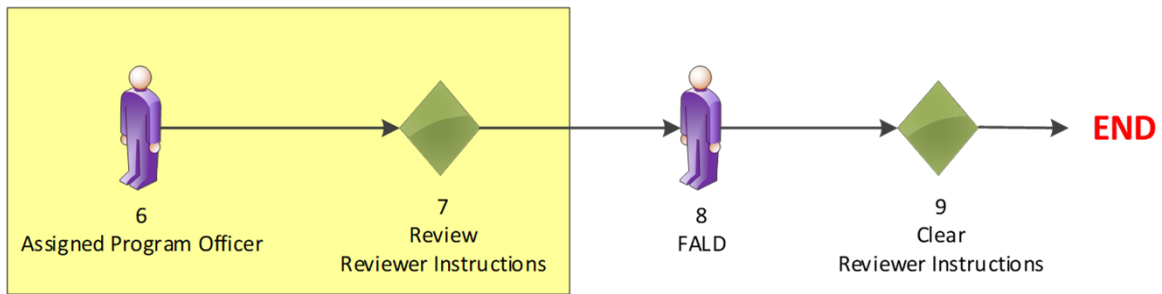
Only if Review Event Exists

- Review Events are optional in Grants Online.
- Review can be conducted using Grants Online functionality or outside of Grants Online



At this point we will follow the same steps to input a paper application that we used for the Universal process, please reference **Pages 37 - 39** of this Training Manual.

For further details of the Review Event and Reviewer processes, please reference **Pages 73 & 74** of this Training Manual.



Sub Documents

Type	ID	Title	Status
Applications Report	2281181	Applications Report	
Selected Applications	2281181	Selected Applications	
Review Event	2281183	Review Event #1 -- created December 14, 2015	
Review Event	2281203	Review Event #2 -- created December 14, 2015	ManageReviewEvent - Not Started
Reviewer Instructions	2281182	Reviewer Instructions for Review Event #1 -- creat...	FALDActions - Complete
Reviewer Instructions	2281204	Reviewer Instructions for Review Event #2 -- creat...	FALDActions - Complete

Export options: [Excel](#)

Reviewer Instructions

Attachments:

Name	Short Description	Created Date	Internal Use Only	FALD Reviewed	Remove
2nd screen shot for page 102.docx	This is where I would describe the Reviewer Instructions	01/27/2016 03:41:34 PM	No	No	Remove

Add new Attachment: [\[+\]](#)

Any changes to information on this page should be saved before adding or removing attachments.

Save

Logistical Reviewer Instructions

Attachments:

No attachments.

Add new Attachment: [\[+\]](#)

Any changes to information on this page should be saved before adding or removing attachments.

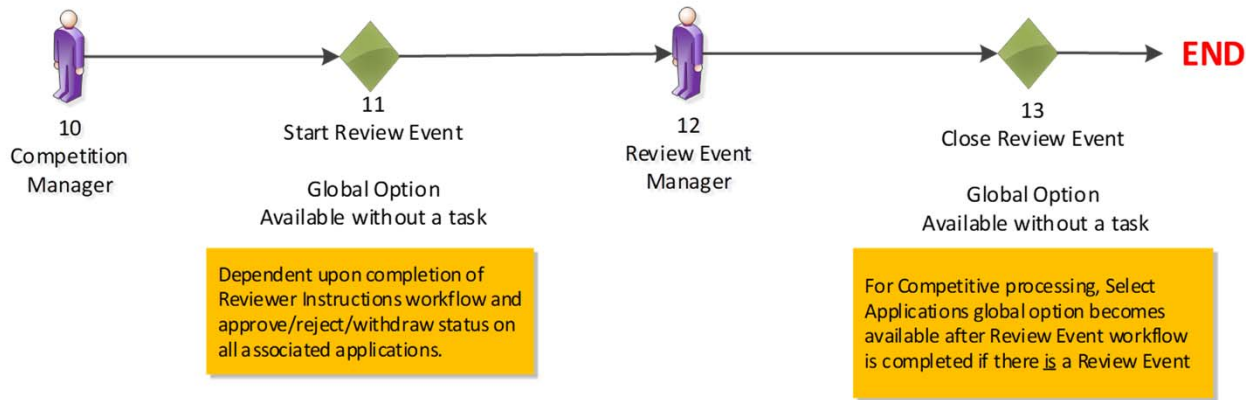
Done

Note:

The Logistical Reviewer Instructions may only be used for attaching instructions related to travel and meeting dates, times and locations, as well as meeting requirements. DO NOT attach any instructions on how to how to conduct the review, review priorities, etc. The Logistical Reviewer Instructions do not require FALD review.

- Prior to starting the Review Event, the Reviewer Instructions must be reviewed by FALD. The FPO will not have the option to start the Reviewer Instructions workflow until FALD approves the Reviewer Instructions. To start the workflow, navigate to the Competition launch page and click the ID link for the Reviewer Instructions (under the sub-documents section).
- There are two sections on the Reviewer Instructions Details page:
 - The top section is mandatory and must be completed. Reviewer Instructions provide the procedural/technical requirements for conducting the review. All attachments should be added to the application prior to starting the workflow.
 - The bottom section (Logistical Instructions) is optional. Logistical Instructions are intended for panel reviewers and detail the logistics of convening a panel to review applications. FALD review and approval is not required for this component of the Reviewer Instructions.

Only if Review Event Exists



Inbox | RFA | Application | Awards | Account Management | Reports | Help

Welcome to Grants Online Ms. Grants A. Student25. You are logged in to TRAIN1P. [Log Off](#)

Advisories >> Tasks >> Search RFAs >> RFA >> Competition >> Independent Individual Merit Review

Independent Individual Merit Review

Id: 2279925
Status:

Action: Please select an action

Your Comments: Please select an action
Start Review Event
View Review Event Details

Independent Individual Merit Review

Id: 2279925
Status: ManageReviewEvent - Not Started

Action: Please select an action

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

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](#)

- 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”. The Review Event functionality will be demonstrated during the Open Forum Session Wednesday afternoon.
- 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**.

Competitive Process – Review Event

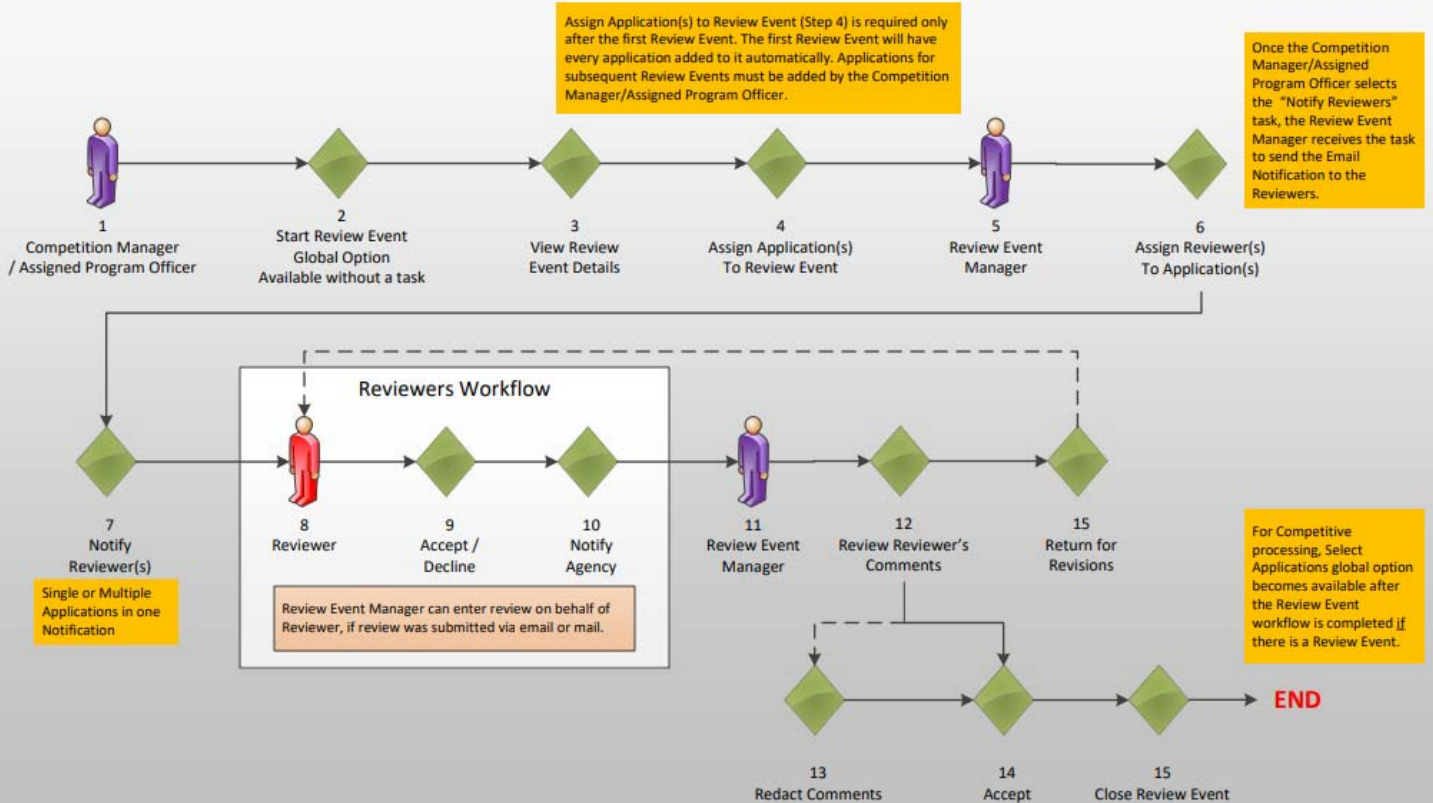
Review Event Workflow – Federal Agency (REF)

July 17, 2019

Version 4.28

Only if Review Event Exists

- Review Events are optional in Grants Online.
- Review Event is conducted for both Competitive and Universal, if chosen.
- Review can be conducted using Grants Online functionality or outside of Grants Online.



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

Review Event Guidance

- 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

Competitive Process – Reviewer

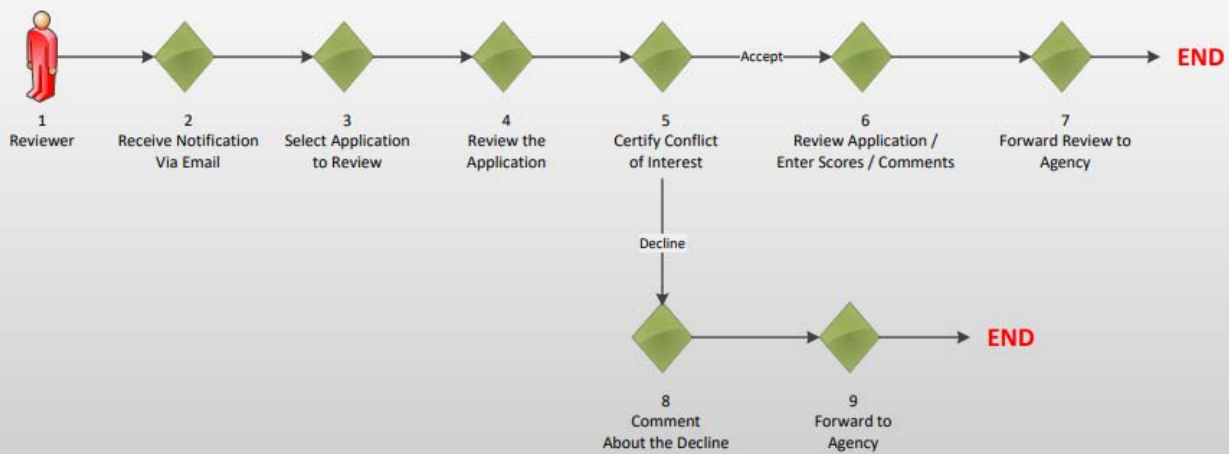
Review Event Workflow – Reviewer (RER)

July 17, 2019

Version 4.28

Federal Employees determine the Conflict of Interest by the Federal Ethics Laws.
Non-Federal Employees determine the Conflict of Interest by the Reviewer Conflict of Interest and Confidentiality Certification for Non Governmental Peer Reviewers form.

Single or Multiple Applications in one Notification



The Review Event Manager will see the Status Decline Flag under Manage Review Event.

Competitive Process – Select Applications for Funding

Competitive Process (COMP-3)

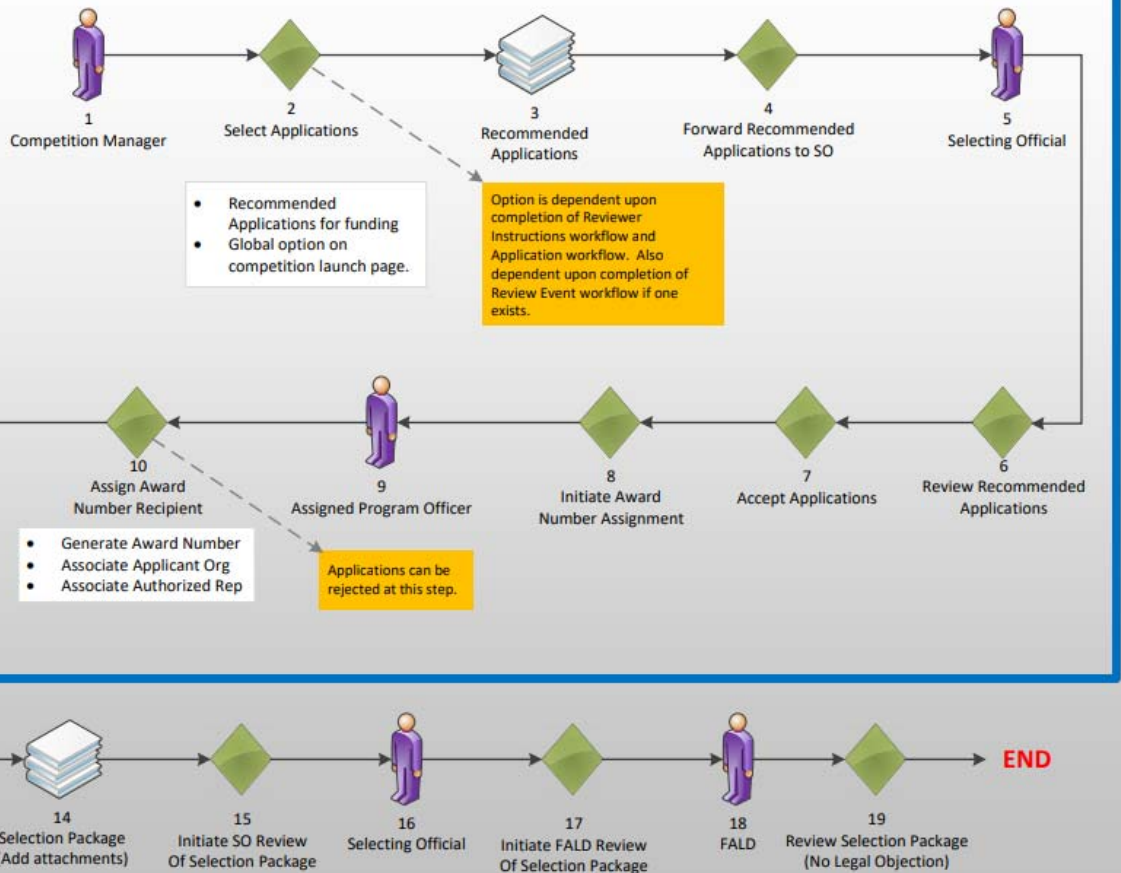
Select Applications for Funding Overview

April 29, 2019

Version 4.27

Competition Page

NOTE: "Select Applications" option remains available on the Competition Launch page. This is a global option which is available even when the user does not have a "Select Applications" task. Each time this option is chosen and additional applications are selected, the entire selection process must be repeated.



From this point forward, the "Selection Package" page will be displayed.

Selection Package Page

During the class, the Select Applications workflow will be demonstrated using the Instructor's RFA. Students will have tasks at Steps 9-11 to assign Award numbers to the application. This step is functionally the same as the "Conduct Negotiations" step of the Universal Application Processing workflow. For further details, please reference **Pages 42 - 47** of this Training Manual.

When the Award number has been generated, click Save and Return to Main. Next, choose the option to Forward to Competition Manager for Selection Package. After the last application has completed this step, the Competition Manager will receive the next task to Review the Selection Package. After the Competition Manager reviews the package, it can be prepared for approval by the Selecting Official and FALD.

Steps 12-15

- At this point, the Competition Manager attaches all of the pertinent Selection Package documents (e.g., Reviews, Conflict of Interest Forms, Rank Order of Applications, etc.) to the Selection Package. The Selection Package and all its component parts, are sent for final approval.
- If the Selecting Official does not log into Grants Online, a copy of the Approving Document with the signature of the Selecting Official should be scanned and included as an attachment with the Selection Package.

Steps 16-17

- This constitutes the Selecting Official's approval of the Selection Package.

Steps 18-19

- If satisfied with the Selection Package, the FALD attorney will initiate the Award File workflow by choosing the "No Legal Objection" option. This will generate another "Selection Package" task for the Competition Manager. At this point the Competition Manager can, at their discretion, select additional applications and send the Selection Package back through the approval process.

NOTE: If FALD has issues with the Selection Package, they may return it to the Selecting Official once with the action: "FALD Comment." The Selecting Official has an option to follow or not follow the FALD's advice. However, the Selecting Official must send the Selection Package back to FALD. FALD can review the actions taken by the Selecting Official, but after that FALD will only be able to select the "No Legal Objection" workflow option – even if they have a legal objection.

Competitive Process – Start Award Processing

Start Award Processing Overview (COMP-4)

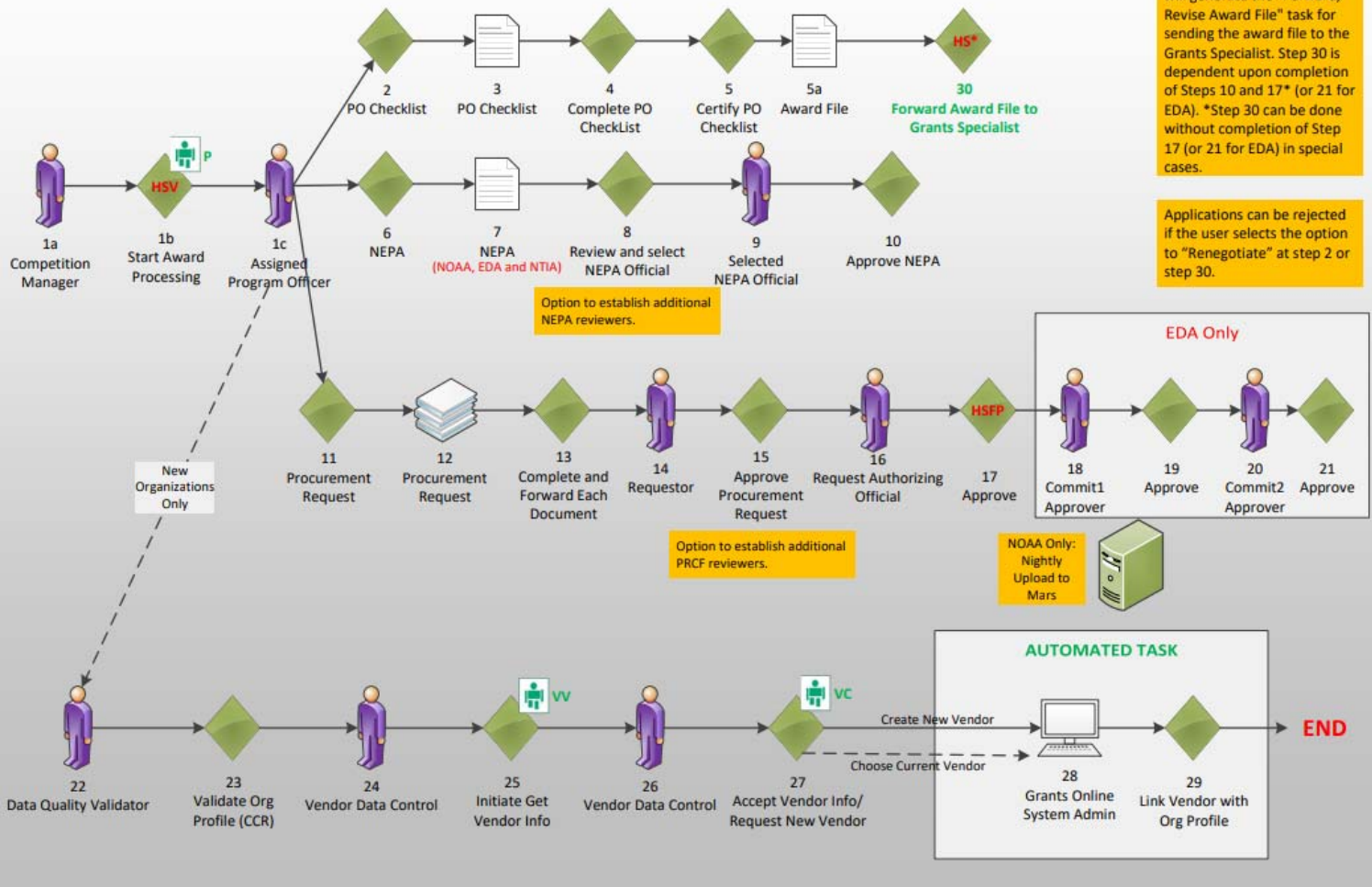
April 29, 2019

Version 4.27

* For NOAA, EDA and NTIA the NEPA process is required. For other bureaus the NEPA process is not available.

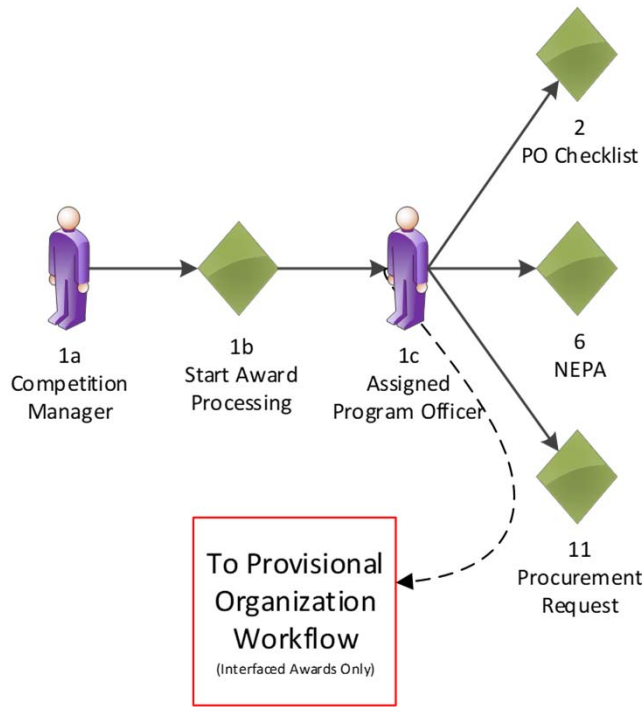
Once the PO Checklist has been completed and certified (Steps 4 and 5), the system will generate the "Forward/Revise Award File" task for sending the award file to the Grants Specialist. Step 30 is dependent upon completion of Steps 10 and 17* (or 21 for EDA). *Step 30 can be done without completion of Step 17 (or 21 for EDA) in special cases.

Applications can be rejected if the user selects the option to "Renegotiate" at step 2 or step 30.



Steps 1a-1b

- To move forward with application processing, the Competition Manager chooses the option to **Start Award Processing** from the “Review Selection Package” task. After an award is checked and the **Save** button is clicked, the system will immediately generate an Award File with a PO Checklist, a NEPA document, and a Procurement Request. These documents are delivered to the Inbox of the Assigned Program Officer (the person who has been working on the application). The Competition Manager can return to this task and start the award processing as needed for each selected application. The “Review Selection Package” task will remain in the Competition Manager’s Inbox until the “Terminate Selection Package Processing” option is selected.



Your Tasks

Document Type: Status: [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	Test/Training App 1 for Not Release 4.06 Comp RFA	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 In Release 4.06 Comp RFA	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 Not Release 4.06 Comp RFA	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 - Test App 1

(NEPA - NOAA, NTIA, & EDA Only)

Award File In Progress - NA12GOT9990022

Id: 2245442
Status:

Action: [Submit](#)

Your Comments:

[Spell Check](#)

[Save Comment](#)

[Print Award File History](#)

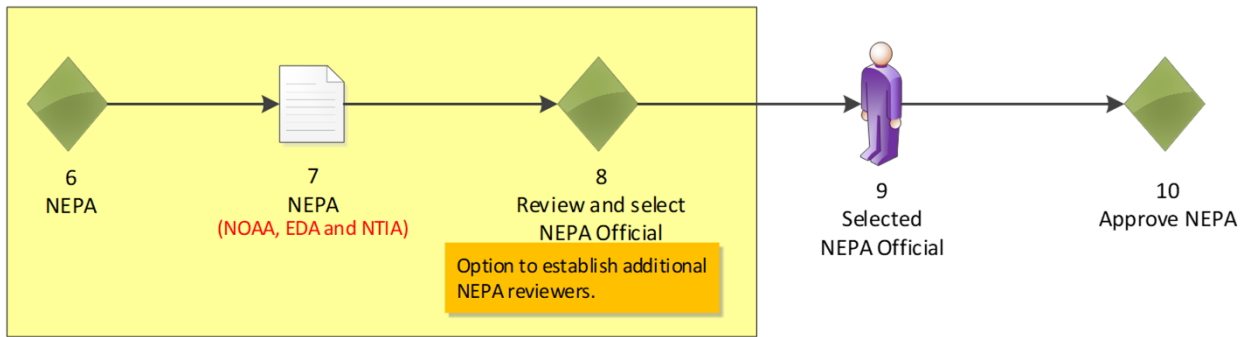
Attachments:

Pending Actions X

5 items found, displaying all items.1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status
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

- In the Competitive application process, the Provisional Organization workflow is initiated at the same time as the PO Checklist, the NEPA Document, and the Procurement Request when the FPO chooses **Start Award Processing**. However, similar to the Universal Process, the Organization Profile task for the Provisional Organization Workflow is not in the FPO's inbox. Instead, it is created in the Inbox of the Data Quality Validator (a new Grants Online user role). The FPO can monitor the progress of the Organization Profile by checking "Pending Actions" on the Award File launch page.
- Until the Provisional Organization workflow is completed, the FPO does not have an option to Certify the PO Checklist and the Budget Officer does not have an option to Approve the Procurement Request.
- The user should now have three (3) new tasks in his/her Inbox. If not, the user should refresh his/her Task screen (Do NOT use the browser's "Back" button to refresh the screen display). An Award File has also been created in the database. These three tasks will move along three separate (but parallel) workflow paths. All three tasks, when completed, will comprise one Award File in the Grants Specialist's Inbox. The three tasks do not have to be completed in any particular order. However, the user should be aware that the Grants Specialist will return an "incomplete" Award File to the FPO. The Grants Specialist cannot start his/her portion of the workflow process until all three documents are complete in the Award File. The task, with the option to forward the Award File to the Grants Specialist, appears after you complete the PO Checklist. Therefore, the user should periodically check the Workflow History to make certain the Procurement Request and the NEPA Document have also completed their approval process before forwarding the Award File to the Grants Specialist.



NEPA Environmental Review Requirements - NA19NOS4

Attachments:

No attachments.

Add new Attachment: [+]

Any changes to information on this page should be saved before adding or removing

[Large File Guidance](#)

[Guidance](#)

a.) Level of Review *

Indicate below the level of environmental review that has been conducted for the proposed action.

- Categorical Exclusion (Attach memo if required.)**

[Select/View CE](#)

Nothing found to display.

- Finding of No Significant Impact associated with Environmental Assessment Programmatic Environmental Assessment.

- Record of Decision associated with Environmental Impact Statement.

- Other - Explanation in Attachment.

b.) Mitigating Measures

If either an EA or EIS was completed, did the analysis of the environmental impacts require the implementation of one or more mitigation measures?

- NO
- YES
- [Special Award Condition](#)

c.) Post Award NEPA Review Process

Does the proposal include funding for one or more projects that have not yet been identified and therefore NEPA review cannot be completed?

- NO
- YES
- [Special Award Condition](#)

d.) National Historic Preservation Act

Indicate below the conclusion of the review conducted per section 106 of the National Historic Preservation Act:

- No potential to cause effects (36 CFR § 800.3(a)(1))
- No historic properties affected (36 CFR § 800.4(d)(1))
- No adverse effect (36 CFR § 800.5(d)(1))
- Adverse effects resolved (36 CFR § 800.6)
- Not Required

Please Select a NEPA Official for routing purposes:

- Select A NEPA Official - ▼

[Save](#) [Save and Return to Main](#) [Cancel](#)

Categorical Exclusions

CE Category	CE Description
<input checked="" type="checkbox"/> 6.03a.3 (b)	Management plan amendments.
<input type="checkbox"/> 6.03a.3 (b)(1)	Management plan amendment may be categorically excluded from further NEPA analysis if the proposed change has no effect individually or cumulatively on the human environment and the proposed change has no effect individually or cumulatively on the human environment with a copy submitted to the NEPA Coordinator, and a brief statement with the record.
<input type="checkbox"/> 6.03a.3 (b)(2)	Minor technical additions, corrections, or changes to a management plan.
<input type="checkbox"/> 6.03b.2	Restoration Actions. The Damage Assessment and Restoration Program policy states that actions that may pose significant impacts on the quality of the human environment, and cumulatively have significant impacts on the human environment (e.g., actions with limited scope (40 CFR 1508.4)).
<input type="checkbox"/> 6.03b.2	Examples of Restoration Actions Eligible for a CE

NOAA, NTIA, and EDA ONLY

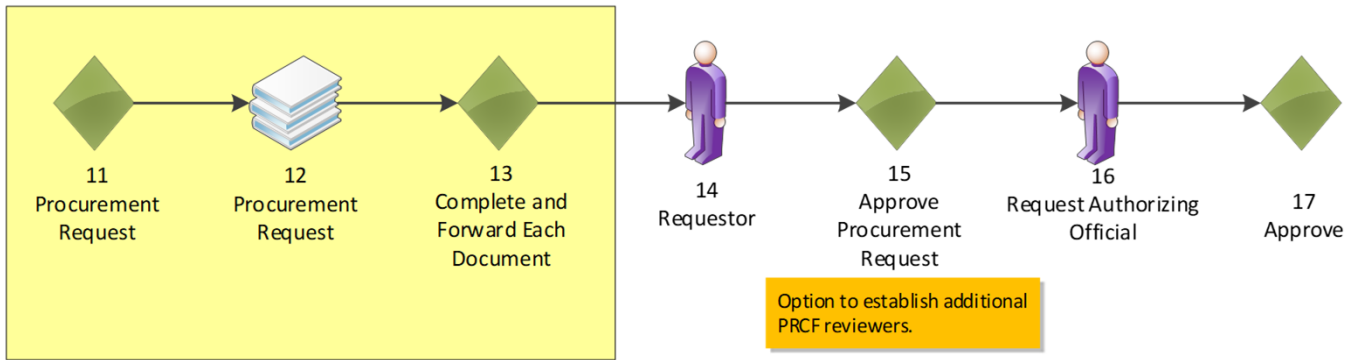
From the Action dropdown menu, choose **Complete NEPA Document** and click the **Submit** button. The NEPA Details screen displays four questions for which the user must provide a response. After responding to the questions, add any relevant attachments and identify the NEPA Official who will perform the final NEPA approval.

NOTE: The user can opt to send the NEPA document to NEPA Reviewers prior to forwarding to the NEPA Official. In that scenario, the NEPA document is sent to all identified NEPA Reviewers for the user's Program Office. The NEPA Reviewer who acts on the task first is the "owner"; the task is removed from the Inbox of all remaining NEPA Reviewers.

For this class choose **Internal Reviewer** as the NEPA Official. After clicking **Save and Return to Main**, choose **Forward NEPA Document** from the Action dropdown menu and click the **Submit** button. The user is redirected to his/her Inbox where s/he will see the NEPA Document task is no longer visible. The task has advanced to the next step in the workflow. The user can locate old tasks by changing the filter on his/her Inbox from "Open" to "Closed."

NOTE: For additional information regarding the NEPA process, please reference:

http://www.corporateservices.noaa.gov/grantsonline/NEPA_Guidance.html



Request Authorizing Official: *
None Selected.
[Search](#)

Additional Reviewers:
Nothing found to display.
[Add](#)
(Please note, you must press 'Save and Return to Main' for the Route to be committed)

Requestor: *
None Selected.
[Search](#)

The ACCS is valid

Validated: true

Bureau (xx): * 14

Fund (xx): * 1

Fiscal Year (yyyy): * 2019

Project - Task: * 28LEF29 - P00 **Step 1**

Program Code: 02 - 21 - 16 - 001

Organization: * 30 - 31 - 0002 - 00 - 00 - 00 - 00

Object Class: * 41 - 11 - 00 - 00

Unique Account Descriptor: [Select Descriptor](#) **Step 2**

Amount: * \$800.00 Fund: No

[Save](#) [DWValidate](#) [Cancel/Done](#) **Step 3**

[Add New ACCS Line](#)

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWValidated	Unique Account ID
14	1	2019	30-31-0002-00-00-00-00	02-21-16-001	28LEF29-P00	41-11-00-00	\$800.00	N	Yes	---

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

Federal Share: * \$500,000.00

Affected Reference Number: NA16NMF4130006

To: *
TEST ORG INC.
123 Germantown Road Germantown, MD
20876

Requisition Number: *

EIN: 987654321 **DUNS:** 123456789

Description: *
CFDA Number: 11.413
Project Start Date: 2015-10-01
Project End Date: 2019-09-30
Grant Type: not entered
Project Description: Training App 1

Automatically filled in after Authorizing Official and Requestor have been selected

Accounting - ACCS Lines *

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWValidated	Unique Account ID	Action
14	1	2019	30-31-0002-00-00-00-00	02-21-16-001	28LEF29-P00	41-11-00-00	\$800.00	N	Yes	DMAC-X-999-001	Edit Delete

[Add New ACCS Line](#)

PRCF Total for this Award action: \$800.00

Total Federal funds authorized for this Award action: \$800.00

- Next, click the **Procurement Request** task from the Inbox and then choose **Complete Procurement Request and Commitment of Funds** from the Action dropdown menu. Note that this Procurement Request is only for the first year of funding. We will discuss how to fund the out-years during the Post Award class.
- Fill in Authorizing Official (Internal Reviewer) and Requestor (During class each student should use his/her own training ID (e.g., gstudent01)). Click the **Save** button.
- Now the Requisition Number and Ship To boxes have been populated by the system. Notice the data in the Description box. If the Procurement Request is completed before the PO Checklist, the Grant Type (Grant or Cooperative Agreement) is not available to be filled in. If necessary, this field can be manually updated.

FY 2015 UPDATE

- The Department of Treasury's Bureau of Fiscal Services mandated changes that impact how some NOAA awards are processed by Automated Standard Application for Payments (ASAP). Prior to FY 2015, all NOAA Awards were processed as *Regular Accounts*. Going forward (starting with FY 2015) new NOAA awards, except Cooperative Initiative (CI) awards, will be processed as *Control Detail Accounts*.
- For a detailed discussion of the conventions and rules associated with *Control Detail Accounts*, please refer to the Training Manual reference: http://www.corporateservices.noaa.gov/grantsonline/Documents/ASAP_FPO.pdf
- The essential data entry requirements for the two award types, and the corresponding ACCS Lines, will be discussed at a high level.

Regular Accounts

- When a recipient logs into ASAP to draw down funds from a Regular Account award, s/he requests an amount that will be deducted from the total balance of the award's authorized funds. When entering the ACCS Lines for this type of award, standard procedures will apply.

Control Detail Accounts

- Each Control Detail Account award has an authorized total award funding amount. The total award funding amount is divided into smaller sub-units, each of which is associated with a Unique Account ID. When requesting payments from the award account, the recipient must specify one or more Unique Account IDs and the draw down amount for each Unique Account ID. When entering the ACCS Lines for a Control Detail account, additional requirements apply.
- To facilitate the use of Unique Account Descriptors, a new Grants Online role has been created – the Lead Budget Officer. The person in this role is responsible for maintaining all *Unique Account Descriptor codes* in the Grants Online system for a particular Line Office.

ACCS Lines (Regular Accounts)

- The user must supply data for the ACCS Lines. To complete this task, click the **Add New ACCS Lines** link. The "Fiscal Year" defaults to the current fiscal year but can be changed by any user who has the right to edit the contents of this screen. The "Prior Year Fund" indicator is automatically set by the system based on the data in the "Fiscal Year" field.

ACCS Lines (Control Detail Accounts)

- To supply data for Control Detail Accounts ACCS Lines, click the **Add New ACCS Lines** link. As for the Regular Accounts, the “Fiscal Year” defaults to the current fiscal year but can be changed by any user who has the right to edit the contents of this screen. The “Prior Year Fund” indicator is automatically set by the system based on the data in the “Fiscal Year” field.
- In addition to the usual information, a Unique Account Descriptor and a Fund Type must be entered.
 - When data for Project, Task, Organization, Object Class, and Amount is entered; Fund Type is populated based upon the Project and Task.
 - Click the **Save** button.
 - The new ACCS Line displays at the bottom of the screen.

NOTE: The Data Warehouse (DW) Validation is an optional step for the Federal Program Officer or Program Office staff user. That step is not a prerequisite to add the Account Descriptor. However, DWValidate must be completed before the Budget Officer can approve the Procurement Request.

- Click the **Select Descriptor** link to specify the Unique Account Descriptor.
- Based upon the line office, a list of the available Unique Account Descriptor is visible.
- To filter by a Program Office, choose the appropriate Program Office from the dropdown list and click the **Apply Filter** button.
- Click the **Select** link next to the Unique Account Descriptor to complete the ACCS Line information that should be added to the Procurement Request.

- **After entering the ACCS information.**
 - Click the **Save** button.
 - Click the **DWValidate** button to validate the data against the CBS Data Warehouse tables. If the validation is successful, the Program Code is populated.
 - When the user enters a valid ACCS Line, the words *“The ACCS is Valid”* displays at the top of the “Accounting – ACCS Line” section of the screen. In addition, the word *“True”* displays next to the Validated field.
 - Click the **Cancel/Done** button to return to the previous screen.
 - Continue to process and forward the Procurement Request as usual.

- **A validated ACCS Line for a Regular Account:**

The ACCS is valid
Validated: true

Bureau (xx): * 14
Fund (xx): * 7
Fiscal Year (yyyy): * 2014
Project - Task: * 4RM2APA - P00
Program Code: 04 - 04 - 01 - 005
Organization: * 20 - 01 - 0000 - 00 - 00 - 00 - 00
Object Class: * 41 - 11 - 00 - 00
Amount: * \$1,250.00 Prior Year Fund: No

Save DWValidate Cancel/Done

Add New ACCS Line

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWValidated
14	7	2014	20-01-0000-00-00-00	04-04-01-005	4RM2APA-P00	41-11-00-00	\$1,250.00 N		Yes

- **A validated ACCS Line for a Control Detail Account (includes Unique Account Descriptor):**

The ACCS is valid
Validated: true

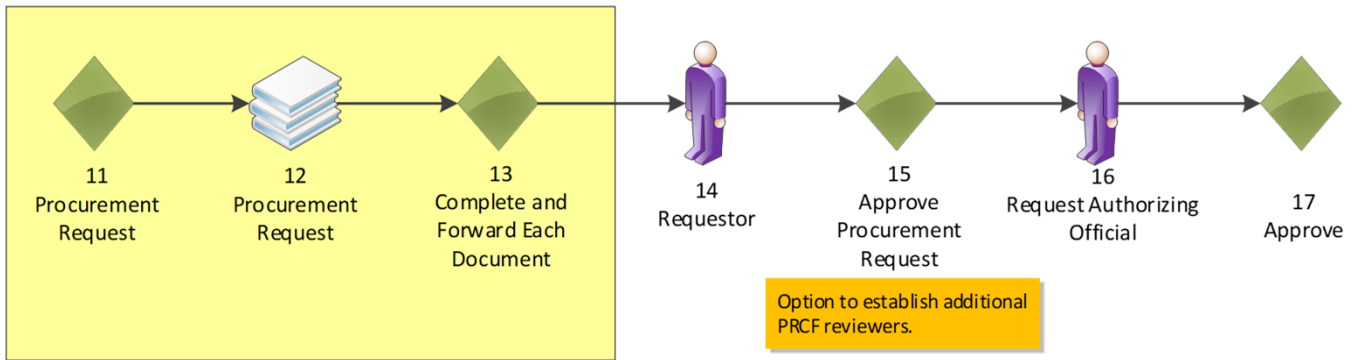
Bureau (xx): * 14
Fund (xx): * 1
Fiscal Year (yyyy): * 2015
Project - Task: * 28LEF29 - P00
Program Code: 02 - 21 - 16 - 001
Organization: * 30 - 31 - 0002 - 00 - 00 - 00 - 00
Object Class: * 41 - 11 - 00 - 00
Unique Account Descriptor: NEW DESCRIPTOR [Select Descriptor](#) Fund Type: X
Amount: * \$250.00 Prior Year Fund: No

Save DWValidate Cancel/Done

Add New ACCS Line

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWValidated	Unique Account Code
14	1	2015	30-31-0002-00-00-00	02-21-16-001	28LEF29-P00	41-11-00-00	\$250.00 N		Yes	NEW DESCRIPTOR-X-999-001



Accounting - ACCS Lines *
 No CD435 ACCS Lines have been defined.
[Add New ACCS Line](#)
 PRCF Total for this Award action: \$0.00
 Total Federal funds authorized for this Award action: \$5,000.00

[Procurement Request Official Comments](#)

Save **Save and Return to Main** **CBSValidate** **Cancel**

There is a "Validate" button on the main Procurement Request screen to do an edit check against the main CBS database. This cannot be used until after the ACCS line(s) have been added.

CBS Result

Vendor Validation ; SI.No 1; VendNo 90600;VendId 1;Tin 205533272;Duns 602201043;Active Y;
 Item_No 001; Line_No 1; CD435_ACCS_ID 2025511;
Error - Org4 0; Invalid or inactive Org 4 Code;
 Item_No 001; Line_No 1; CD435_ACCS_ID 2025511;
 Error - Can not find the mask in FM001 -13-14-SAE0000-10-01-0005-00-00-00-00-0041-11-00-00;

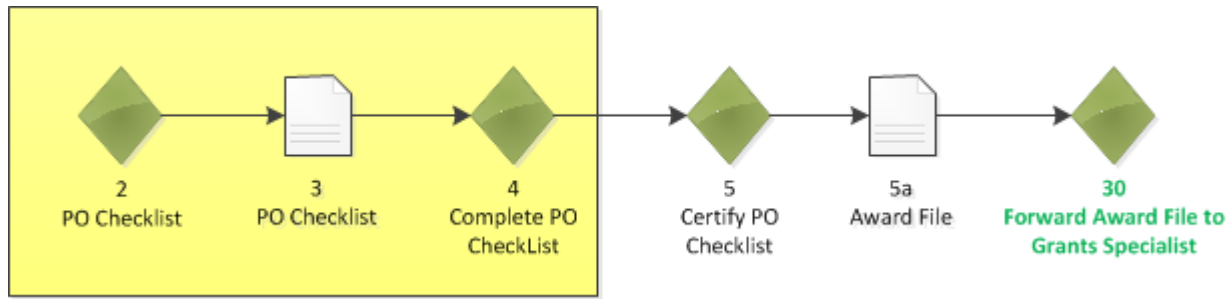
Cancel

If there is a problem with the edit check against CBS the system will display a separate page showing a message from the CBS system. If the CBS Result message is difficult to understand, contact the Grants Online Help Desk for assistance. In this example one component of the org code is incorrect.

- The CBS validation feature applies only to Interfaced Awards. Currently, NOAA is the only Bureau with Interfaced Awards.
- There is a CBSValidate button on the main Procurement Request screen. After entering the ACCS line(s), this button can be used to check for sufficient funds. The CBSValidate process also validates each component of the ACCS line and ensures the organization has been linked to a valid vendor in CBS. The results of the CBS validation process are displayed at the top of the Procurement Request screen. If any edits checks are not passed, a CBS error message indicates the cause of the validation failure.

NOTE: CBS validation is only required for the Budget Officer. The functionality, however, is also available to the FPO and Requestor.

- The amount of the “PRCF Total for this Award Action” must be equal to or less than the amount in “Total Federal Funds Authorized For This Award Action.”
- Click **Save and Return to Main** to prepare to start the workflow. The user is returned to the Procurement Request launch page.
- From the Action dropdown menu choose **Forward Procurement Request to Requestor** to begin workflow. Since the user has selected himself/herself as the Requestor s/he will have a new task in his/her Inbox to “Review the Procurement Request.”
- Navigate to the Inbox, click the **Tasks** link and select that task. Choose **Approve Procurement Request** from the dropdown menu.



PO Checklist - NA17GOT9980020

Attachments:

No attachments.

Add new Attachment: [\[+\]](#)

Any changes to information on this page should be saved before adding or removing attachments. [Fill Large File Guidance](#)

General Award Information

Application Organization: [ATLANTIC STATES MARINE FISHERIES COMMISSION](#) State: VA
 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 (as can occur with copy/paste from Word).

Basis of Selection * [Guidance](#)

- Competitive
- Non-Competitive
- Congressionally Directed (Soft Earmark)
- Institutional (designated by Grants Office)
- Formula/Allotment
- Congressionally Mandated (Hard Earmark)

Project Progress Reports [Guidance](#)

Any changes to these values will be applied to the entire grant.

Frequency

- Semi-Annually
- Synchronized to the Federal Financial Report periods
- Annually (for multi-year/institutional)
- Quarterly
- Not Required (for "No Specific Purpose" awards). No final report required. Final report selected by the Grants Office.
- Not Required (for Single Year awards). One report, covers award period up to 12 months after the end of the award period.

Final Report

- Comprehensive - a last interim report is required
- Comprehensive - a last interim report is not required
- Last Report

[Special Award Condition for Project Progress Reports](#)

Project Progress Reporting Comments:

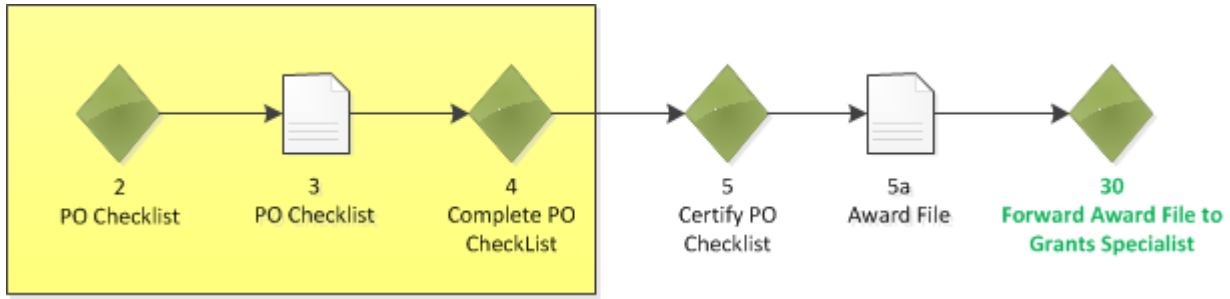
Note: It is the Program Officer's responsibility to create the Special Award Condition for non-duplicative awards in favor of the Special Award Condition. If no Special Award Condition exists for project progress reports, the Bureau (or Department) Standard Administrative Award Conditions apply.

Conflict of Interest/Post Employment Restrictions [Guidance](#)

Is there a former DOC employee working for the applicant who represented or will represent the applicant in the award and/or selection process?

- NO YES

If YES, please attach files below.



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

Project Specific Information [Guidance](#)

Is PROGRAM INCOME anticipated being earned during performance of this project? NO YES [Enter Comments](#)
 Will a VIDEO be created for public viewing as part of this project? NO YES [Enter Comments](#)
 Is a SURVEY/QUESTIONNAIRE required by the Program Office for this project? NO YES [Enter Comments](#)
 Will Federal Agency owned equipment be provided to the recipient to use for this award? NO YES [Special Award](#)

Transfer Information [Guidance](#)
 Does this award include any Federal funds that were transferred from another Federal agency specifically for this award? NO YES
 If YES, enter transfer documents [Enter Comments](#)

Programmatic Special Award Condition
 Are there any NEPA mitigating factors, Post Award NEPA reviews, or any other programmatic restrictions that need to be placed on the award? NO YES
[Special Award Condition](#)

Additional Information

NOAA Specific Information

Coastal Zone Management Awards
 For Coastal Zone Management Awards, indicate which sections of the Coastal Zone Management Act this award adds.
 Section 306/306a NO YES
 Section 308 NO YES
 Section 309 NO YES
 Section 310 NO YES
 Section 6217 NO YES
 If no boxes are checked, only the normal Financial Reports will be generated. Every appropriate Section must be checked. Section 306 reports are still required through the time span of the award. Amendment 1 only has Section 308 tasks, but Section 306 reports are still required through the time span of the award.

CESU Awards
 Is CESU Award? NO YES If YES, enter justification and verify Grant Type [Guidance](#)
 Justification
 [Spell Check](#)

Other
 Past Performance Acceptable? NO YES Not Answered
 Comments
 [Spell Check](#)

Is this a Cooperative Institute applying for a non-CI competitive award? NO YES

[Cooperative Agreement Special Award Condition](#)

[Save](#) [Save and Return to Main](#) [Cancel](#)

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.

Forward/Revise Award File

- Once the PO Checklist has been completed and certified, the system will generate the Forward/Revise Award File task, which will enable the Project Officer to move the file from the “Program Office” side of Grants Online to the “Grants Specialist” side of Grants Online in order to continue processing.
- Note that while the task will be generated once the PO Checklist is certified, the Project Officer will not generally be able to move the file forward to the Grants Specialists tasks, until *all* of the Program tasks (the PO Checklist, the Procurement Request and Commitment of Funds, and the NEPA Checklist), have been completed and approved. A large red “X” will show on the Award File in Progress page, along with a table of outstanding tasks, until all outstanding tasks are completed.
- Under special circumstances, a Program Officer may submit the award file to GMD for review before the Procurement Request is completed. In order for this option to be available, the PO Checklist must be certified and the NEPA must be approved by the NEPA Official. The Program Officer will see the option to “Forward Award File to Grants Specialist without PRCF.”

Award File In Progress - NA19GOT9980052

Id: 2705755
Status: ProgramOfficerActions - Not Started

Action: Please select an action Submit

Your Comments: Please select an action

Forward Award File to Grants Specialist without PRCF

Reassign Award File

Renegotiate

Revise NEPA Document

Revise PO Checklist

View FAIS Sheet

View Reporting Frequencies

Print Award File History

Attachments:

Pending Actions X

One item found.1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status	Last Action Date	Last Action User
Procurement Request and Commitment of Funds	2705756	07/10/2019		2019	Procurement Request and Commitment of Funds: Not Started		Grants Student02

- In this circumstance, the PRCF may be completed at any point in time. Once the PRCF has been completed, then the award file can be sent to the Grants Officer for review and continue in the workflow.

Forward/Revise Award File (cont.)

Award File In Progress - NA19GOT9980052

Id: 2705755
Status: ProgramOfficerActions - In Progress


Action:

Your Comments:

- Forward Award File to Grants Specialist
- Forward Award File to Grants Specialist and Ignore Warnings
- Reassign Award File
- Renegotiate
- Revise NEPA Document
- Revise PO Checklist
- Revise Procurement Request and Commitment of Funds
- View FAIS Sheet
- View Reporting Frequencies

▶ **Workflow History**

📁 **Attachments:**

Pending Actions 

Nothing found to display.

- After all the required tasks are completed, the red “X” shown on the previous page will change to a green checkmark, signifying that the file is ready to move to the Grants Specialist workflow.
- Should any of the Program tasks need to be modified, the “Forward/Revise Award File” task will enable the user to “revise” any of the Program documents, or “Renegotiate,” if elements of the SF-424 page need to be corrected. If the Project Officer chooses to modify a document, it will need to move through the entire workflow/approval process, before the file can move forward to the Grants Specialist workflow.
- Once all of the program tasks have been completed, the Project Officer should choose “Forward Award File to Grants Specialist” option. Note that this will automatically forward the file to the “Lead Grants Specialist” for that line office/CFDA number combination.
- **EDA Only:** If the EDA Project Officer needs to complete the Grants Specialist tasks, but is not the “Lead Grants Specialist,” the Grants Specialist task to “Review Award File,” will need to be reassigned back to the EDA Project Officer.

Grants Management Process

GMD Review, Obligation, Approval and Award Offer (GMD-1)

February 25, 2019

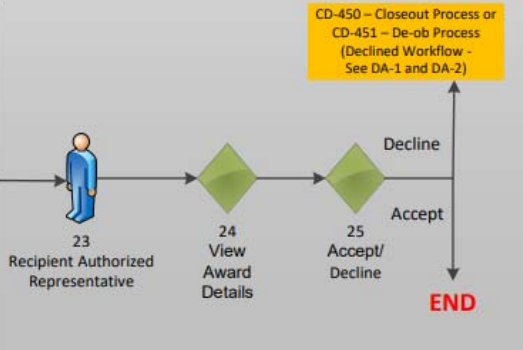
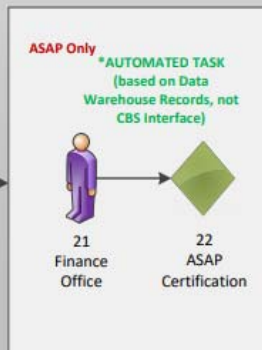
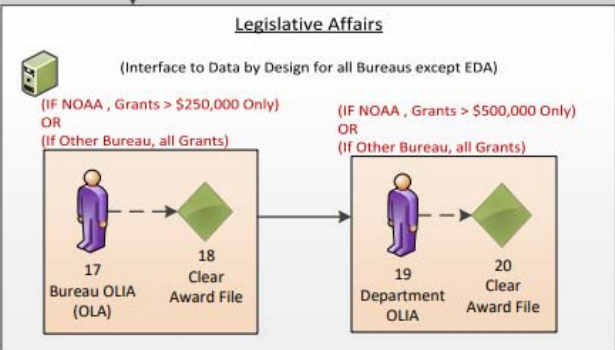
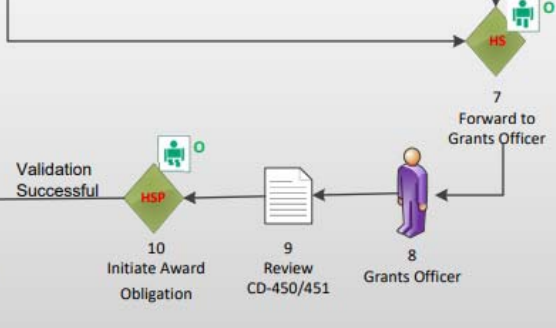
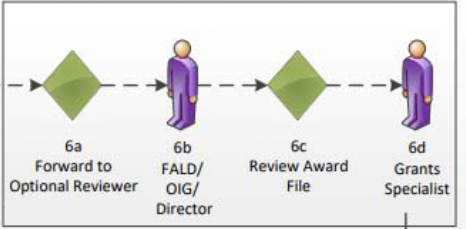
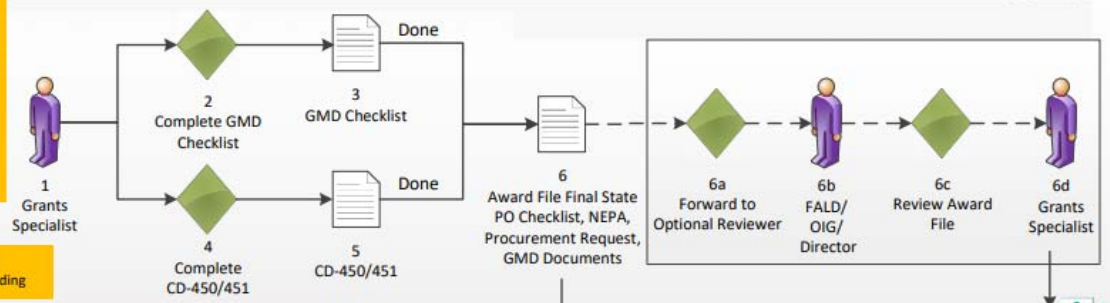
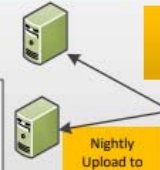
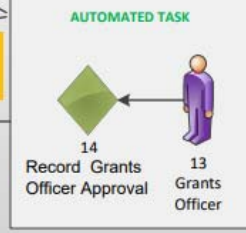
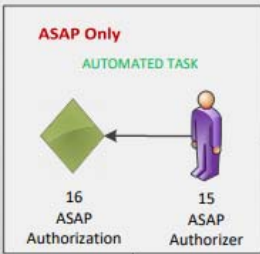
Version 4.26

"Review Award File" Task is placed into Grants Specialist's Inbox when FPO forwards Award File. A task also goes to Public Affairs (based on the Bureau Threshold*) to attach Press Release. (Canceled if no action taken as of GO approval -Step 10.)

*Bureau Threshold:
 (IF EDA, all Grants) / (IF Census, no Grants)
 OR
 (IF Other Bureau > \$500,000 Only)

Nightly Upload to CBS DW for ARRA
 File generation for FAADS/USASpending

Award Files cannot be signed by Grants Officer if there is a pending amendment.



CD-450 - Closeout Process or CD-451 - De-ob Process (Declined Workflow - See DA-1 and DA-2)

Please note: The FPO should communicate to the Recipient that the Decline Award process should not be used if an update is needed.

- When the Award File has been forwarded to Grants Management there are several additional steps that take place before the award offer is sent to the recipient. The Grants Management workflow steps for processing a Competitive application package are exactly the same as for the Universal application package with the exception of the Grants Management review and approval process.
- If funds have been removed from the ASAP account(s) used on the Procurement Request after the Award File was sent to Grants Management, the Grants Officer will not be able to approve the award and will return it to the Program Office to remedy the situation.
- If the recipient organization record attached to the application is not marked as ASAP, the ASAP portion of the workflow will be skipped. The recipient will have to use an Organization Profile Change Request to initiate the ASAP enrollment after the award has been accepted. This process must occur when the Non-ASAP record rather than the ASAP record for an organization is accidentally associated with an application.
- For non-NOAA bureaus (except EDA) using Grants Online, all awards are routed to WebDocFlow for OLIA clearance, irrespective of award amount. In addition, this rule applies to awards that require bureau-level OLA clearance. For NOAA, the determining factor for WebDocFlow routing is the award amount. For EDA, the OLIA and OLA tasks are manually cleared.

Federal Program Officer Training Agenda

Day 2

Post Award Processing & Reporting
Introduction and Agenda
Hands-On Participation – Complete Award Package Processing from Day 1
Hands-On Participation – Grants Management Processes
Hands-On Participation – Recipient Award Acceptance / Manage Users
Hands-On Participation – Award Action Requests
Hands-On Participation – Progress Reports / Financial Reports (Demo Only)
Hands-On Participation – Partial Funding (Release of Funds)
Demo Only – Additional Post Award Actions <ul style="list-style-type: none">– Award Tracking Report– Organization Profile Changes (SAM.gov)
Hands-On Participation – Supplementary Information
Hands-On Participation – Correspondence and Federal Reports
Wrap Up: <ul style="list-style-type: none">Additional Resources and TrainingQuestions/Concerns & Answers

OBJECTIVES – By the end of the day, students should:

- Understand the Recipient Award Acceptance process
- Understand the use of an Award Action Request
- Review an Award Action Request
- Review, route and accept a Performance Progress Report
- Locate and view a Federal Financial Report
- Understand the use of a Partial Funding Action
- Initiate and route a Partial Funding Action
- Understand additional Post Award Processes
- Know where to find help when needed

TRAINING MATERIALS:

1. Agenda and Objectives
2. Process Maps and Screen Shots – Grants Management
3. Process Maps and Screen Shots – AAR Workflow
4. Process Maps and Screen Shots – Performance Progress and Federal Financial Reports
5. Process Map and Screen Shots – Post Award Processes
6. Course Evaluation



Grants Online Training

Post Award Processing

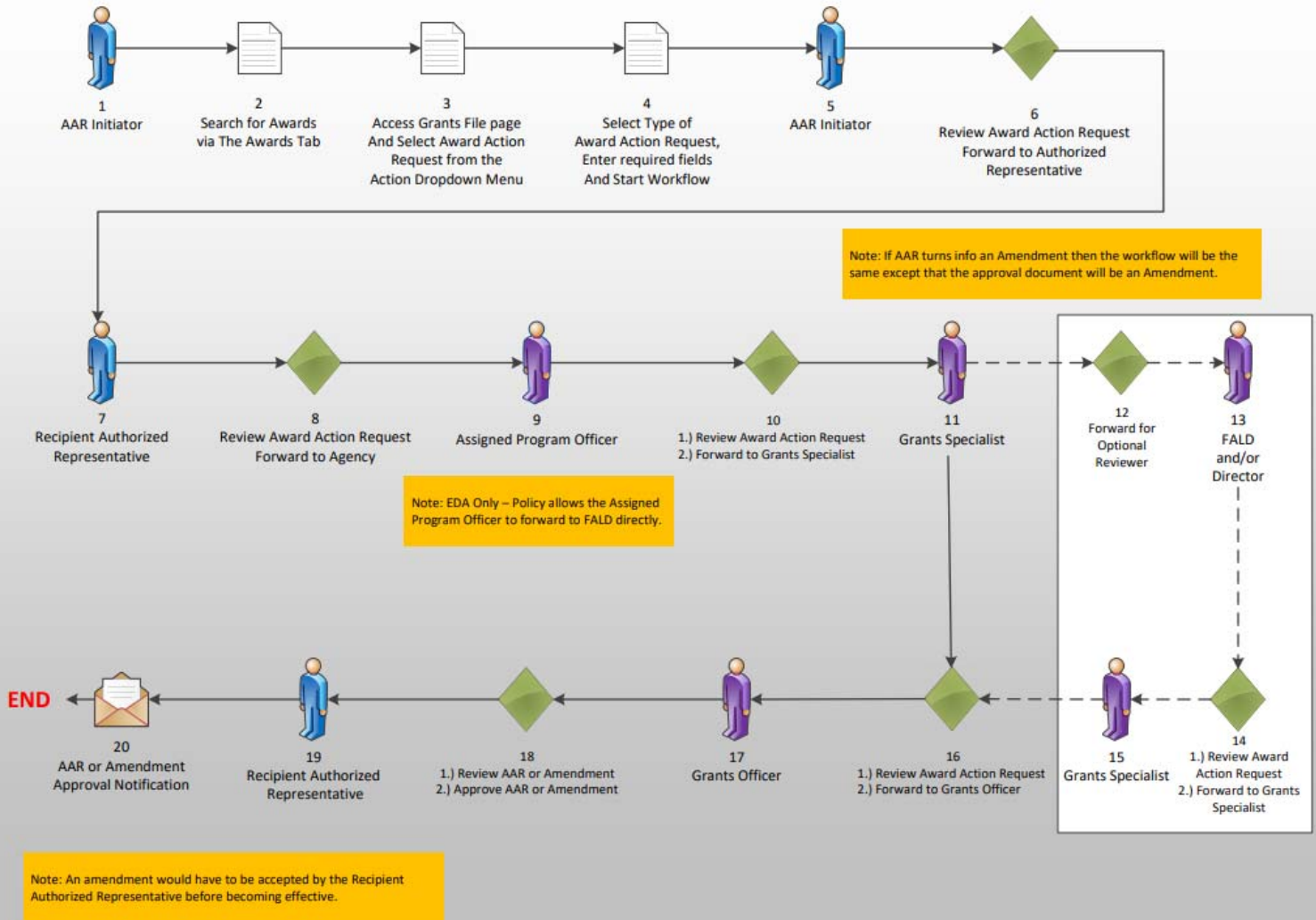
August 2019

Award Action Request (AAR)

Award Action Request Workflow (AAR-1)

October 9, 2018

Version 4.25



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	No Cost Extension – Prior Approval Waived (Research Terms and Conditions)
Extension to Close Out	*Change in Scope
Change in Principal Investigator/ Project Director	Foreign Air Carrier for Travel
Change in Key Person Specified in the Application	Disengagement More Than 3 Months, or 25% Reduction by Project Director or PI
Satisfy Specific Conditions	Inclusion of Costs Requiring Prior Approval in Cost Principles
Transfer of Funds Budgeted for Participant Support Cost to Other Categories of Expense	*Subaward, Transfer or Contract Out Work Under the Award if Not Described in the Approved Application
Rebudget – Prior Approval Required	Re-budget – Prior Approval Waived (Research Terms and Conditions)
Pre-Award Costs More than 90 Days	*Termination by Consent
Submit Additional Closeout Documents	ASAP Drawdown Request
Other	

Reference: Award Action Request Guidance link:

http://www.corporateservices.noaa.gov/grantsonline/Documents/AAR_Assistance/Recipient_AAR_Help.htm

Performance Progress Report (PPR)

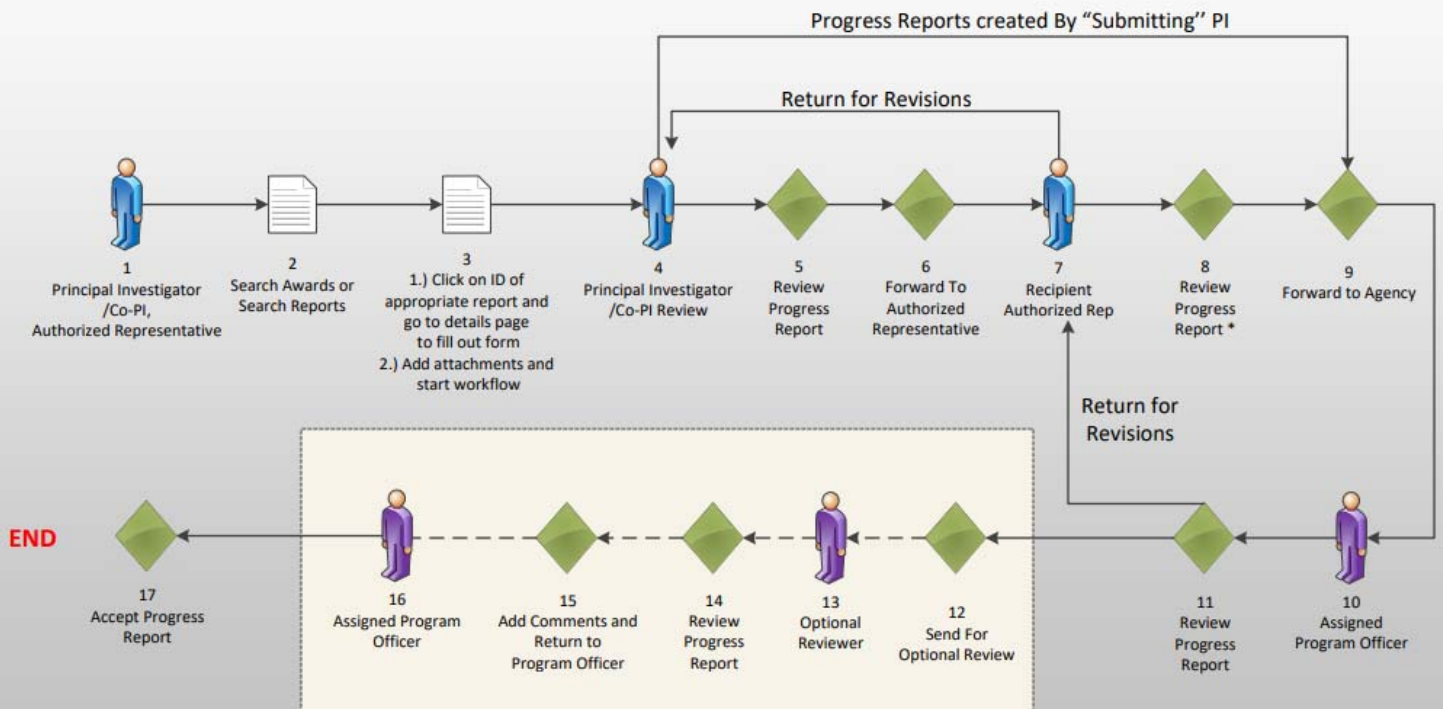
Routing of Performance Progress Report (PPR-1)

July 29, 2019

Version 4.28

The Research Performance Progress Report (RPPR) follows the same process flow. The only difference is that the RPPR does not allow Optional Reviewers at this time.

*Step 8 -All Auth Reps will get the task to Review Progress Report. Only one needs to act on it to Forward to Agency.



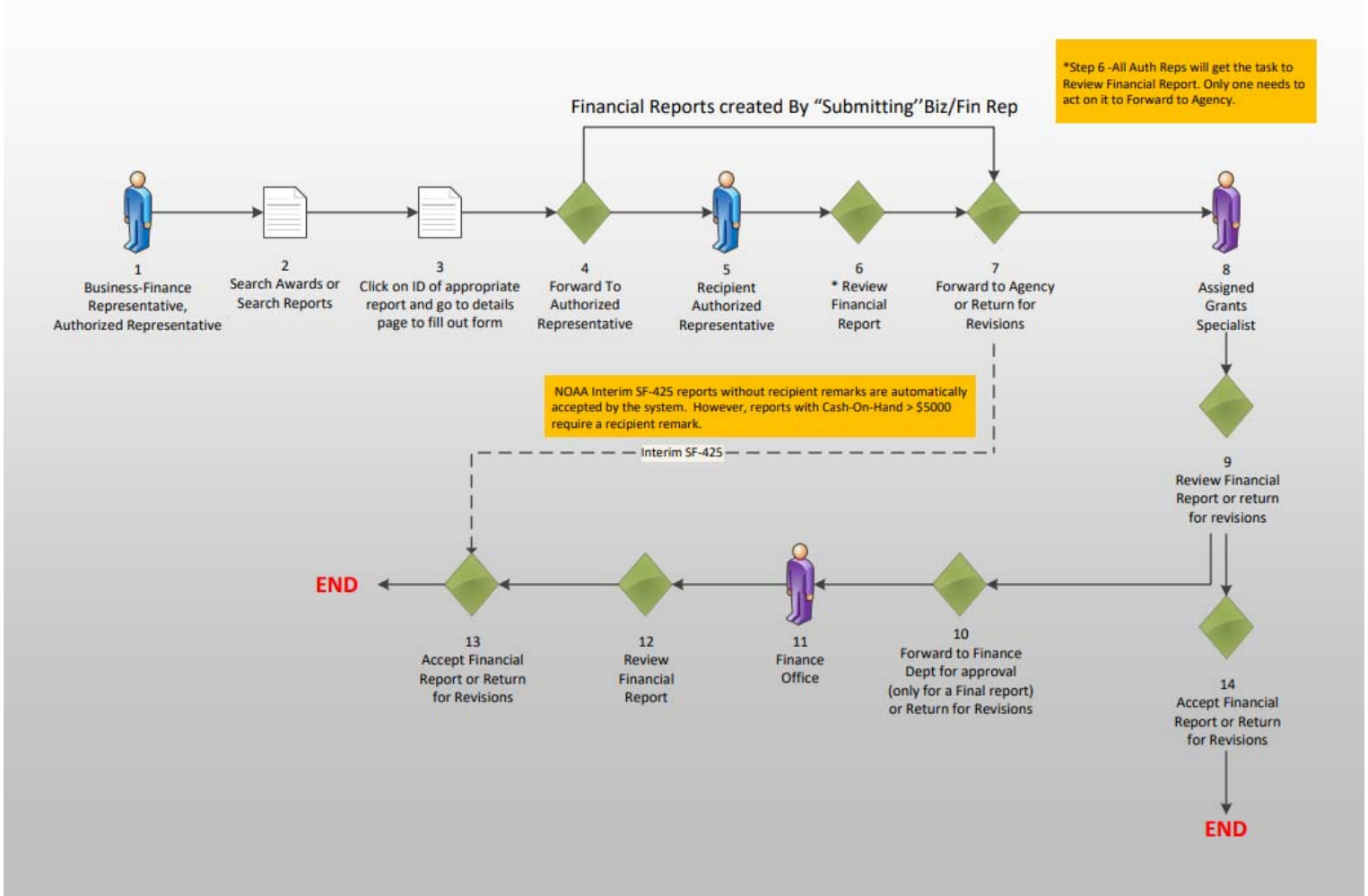
Federal Financial Report (FFR #1)

Routing of Federal Financial Reports (FFR-1)

July 29, 2019

Version 4.28

SF-425



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.

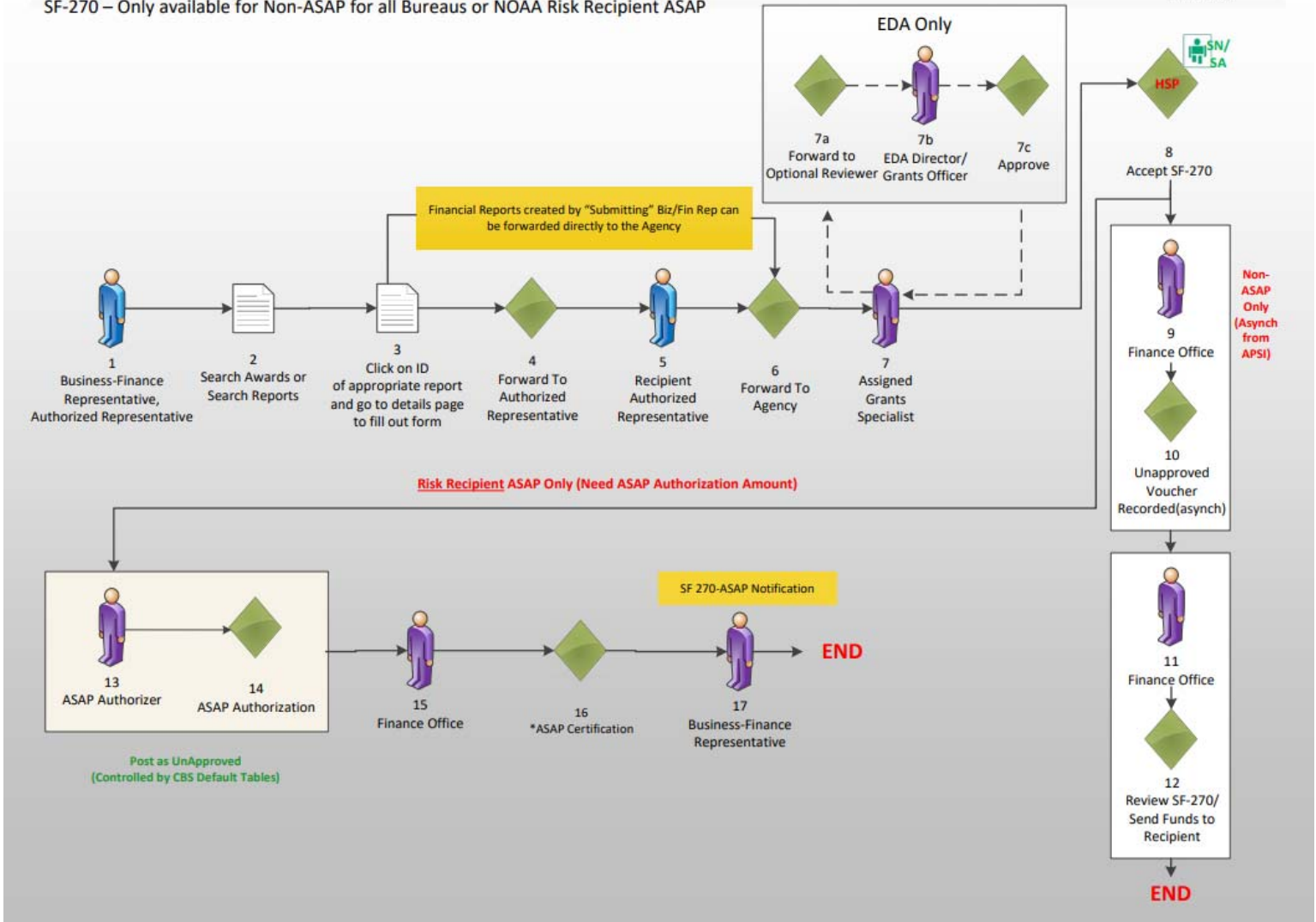
Federal Financial Report (FFR #2)

Routing of Federal Financial Reports (FFR-2)

July 29, 2019

Version 4.28

SF-270 – Only available for Non-ASAP for all Bureaus or NOAA Risk Recipient ASAP

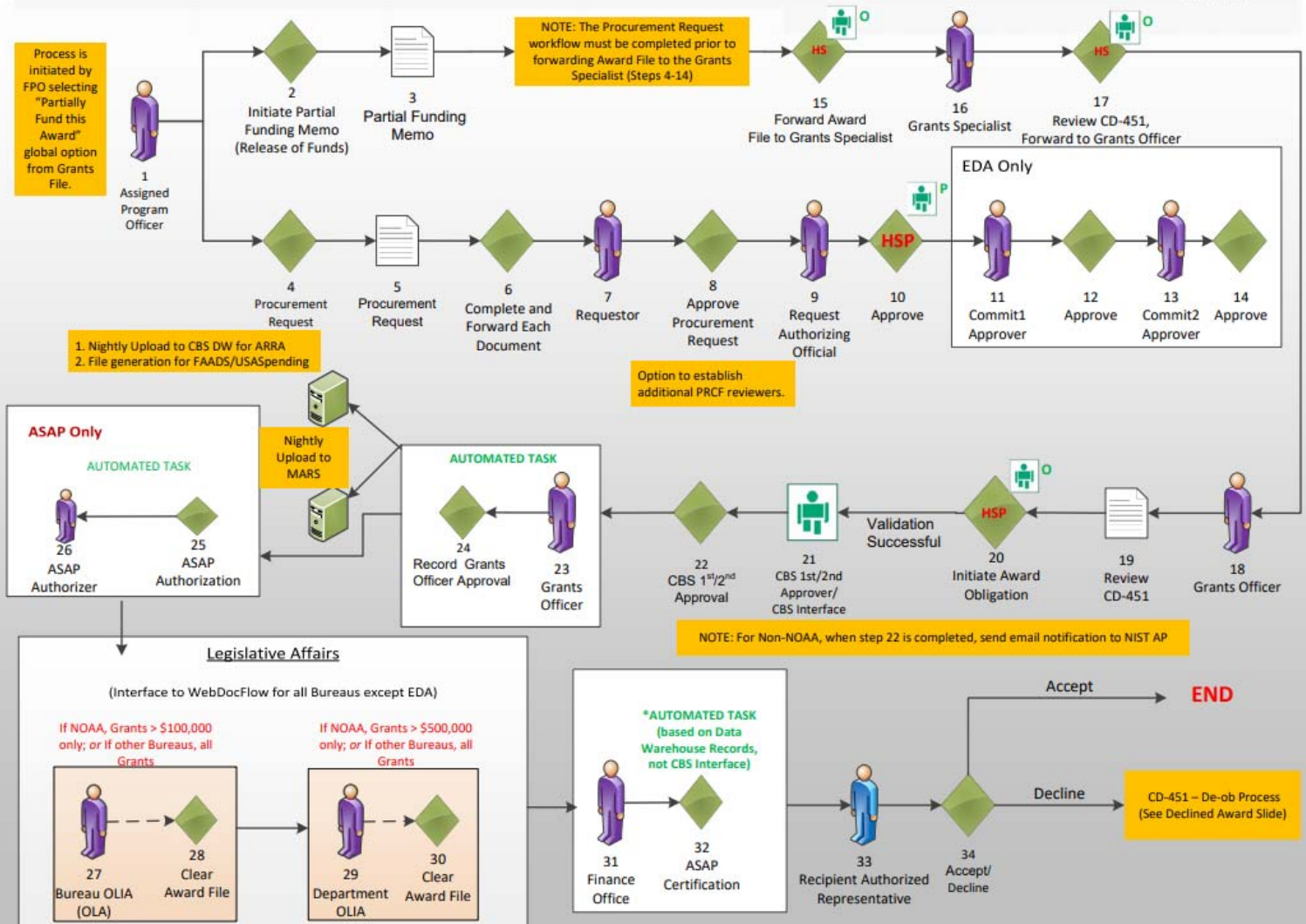


Partial Funding

Partial Funding Workflow (PR-1)

May 29, 2019

Version 4.27



FPO – Partial Funding Steps 1 – 3

1. While on the **Awards Tab**, click the **Search Awards** link. Enter information for one of the data elements on the page. Click the **Search** button.

Search Awards

Award Number:

Recipient Name:

Project Title:

Award Status:

PI-PD Last Name:

Supplementary Information Category:

Supplementary Value:

Please use the above fields to narrow down your search. Searches are not case-sensitive. Fields can be partially completed to get all matching results. Use % as wildcard in search string.

Search Results

31 items found, displaying all items.1

Award Number	Org ID	Recipient Name	Project Title	Award Status	Principal Investigators-Project Directors
NA16GOT9980018	2004695	GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION - NOAA	GSTUDENT03	Accepted	None Designated
NA16GOT9980016	2004695	GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION - NOAA	GSTUDENT-04 Application for Competition	Accepted	None Designated
NA16GOT9980034	2004695	GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION - NOAA	GSTUDENT15 - Instructor Comp App 2016	Accepted	None Designated
NA16GOT9980032	2004695	GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION - NOAA	Jim's Account	Accepted	None Designated

2. Under the Search Results, click the **Award Number** link associated with the Award that is to be partially funded.

3. While on the Grants File launch page select **Partially Fund this Award** from the Action dropdown list. Click the **Submit** button.

Grants File - NA16GOT9980034

Id: 2595286
Status: Accepted

Action:

Your Comments:

- Partially Fund this Award**
- Reduce Funding of this Award
- View Accounting Details
- View/Manage Award-related Personnel

FPO – Partial Funding Steps 4 and 5

Memo * [Guidance](#)

Approved Plan and Prior Obligations

Action	Application ID	Project Title
Select	2139113	TEST RECORD - Grants Online Training Application05

Selected Application

None

- Click the **plus (+)** beside the Action column header to obtain details associated with the application that will be partially funded.

Although all applications associated with an Award are visible; partial funding can be applied to **one** application at a time.

- Click the **Select** button to choose the desired application.

Approved Plan and Prior Obligations

Action	Application ID	Project Title
Select	2139113	TEST RECORD - Grants Online Training Application05

Planned Year	Approved Fed Share	Obligated	Approved Non-Fed Share	Assigned Non-Fed Share
2009	\$125,000.00	\$125,000.00	\$0.00	\$0.00
2010	\$125,000.00	\$0.00	\$0.00	\$0.00
2011	\$250,000.00	\$0.00	\$0.00	\$0.00

FPO – Partial Funding Step 6

SF-425 Frequency:	Interim Reports Not Required - Not ASAP - Use SF-270 - Final Full Report Required	Progress Report Frequency:	Annually	Final Progress Report:	Comprehensive - a last interim report is not required
Final Reports Due On:	12/29/2017	Project Title:	GSTUDENT15 - Instructor Comp App 2016		
PIs - PDs:	None Designated	Closeout Date:	N/A		

Partial Funding -- NA16GOT9980034

Memo * [Guidance](#)

[Spell Check](#)

Grants Online Partial Funding Guidance

Partial Funding Memo

The Partial Funding Memo is used to explain the state of funding for the approved Application. A clear and precise explanation of what is happening in this Partial Funding will greatly assist GMD personnel in processing the action. Typically, Partial Funding actions are used to fund the out-years of multi-year awards, with a single application being submitted for the award's duration. However, some awards will have multiple multi-year applications associated with them. Other awards are single-year awards for which the fully approved amount was not provided in the initial award. Every situation requires an explanation.

GMD personnel want to know that the Program Officer is aware of the Recipient's reporting status for the award. GMD does NOT want to receive Partial Funding actions for awards for which the recipient is delinquent in reporting. It is GMD policy not to approve additional funding for awards that have delinquent reports.

Example 1 - The Standard Memo. Fully funding an out-year for a multi-year application, for which the initial funding was in the original award.

- Click the **Guidance** link for an example of the language that should be used for the Memo* data element. Six examples of the appropriate language are included on the next two slides.

Sample Language for Partial Funding Memo

- **Example 1 - The Standard Memo.** Fully funding an out-year for a multi-year application, for which the initial funding was in the original award.

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** - Partially funding an out-year for a multi-year application, for which the initial funding was in the original award, and for which an additional Partial Funding action is expected to take place later in the year to complete the year's approved funding.

This release of funds of \$_____ is for year __ of a __ year multi-year award. Due to _____, total funding for this award period is not available; additional funds will be provided at a later date. All required Progress and Financial reports have been submitted and accepted.

- **Example 3** - Partially funding an out-year for a multi-year application, for which the initial funding was in the original award, and for which an additional Partial Funding action is expected to take place the following year to complete this year's approved funding.

This release of funds of \$_____ is for year __ of a __ year multi-year award. 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 and Financial reports have been submitted and accepted.

Sample Language for Partial Funding Memo (*Continued*)

- **Example 4*** - Partially funding an out-year for a multi-year application, for which the initial funding was in the original award, and for which budgeted funds are not expected to be made available to fully fund the award.

This release of funds of \$_____ is for year __ of a __ year multi-year award. Due to _____, funding for this award period is not available. Additional funds will not be provided and this award will be reduced by _____. All required Progress and Financial reports have been submitted and accepted.

(Note: In this situation, work with the Grants Specialist to create an administrative amendment to reduce the total authorized award funding.)

- **Example 5** - Partially funding an out-year for a multi-year application, for which the initial funding was in the original award, and for which one or more Partial Funding actions have already occurred to fund the application for the current Fiscal Year.
- **This release of funds of \$_____ is for year __ of a __ year multi-year award. 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 and Financial reports have been submitted and accepted.**
- **Example 6**** - Partially funding an out-year for a multi-year application, for which the initial funding was **NOT** in the original award.
- **This release of funds of \$_____ is for year __ of a __ year multi-year application which was originally funded as Amendment _____. ... additional explanation according to above examples.**

NOTES:

When no additional funds are available the Program Office must advise the Grants Officer. Subsequently, the Grants Officer creates an amendment to inform the recipient that no additional funds will be provided. The recipient has two options: continue work with existing funds or terminate the award.

** If Federal Funding is being reduced, the match should be reduced by a comparable amount.*

*** If the Partial Funding is on a continuation application, instead of the original Award, notate the appropriate amendment number in the Partial Funding Memo.*

FPO – Partial Funding Steps 7 – 9

7. Enter the Partial Funding amount for the Fed Add Amount* data element.

NOTE: If changes are made to the Federal Funding Amount, the Procurement Request and Commitment of Funds and the Review Release of Funds tasks must be updated. If appropriate, specify the amount for the Non-Fed Amount.

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

9. To acknowledge the intent to proceed with the workflow and that it is acceptable that a Procurement Request and Commitment of Funds and a Release of Funds task are added to the user’s Inbox. Click the **OK** button.

Partial Funding -- NA16GOT9980034

Memo * [Guidance](#)

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.

155 / 4000 [Spell Check](#)

Approved Plan and Prior Obligations

Action	Application ID	Project Title
Select	2595204	GSTUDENT15 - Instructor Comp App 2016

Selected Application

Application ID	Approved Fed Share	Remaining Fed Share	Pending Fed Share	Fed Add Amount *	Approved Non-Fed Share	Remaining Non-Fed Share	Pending Non-Fed Share	Non-Fed Amount	AMD No.	Project Title
2595204	\$10,000.00	\$0.00	\$0.00	2500.00	\$1,000.00	\$-500.00	\$0.00		0	GSTUDENT15 - Instructor Comp App 2016

Note: Federal Add Amount plus Pending Federal Share plus the sum of all prior obligations may be up to 5% greater than the Approved Federal Share. If exceeding the Approved Federal Share, enter a memo explaining the reason for the additional funds.

Note: Only one application may be funded per Partial Funding action.

[Save](#) [Save and Start Workflow](#) [Cancel](#)

grantsonlinetraining.rdc.noaa.gov says:

WARNING: Release of Funds and Procurement Request workflow tasks will be placed in your inbox.
Are you sure you wish to proceed?

Prevent this page from creating additional dialogs.

[OK](#) [Cancel](#)

FPO – Partial Funding Step 10 and 11

10. If the Federal Amount was modified, navigate to the Your Tasks screen. There should be two new tasks:

- (a) Procurement Request and Commitment of Funds
- (b) Review Release of Funds

The status for both tasks is **Not Started**. The Procurement Request should be completed prior to attempting to work on the Release of Funds task. The steps to complete the Procurement Request are the same as those used for a new Award and are not repeated here.

Your Tasks												
Document Type		Status										
All		Open		Apply Filter >>								
18 items found, displaying all items.1												
View	RFA Name	Task Id	Task Name	Task Received Date	Task Status	Document Type	Document Id	Start Date	Completed Date	Award Number	Applicant Name	Applicant State
View	Instructor Competitive RFA - Aug 2016 Class	4865811	Procurement Request and Commitment of Funds	03/03/2017	Not Started	Procurement Request and Commitment of Funds	2597800			NA16GOT9980034	GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION	VA
View	Instructor Competitive RFA - Aug 2016 Class	4865810	Review Release of Funds	03/03/2017	Not Started	Award File	2597799			NA16GOT9980034	GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION	VA
View	Yvette's Feb Training	4865807	Forward/Revise Award File	03/03/2017	Not Started	Award File	2597793			NA17GOT9980069	GLOBAL ENVIRONMENT AND	VA

11. When the ACCS Lines associated with the PRCF are complete, select **Forward Procurement Request to Requestor** from the Action dropdown menu on the PRCF launch page. Click the **Submit** button.

Procurement Request and Commitment of Funds - NA18GOT9980057

Id: 2694475
Status: ProgramOfficerActions - In Progress

Action: Forward Procurement Request to Requestor **Submit**

Your Comments:

Spell Check

FPO – Partial Funding Step 12 and 13

12. From the PRCF, click the **View** link for Review Release of Funds. Complete the action associated with that task.

Your Tasks

Document Type: Status: [Apply Filter >>](#)

18 items found, displaying all items. 1

View	RFA Name	Task Id	Task Name	Task Received Date	Task Status	Document Type	Document Id	Start Date	Completed Date	Award Number	Applicant Name	Applicant State
View	Instructor Competitive RFA - Aug 2016 Class	4865811	Procurement Request and Commitment of Funds	03/03/2017	Not Started	Procurement Request and Commitment of Funds	2597800			NA16GOT9980034	GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION	VA
View	Instructor Competitive RFA - Aug 2016 Class	4865810	Review Release of Funds	03/03/2017	Not Started	Award File	2597799			NA16GOT9980034	GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION	VA
View	Yvette's Feb Training	4865807	Forward/Revise Award File	03/03/2017	Not Started	Award File	2597793			NA17GOT9980069	GLOBAL ENVIRONMENT AND	VA

13. After the Procurement Request has been approved and there are no pending actions, the user can choose **Forward to Grants Specialist for Review**. If appropriate, a workflow comment can be included.

Award File In Progress - NA17GOT9980071

Id: 2597842
Status: ProgramOfficerActions - Not Started


Action: [Submit](#)

Your Comments:

- Please select an action
- Edit Special Award Conditions
- Forward to Grants Specialist for Review**
- Reassign Award File
- Revise Procurement Request and Commitment of Funds
- Send for Legal Review
- View Amendment Details
- View FAIS Sheet
- View Reporting Frequencies
- View/Edit Partial Funding Document
- Withdraw Release of Funds

[Print Award File History](#)

Attachments:

Pending Actions 

Nothing found to display.

NOTE: When the red X beside the Pending Actions is replaced with a green checkmark, the option to **Forward to Grants Specialist for Review** is available from the Action dropdown menu.

FPO – Partial Funding Step 13 (continued) and 14

NOTE: If the red **X** is visible, the pending task(s) must be completed before you can advance to the next step in the workflow.

Pending Actions **X**

One item found.1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status	Last Action Date	Last Action User
Procurement Request and Commitment of Funds	2597794	03/03/2017		2017	Procurement Request and Commitment of Funds: In Progress	03/03/2017	Grant Student25

- Do not make any modifications to the Amendment Details (**View Amendment Details**) task; this will be modified by the Grants Specialist.

If changes to the Partial Funding Memo or Funding Amounts are necessary select **View/Edit Partial Funding Document**.

Award File In Progress - NA17GOT9980071

Id: 2597842
Status: ProgramOfficerActions - Not Started

Action: **Submit**

Your Comments:

- Please select an action
- Edit Special Award Conditions
- Forward to Grants Specialist for Review**
- Reassign Award File
- Revise Procurement Request and Commitment of Funds
- Send for Legal Review
- View Amendment Details
- View FAIS Sheet
- View Reporting Frequencies
- View/Edit Partial Funding Document
- Withdraw Release of Funds

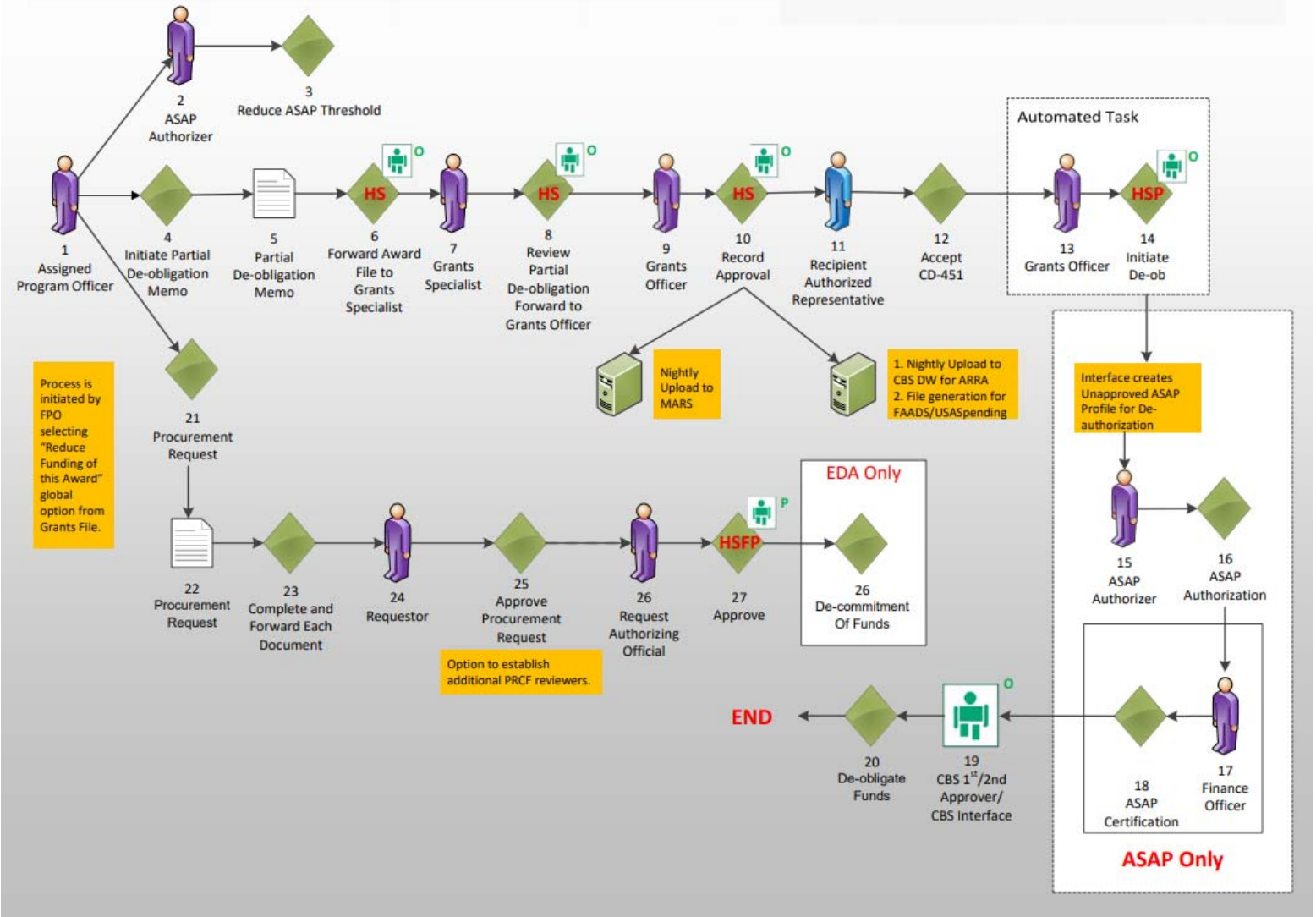
Print Award File History

Reduce Funding

Reduce Funding Workflow (PR-2)

May 29, 2019

Version 4.27



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.

Grants File - NA16GOT9980034

Id: 2595286
Status: Accepted

Action: **Submit**

Your Comments:

 Spell Check

Save Comment

The Reduction in Funding memo screen is also similar to a Partial Funding action.

Reduce Funding -- NA16GOT9980034

Memo * [Guidance](#)

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

143 / 4000 **Spell Check**

Approved Plan and Prior Obligations

Action	Application ID	Project Title
Select	2595204	GSTUDENT15 - Instructor Comp App 2016

Planned Year	Approved Fed Share	Obligated	Approved Non-Fed Share	Assigned Non-Fed Share
2016	\$5,000.00	\$10,000.00	\$500.00	\$1,500.00
2017	\$5,000.00	\$0.00	\$500.00	\$0.00

Selected Application

Application ID	Approved Fed Share	Remaining Fed Share	Pending Fed Share	Fed Deduct Amount	Approved Non-Fed Share	Remaining Non-Fed Share	Pending Non-Fed Share	Non-Fed Deduct Amount	AMD No.	Project Title
2595204	\$10,000.00	\$0.00	\$2,500.00		\$1,000.00	\$-500.00	\$0.00		0	GSTUDENT15 - Instru 2016

Note: Funding may be reduced for only one application per Reduce Funding action.

Save **Save and Start Workflow** **Cancel**

On the Reduce Funding Memo only the "Fed Deduct Amount" and "Non-Fed Deduct Amount" are available for data entry. Although positive numbers should be entered into these fields, the amounts will be deducted from the Award.

Your Tasks

Document Type: Status: [Apply Filter >>](#)

12 items found, displaying all items.1

View	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date	Completed Date	Award Number
View	4866942	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2598028			NA16GOT9980034
View	4866941	Reduce Funding Amendment	Not Started	Award File	2598027			NA16GOT9980034

Procurement Request and Commitment of Funds - NA16GOT9980034

Last CBS Validation: 04/26/2017 12:29:6 PM Status: Invalid

Active Procurement Requests:

Nothing found to display.

Withdrawn Procurement Requests:

Nothing found to display.

Request Authorizing Official: *

Name	Title	Telephone	Action
NOAA Official		301-444-1212	Change

Additional Reviewers:

Nothing found to display.

[Add](#)

(Please note, you must press 'Save and Return to Main' for the Route to be committed)

Requestor: *

Name	Title	Telephone	Action
Grant Student25		301-444-2715	Change

Federal Share: *

\$ -500.00

Requisition Number: *

NAG0000700159

Affected Reference Number: NA16GOT9980034

EIN: 541489434

DUNS: 878128073

To: *

GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION - NOAA
2900 S QUINCY ST STE 375 ARLINGTON, VA
22206-2231

Description: *

CFDA Number: 11.998
Project Start Date: 2015-10-01
Project End Date: 2017-09-30
Grant Type: Grant
Project Description: GSTUDENT15 -

Clearances/Remarks:

Accounting - ACCS Lines *

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWValidated	Unique Account ID
14	1	2016	30 -31 -0002-00-00-00-00	02-21-16-001	28LEF29-P00	41-11-00-00	(\$500.00)	N	Yes	TRAINING ACCS2-X-999-001

Select ACCS Line

PRCF Total for this Award action: \$-500.00

Total Federal funds authorized for this Award action: \$-500.00

[Procurement Request Official Comments](#)

[Save](#) [Save and Return to Main](#) [CBSValidate](#) [Cancel](#)

[Award Finance Report](#) [Award Document Report](#)

The CD-435 Report is replaced by the Award Finance Report.

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: FUNDING REDUCTION
De-obligation Request for Award: NA16GOT9980034

Total Federal Funding (entire award): \$10,000.00
Recipient Name: GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION - NOAA
EIN: 541489434
DUNS: 878128073
ASAP ID (if applicable):
Award Period: 10/01/2015 - 09/30/2017
Federal Program Officer: Grant Student00
Obligation Number: (Available only for Interfaced Awards) 674706
Requested De-obligation Amount: \$500

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		(\$500)

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

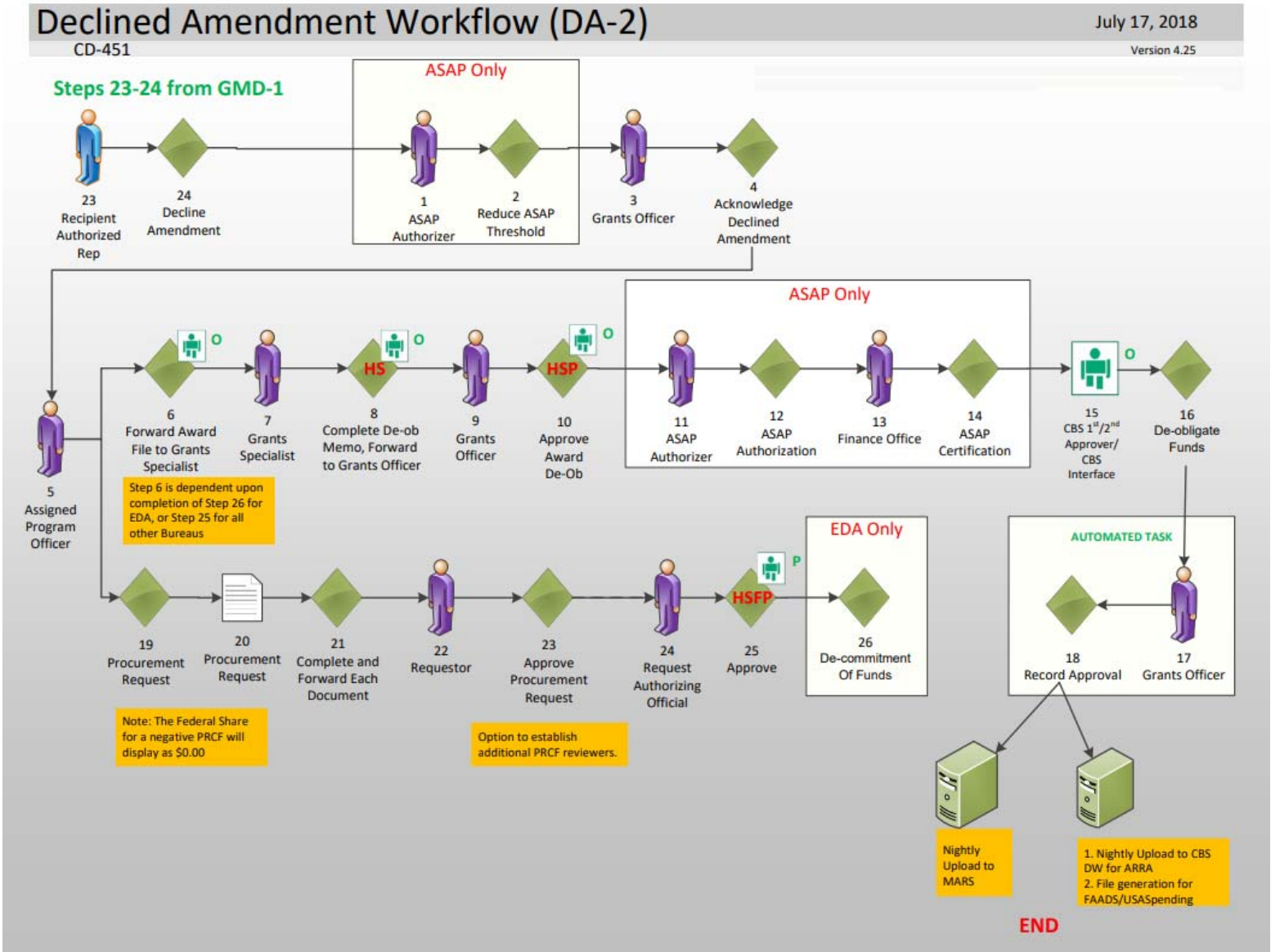
Justification for De-obligation:

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

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

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.

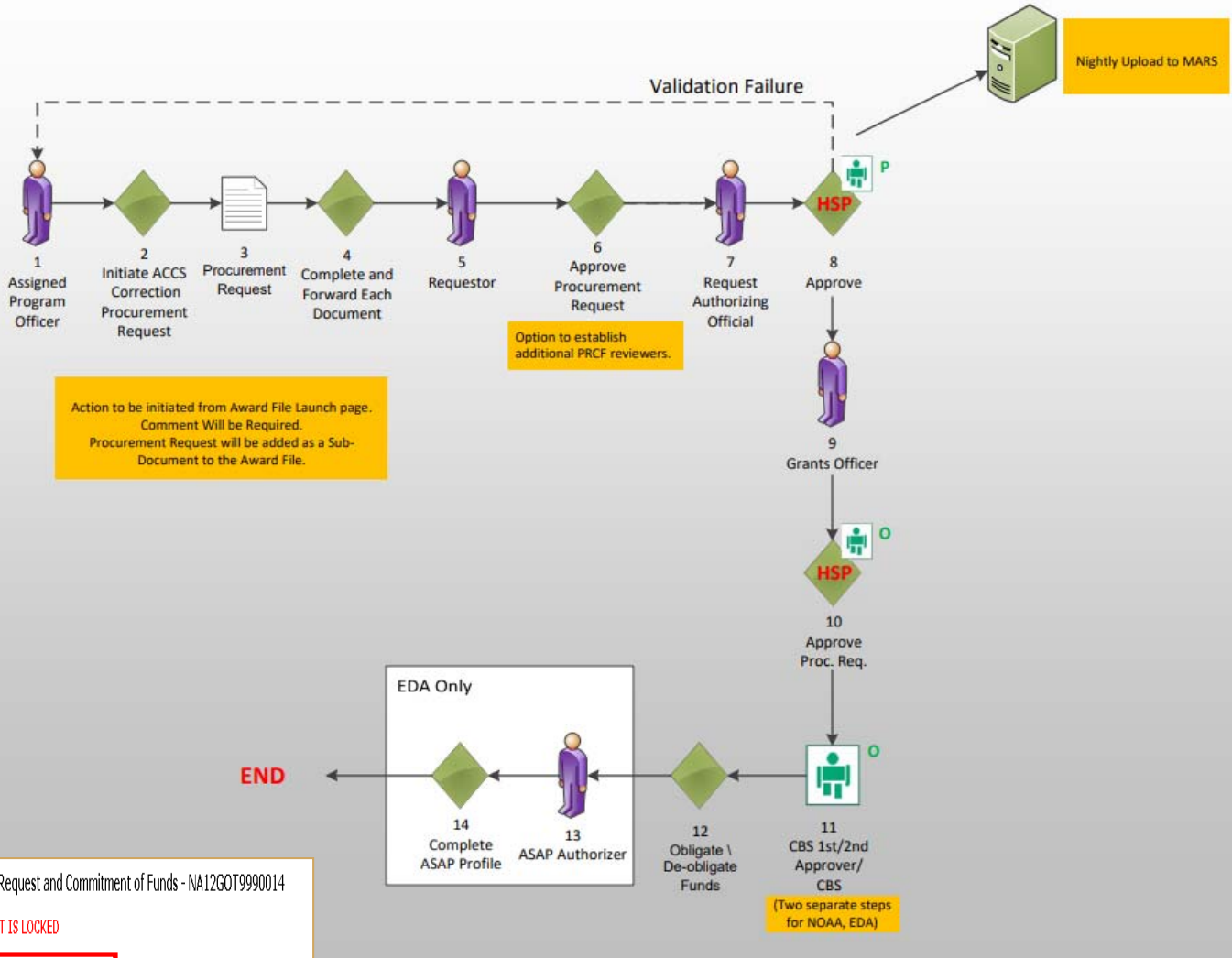
Correct ACCS Lines on an Approved Award

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

May 29, 2019

Version 4.27

The Award must be accepted by the Recipient in order for this option to be available.



Procurement Request and Commitment of Funds - NA12GOT9990014

THIS DOCUMENT IS LOCKED

THIS REQUEST IS APPROVED

Correct ACCS Lines

Last CBS Validation: Status:

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	14K38N8-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

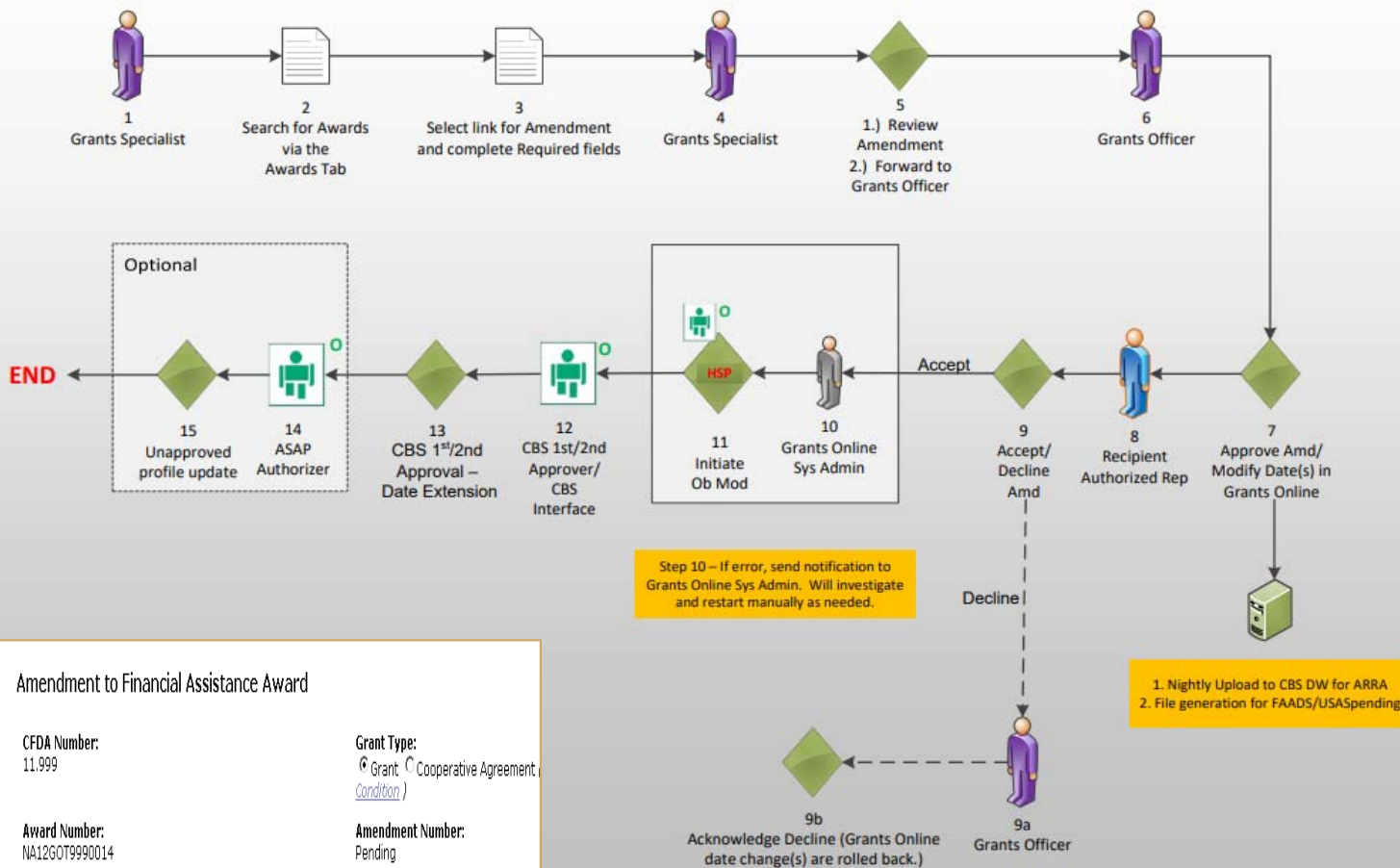
Administrative Amendment

Administrative Amendment – Date Changes (GMD-2)

February 25, 2019

Non-Funded Amendment

Version 4.26



Amendment to Financial Assistance Award

CFDA Number:
11.999

Award Number:
NA12GOT9990014

Recipient Name:
Institute for Community Managed Resources (ICMR)

Amendment Start and End Dates: *

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:

_____ - _____

Grant Type:
 Grant Cooperative Agreement
(Condition)

Amendment Number:
Pending

Street Address:
123 Main Street
Washington, DC 20000

Extend Work Completion To:
N/A

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.

ASAP Enrollment Request

DEPARTMENT OF COMMERCE
UNITED STATES OF AMERICA

commerce trade and banking

Inbox Awards Account Management Help

Welcome to Grants Online Test Person. You are logged in to TEST1. **Log Off**

ASAP Enrollment Request

ASAP Enrollment Request

Organization: SKILLIGALEE INC (2002987)
Request ID: 2444424

Information for the Point of Contact who will work with the Grants Making Agency to complete the ASAP Enrollment for this organization.

Organization Profile

EIN/TIN#: 98-7654321
DUNS: 068997902
Name: SKILLIGALEE INC
Type: R - Small Business
Address: 1234 MAIN ST
Berlin, MD 20076

Point of Contact

Name *
Title *
Email *
Phone Number *

Attachments:

No attachments.

Add new Attachment: [+]
Any changes to information on this page should be saved before adding or removing attachments. File name should be less than 255 characters.
[Large File Guidance](#)

Save Save and Start Workflow Cancel Print

NOAA Only: From this screen Non-ASAP recipients can initiate the ASAP Enrollment process. There is no need to send a separate email, simply submit the recipient's Point of Contact information.

For detailed Organization Profile Change Request information, please reference the link:
http://www.corporateservices.noaa.gov/grantsonline/Documents/Grantees/Org_Profile_Change_Requests_Grantees.pdf

NOTE: As a result of the Digital Accountability and Transparency Act (DATA Act) recipients must update their organization profile in SAM.gov. Grants Online now receives a daily extract from SAM.gov that will automatically update the organization's profile in Grants Online.