



Grants Online Training New Federal Program Officers

February 2021 –Virtual Class

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Grants Online Overview **Materials**

The following Grants Online reference materials are available from the Grants Online 101 web page:

- Grants Online Overview
- Grants Online Glossary
- Explanation of Grants
Online Roles
- System Navigation

<https://www.noaa.gov/organization/information-technology/grants-online-101>



Grants Online Training

Competitive RFA / NOFO Creation

Module #02

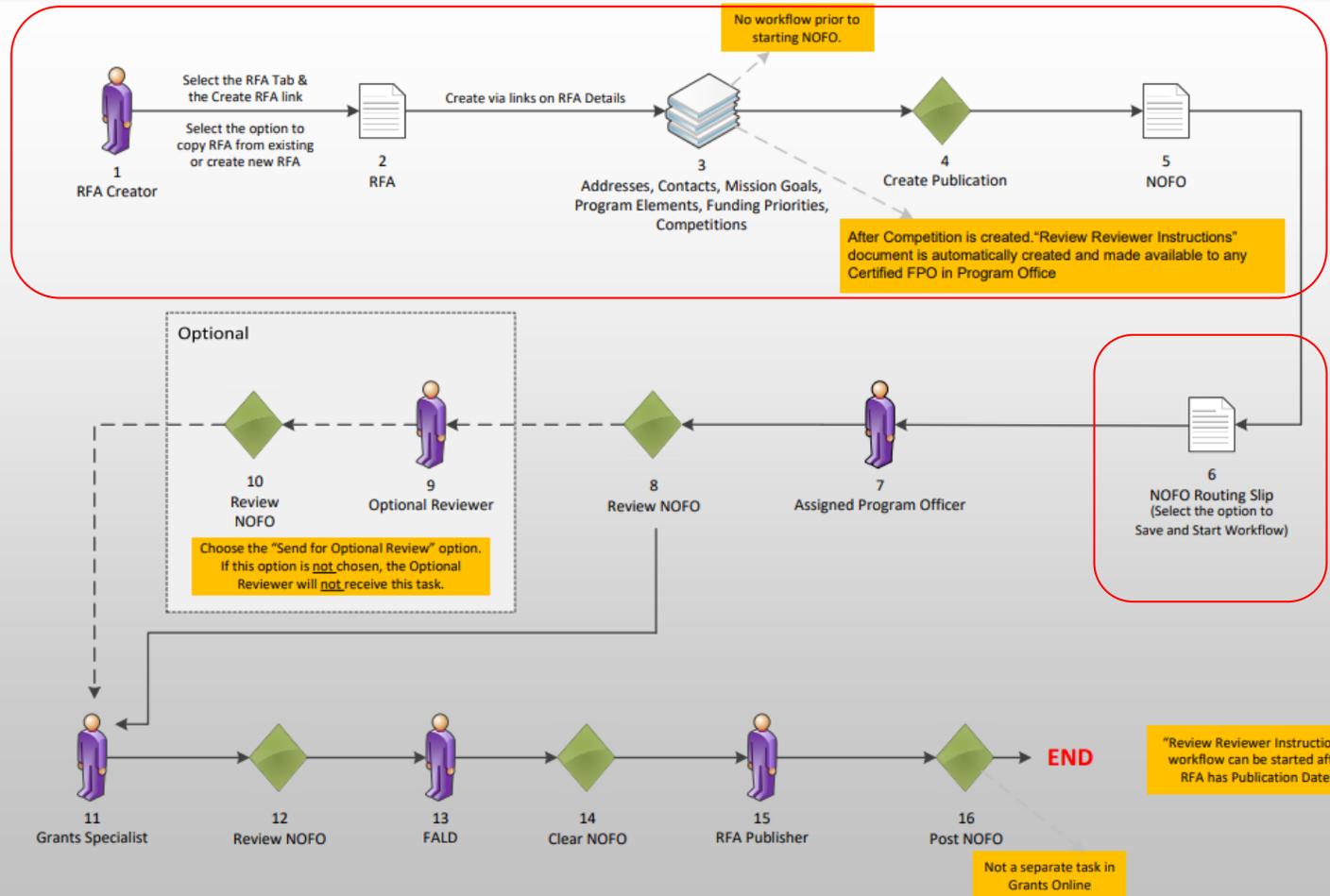
February 2021

Competitive Process – RFA Creation

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

March 4, 2020

Version 4.28



Corresponding Video

Hands on activity for this Module starts here.
You will be completing steps 1 – 6.

To begin, access the [Grants Online Training](#) site.

The gstudent account represents a Certified Federal Program Officer.
Sign in with your **gstudentXX** account.
The password is **gotremfeb21XX\$\$**.
Note: XX is your Student Number.

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.

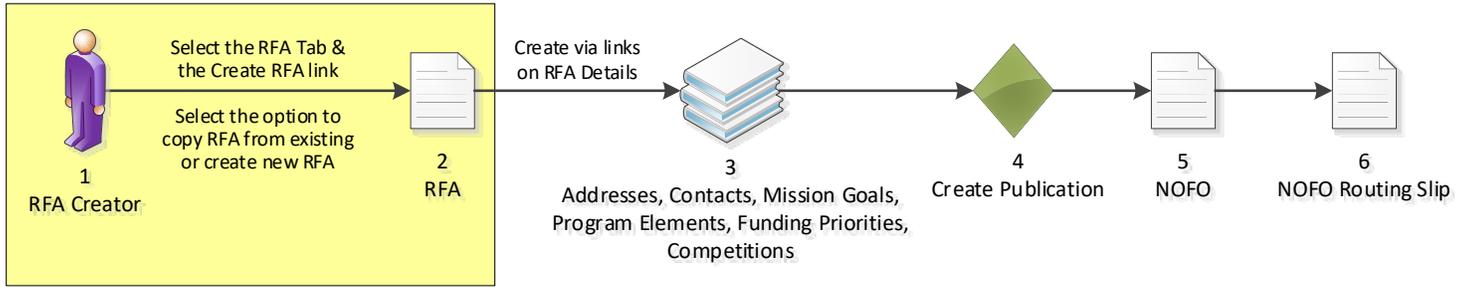
2. For both Universal and Competitive RFAs the user should know the person(s) in his/her Program Office who will receive the application(s) for the initial Minimum Requirements Check.

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*

Steps for setting up the BAA Process in Grants Online:

1. The Bureau sets up a Competitive RFA/NOFO under their Headquarters Line/Program Office with one competition for each separate Line/Program Office that needs to receive the applications.
2. A Universal BAA RFA is set up for each Line/Program office to correspond with each competition under the Competitive RFA/NOFO.
3. One person is assigned to receive the applications for each competition under the Competitive RFA/NOFO, and the same person is assigned to receive the applications when they move to the corresponding Universal BAA RFA. That person should have FPO roles under both the Headquarters Program Office and the Program Office that will receive the transferred application. (The system will only reassign the application to the new RFA but currently does not reassign the Program Officer.)
4. The Grants Online Help Desk will enter the Competitive and Universal BAA RFA's into a table in the system to facilitate the movement of the applications.
5. A background procedure is run approximately every two hours to transfer applications from the Competitive BAA announcement to their associated Universal BAA RFA.
6. The Program Office that received the transferred application can use the "Reassign Program Officer on Awards or Applications" function to reassign the transferred application to the appropriate FPO user.



Enter the RFA Name – Include your gstudent account number in the name.
Enter values in all fields with a red asterisk.
Anticipated Publication Date – Tomorrow's date.
Assigned Program Officer – Choose your StudentXX number.

Create RFA

Choose Type:

Competitive Broad Agency Announcement
 Congressionally Directed Congressionally Mandated
 Formula/Allotment Institutional
 Noncompetitive

Choose Action:

Create New from Scratch Create New from Existing

Create RFA

RFA Name*

Fiscal Year* (YYYY)

Announcement Type Initial

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

Line Office*

Assigned Program Office*

Assigned Program Officer*

CFDA Number*

Sub Program

Save **Cancel**

RFA Header Information

Document ID 2714271

RFA Name*

Fiscal Year* (YYYY)

Announcement Type Initial

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

Funding Opportunity Number

Line Office* Grants Online Training-NOAA (GOT)

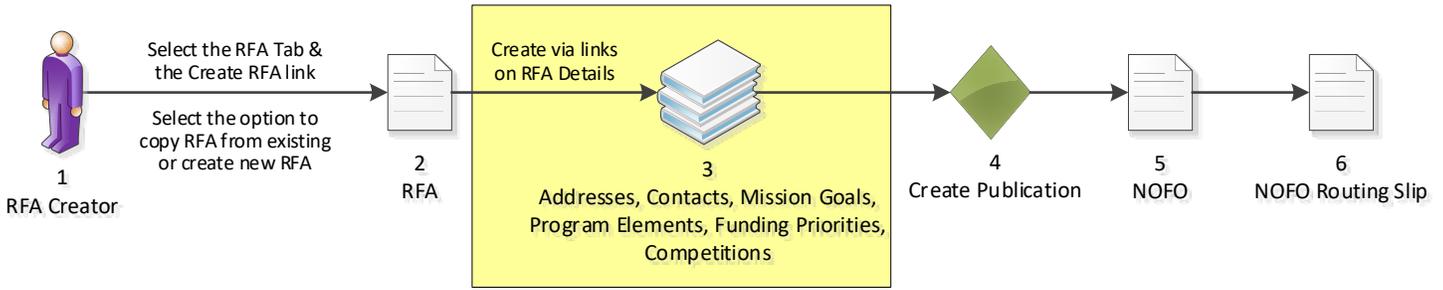
Assigned Program Office*

Assigned Program Officer*

CFDA Number*

Sub Program

- 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 Avail

[Add/Edit](#)

Competitions *

Press Save before selecting the following

No Competition

[Add New](#)

Anticipated Funding Amount = **\$10,000,000**

Anticipated Award Min = **\$10,000**

Anticipated Award Max = **\$1,000,000**

Anticipated Number of Awards Min = **10**

Anticipated Number of Awards Max = **20**

Step 1 - Enter "OCPO" in the Program Office Name field.

Step 2 - Click the check box in the search results, then click the "Add to RFA" button.

Step 3 - Click the "Done" button.

Search Addresses

Program Office Name:

Street Address:

City:

State:

Zip:

Search Results

One item found.1

<input type="checkbox"/>	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

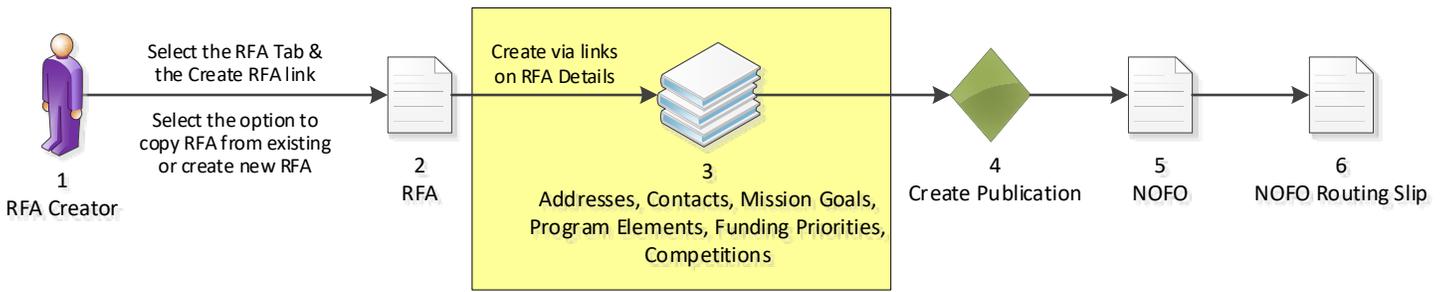
<input type="checkbox"/>	Program Office Name	Address
<input checked="" type="checkbox"/>	One Commerce Program Office (OCPO)	123 Grants Online Way, Money, MD 20000 USA

Selected Addresses for this RFA

One item found.1

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

Use your **XX** number in the Last Name field.



Pick any mission goal.

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:

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](#)

Done

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

Prior to clicking the "Add New" link under Competitions, be certain to save the data entered thus far for the RFA.

Competition Name * Fiscal Year *

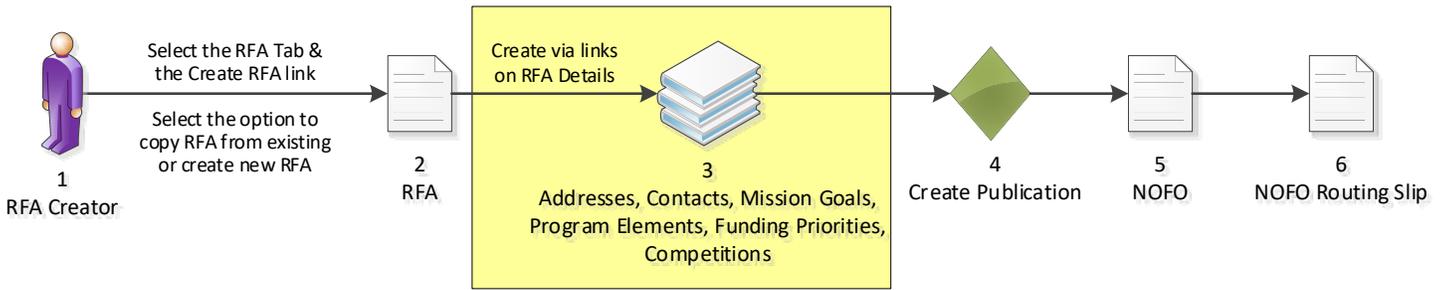
Competition Type * Group Individual Qualification

Assigned Program Office *

Competition Manager *

Save **Cancel**

Choose your StudentXX number for the Competition Manager.



Competition Name * Fiscal Year *

Competition Type * Group Individual Qualification

Assigned Program Office *

Competition Manager *

Selecting Official *

Select **"NOAA Official"** in the Selecting Official dropdown menu.

	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"/>

Funding Min = **\$1,000,000**
Funding Max = **\$10,000,000**

Anticipated Competition Schedule [Guidance](#)

Pre-Application Due Date Time:

Application * Due Date Time:

Anticipated Award Date * Days after Application Due Date

[View Anticipated Competition Schedule](#)

Application - Days after RFA
Publication Date = **1**
Time = **11:59 PM**
Anticipated Award Date = **180**

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

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

Application Routing *

No Program Officers are assigned to receive applica

Workload State

[View/Edit](#)

Application Routing Configuration Method: State

Routing Group Name*

Available States

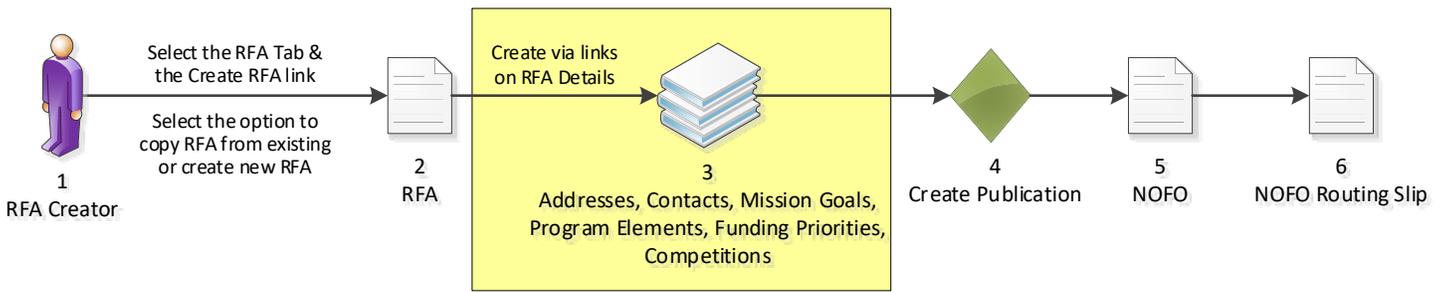
Please select a state
* Foreign State *
APO/FPO Central and South America
APO/FPO Europe, Middle East, and Africa
APO/FPO Korea, Japan, Philippines, Other Pacific
Alabama

Selected States

Available Users

Student00, Grants
Student01, Grants
Student02, Grants
Student03, Grants
Student04, Grants

Selected Users



Application Package

Select a Form Family : *

Select a Template : *

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.

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](#)

Specific Award Condition Details

Name: *

Description: *

[Spell Check](#)

[Save](#) [Done](#) [Cancel](#)

Specific Award Conditions

No Specific Award Conditions are associated with this competition.

[View/Edit](#)

Review Events No review events have been defined.

[Add New >>](#)

[Edit Notification Template for Non-Selected Applications >>](#)

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

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

Click the "Save" button before proceeding with adding the Review Event.

NOTE: For more information please reference item #4 on the FPO Pre-Award / Award User Resources site – SAC (Specific Award Conditions) Quick Reference Guide: <https://www.noaa.gov/organization/information-technology/federal-program-office-pre-award-award-user-resources>

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

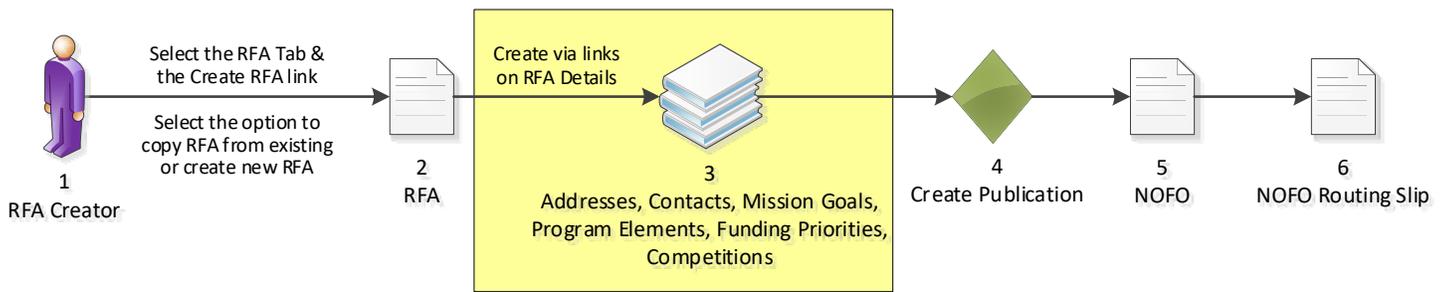
NOTE: There can be competitions for more than one fiscal year in a single RFA.

- In most cases the user will choose **Group** for Competition Type (see the distinction between the Competition Types below).

Group – All applications are due at the same time and evaluated against each other.

Individual Qualification – Applications are typically due over the course of a fiscal year and only need to meet or exceed an absolute standard to be funded. *(Used for BAA Competitions)*

- Remember to save often.
- You now have a page to add additional details for this Competition. Follow the step below to enter data into the blue boxes.
 1. Choose the Selecting Official.
 2. Under “Anticipated Competition Schedule” the Application Due Date can be set as a hard date or a “relative” date based upon the actual publication date. The determining factor is how close the application due date is to the anticipated posting date in Grants.gov.
 3. Click **View Anticipated Competition Schedule** to view the system-calculated dates.
- **NOTE:** The user who receives a routed application becomes the “Assigned Program Officer” for that application and will get the tasks to “Conduct Negotiations” and two or three Award File tasks: 1) the PO Checklist; 2) Procurement Request; and if applicable, 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: * ← Choose your **StudentXX** number for the 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
NOTE: Bonus Points does not work. Please keep this as "No".

Anticipated Review Start Date: * Anticipated Review End Date: *
Actual Review Start Date: * Actual Review End Date: *

Allow Reviewer Attachments: * Yes No
If Yes is selected, reviewers will be able to attach external files as part of the review. This will allow them to mark up a copy of the original Project Description, Budget, or other documents with their own comments and attach to the review. Additionally, it will allow them to attach documents with their reviewer comments.

Anticipated Start Date: **Today's date**
Anticipated End Date: **Tomorrow's date**

When using the scored criteria of "Quantitative – Percent" the Weight must add up to 100.

Percent Scoring Criteria

Name	Reviewer Comments	Reviewer Score	Minimum Score	Weight	Action	Action
Technical/Scientific Merit	Required	Required	0.0	20.0	Edit	Delete
Importance/Relevance and Applicability of Proposal to the Program Goals	Not Required	Required	0.0	20.0	Edit	Delete
Overall Qualification of Applicant	Not Allowed	Required	0.0	20.0	Edit	Delete
Project Costs	Not Required	Not Required	0.0	15.0	Edit	Delete
Outreach and Education	Not Allowed	Not Required	0.0	15.0	Edit	Delete
Data Management Plan Technical Soundness	Required	Required	0.0	10.0	Edit	Delete

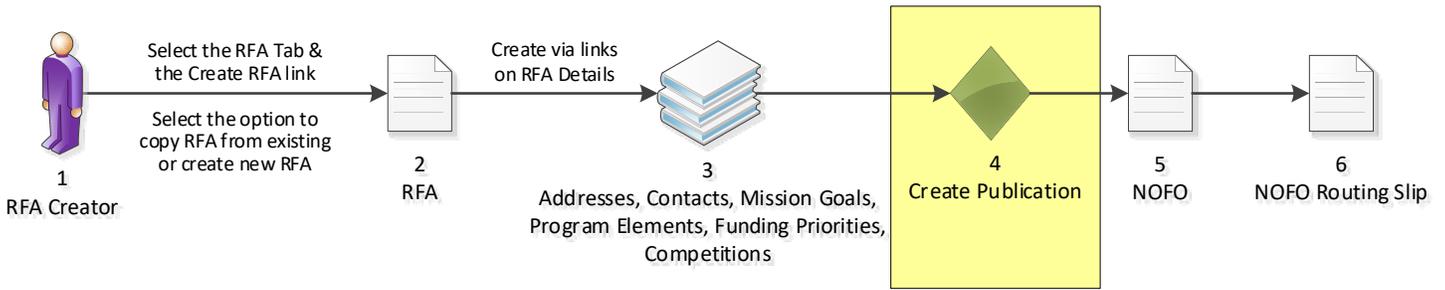
[Add New >>](#) [Reorder >>](#)

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

Click the "Save and Return to Main" button at the bottom of the screen.

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: 2714272
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.
- Review Events must be complete.
- There must be applications that have passed minimum requirements.

RFA

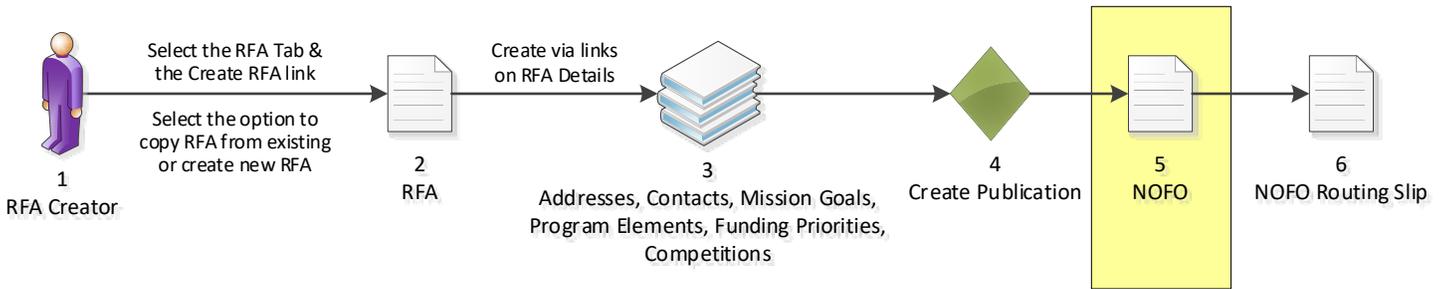
Id: 2714271
Status:

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.



Notice of Funding Opportunity

Please click on this icon to view the audit trail on this N

Please read the appropriate guidance documents bef

Regulatory Information Number (RIN)

Executive Summary

Federal Agency Name

Funding Opportunity Title

Announcement Type

NOFO Number

Catalog of Federal Domestic Assistance (CFDA) Number

[Dates](#) ✓

[Funding Opportunity Description](#) ✓

Full Text of Announcement

I. Funding Opportunity Description

- A. [Program Objectives](#) ✓
- B. [Program Priorities](#) (empty)
- C. [Program Authority](#) (empty)

II. Award Information

- A. [Funding Availability](#) (empty)
- B. [Project/Award Period](#) (empty)
- C. [Type of Funding Instrument](#) (empty)

III. Eligibility Information

- A. [Eligible Applicants](#) (empty)
- B. [Cost Share or Matching Requirement](#) ✓

Grants Online

Notice of Funding Opportunity, *and* Federal Register Notice Document Creation Assistance

MUST have a Notice of Funding Opportunity (NOFO). The NOFO will be availa

primary reference document for applicants. All grant programs must continue to c

grant provisions, such as application requirements, evaluation criteria and selection

cial Assistance law Division (FALD) will forward to the Office of the Assistant C

O announcements with funding that exceeds \$100 million and announcements for

arance of those announcements with the Office of Management and Budget (OMB

erse any statutory or regulatory requirements to publish a Notice of Funding Op

must still publish such notices if required to do so by any law or regulation. For th

Federal Register Notices.

ill be posted at Grants.gov throughout the fiscal year. Federal Program Officers ar

ted as an the Optional Reviewer prior to your NOFO being routed to FALD.

ndard format, as required by the Office of Management and Budget. Additionally,

rtment") has determined that there will be a required standard format, modeled on

OFO, you are also creating the wording for publication in the Federal Register No

e outline and format of the Notice of Funding Opportunity details page that you v

ice of Funding Opportunity report, which will be posted at Grants.gov. Fields on t

For training purposes, you only need to fill out a couple of items on this page.

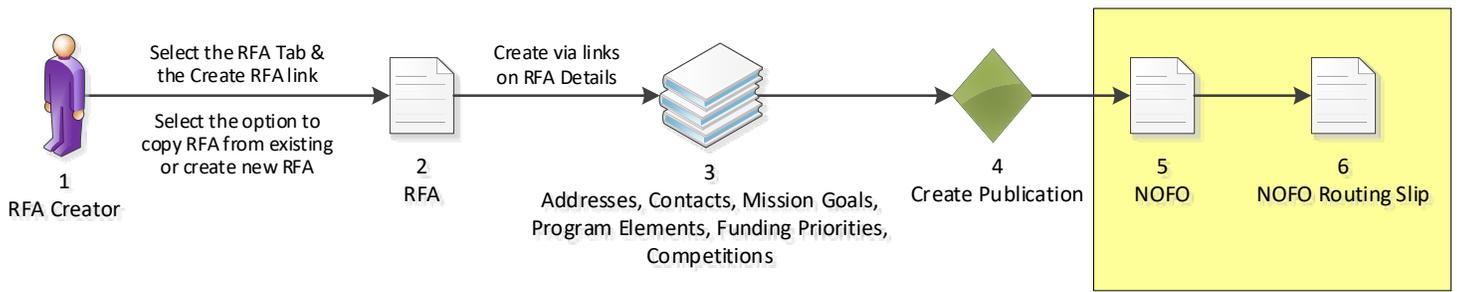
- Data previously entered into other parts of the RFA will not carry over to these fields. This forces the user to format the paragraphs appropriately for publication. Similarly, if the “Create New from Existing” option was used to create the RFA, the publication’s fields are blank. Again this forces 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 Student03

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-GOT

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 NOFO 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.

In the COMP-1 Process Map, Start Workflow is step 6. This step completes the hands on activity for this Module.

Please complete the assessment questions for this Module.



Grants Online Training

Review Event Processing

Module #03

February 2021

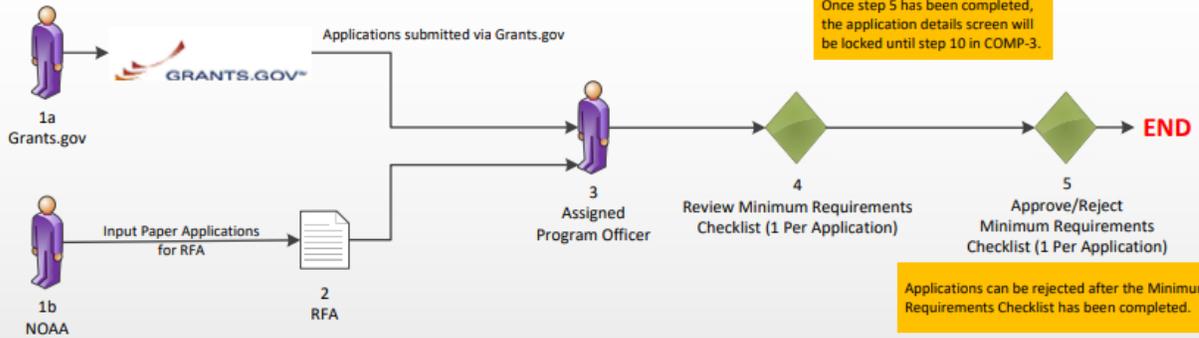
Competitive Process – Application and Review Event

Applications and Review Event Overview (COMP-2)

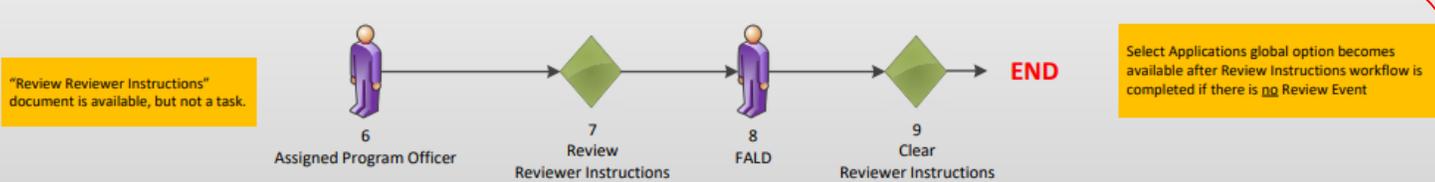
March 4, 2020

Version 4.28

Receive applications



Review Reviewer Instructions



Review Event Workflow

Only if Review Event Exists

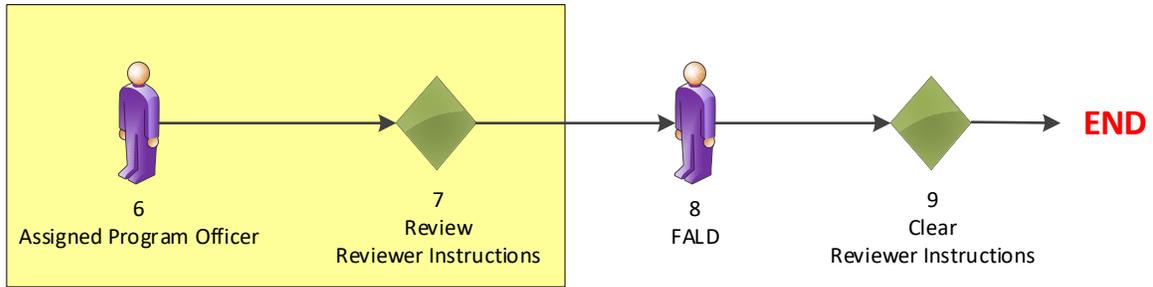
- Review Events are optional in Grants Online.
- Review can be conducted using Grants Online functionality or outside of Grants Online



Corresponding Video

There are no hands on activities for this module.

The assumption is that applications have been submitted.



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.

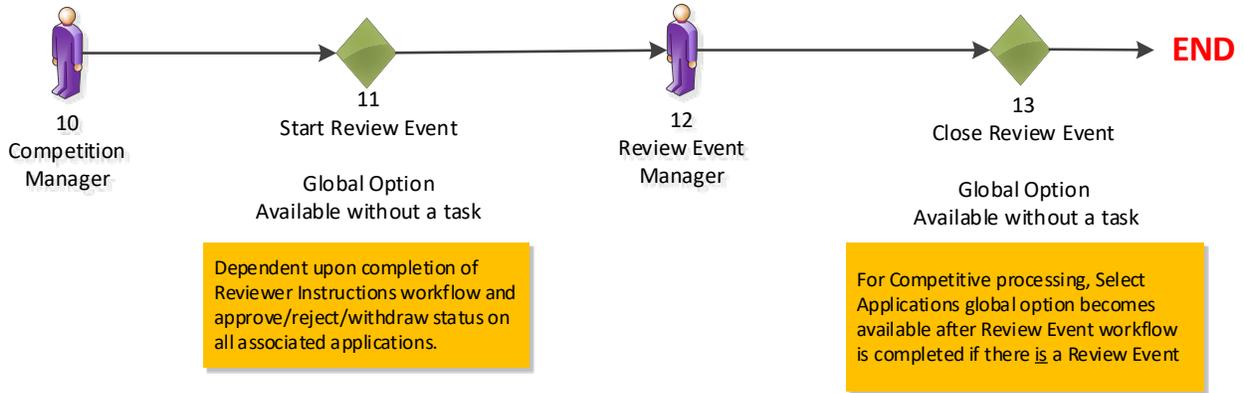
Done

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:

Your Comments:

Independent Individual Merit Review

Id: 2279925
Status: ManageReviewEvent - Not Started

Action:

Your Comments:

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

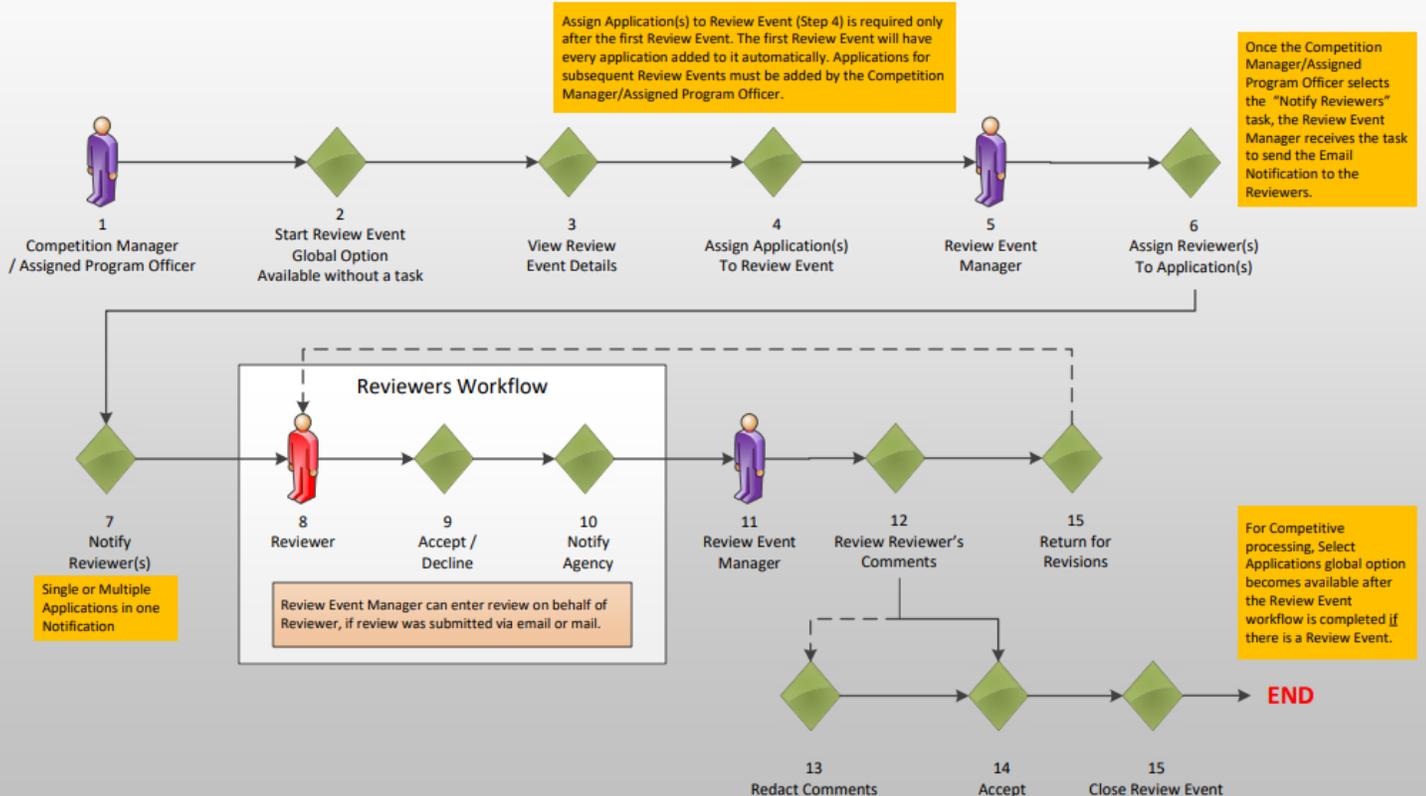
Review Event Workflow – Federal Agency (REF)

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 the PMO website:

Review Event Guidance

- Create a Review Event using Grants Online - http://www.noaa.gov/sites/default/files/atoms/files/ReviewEvent_Creation.pdf
- Conduct a Review Event using Grants Online - http://www.noaa.gov/sites/default/files/atoms/files/ReviewEventManager_UserGuide.pdf
- Quick Reference Guide for an Application Reviewer - http://www.noaa.gov/sites/default/files/atoms/files/Reviewers_Quick_Ref_Guide_4_08.pdf

Competitive Process – Reviewer

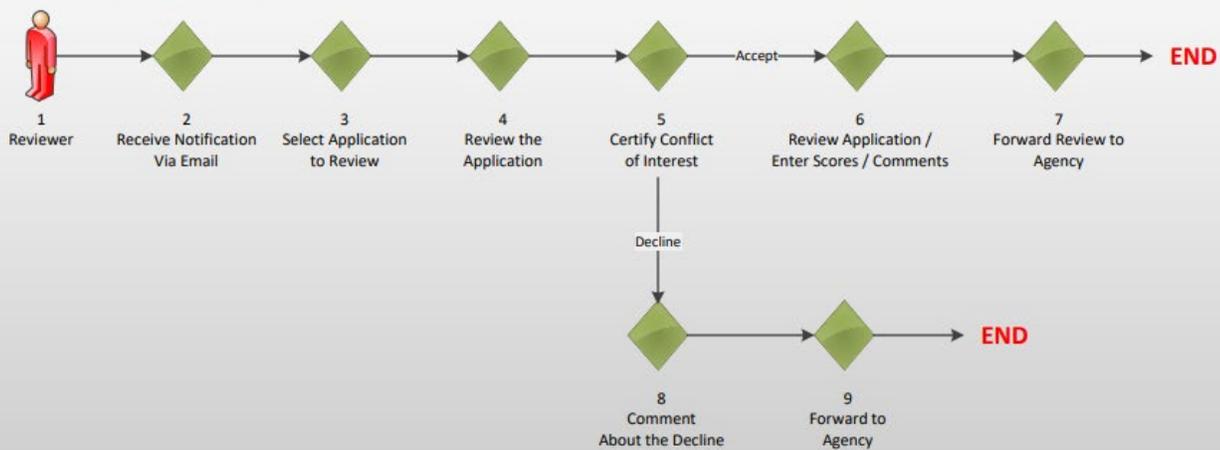
Review Event Workflow – Reviewer (RER)

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.

Email to Application Reviewer

Dear John Smith,

Thank you for agreeing to review the application listed below. The application, Review forms, and instructions for completing the Review is available online at the Grants Online web site: <https://grantsonline.rdc.noaa.gov/flows/home/Login/reviewerLogin.do>.

The application that you are requested to review is for the Notice of Funding Opportunity Final Review Module Acceptance Test
FFO Number: NOAA-NMFS-SE-2019-2003142.
The Review Event is named: Mail Review

Your login credentials for this Review Event are as follows:

Username is: John.Smith@sample.com.
Personal Identification Number (PIN) is: 272D.
This PIN is valid for this Review Event **only**.

If you are having trouble logging in or otherwise having trouble conducting the Review, please contact the Review Event Manager, listed below. The Review Event Manager will need the information in the previous two paragraphs to assist you.

The Review Event Manager is: Jeffrey E. Brown
301.444.1212
testemail@msg2.rdc.noaa.gov

The Review Event Manager has scheduled this Review Event to end on August 15, 2019. You may be contacted separately by the Review Event Manager regarding a different due date for this Application Review.

The Application you are being asked to review is:

Application: [Maine Department of Marine Resources](#)
Project Title: [TEST RECORD - Maine Red Tide Disaster Relief Program](#)

If you are having trouble conducting the requested Review, first contact the Review Event Manager listed above. If that person is not available, or otherwise unable to assist you, please contact the Grants Online Help Desk at 301.533.9533, Monday-Friday between 8:00 AM and 6:00 PM Eastern Standard Time.

We at the Department of Commerce, National Marine Fisheries Service (NMFS), appreciate and thank you for the time and effort you are taking to assist us with this effort.

Sincerely,
Jeffrey E. Brown

Please complete the assessment questions for this Module.



Grants Online Training

Competitive Application Selection Process

Module #04

February 2021

Competitive Process – Select Applications for Funding

Competitive Process (COMP-3)

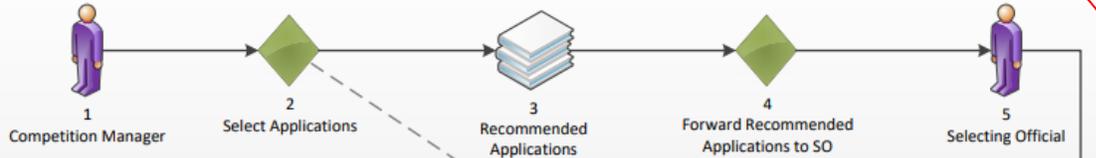
Select Applications for Funding Overview

March 4, 2020

Version 4.28

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.



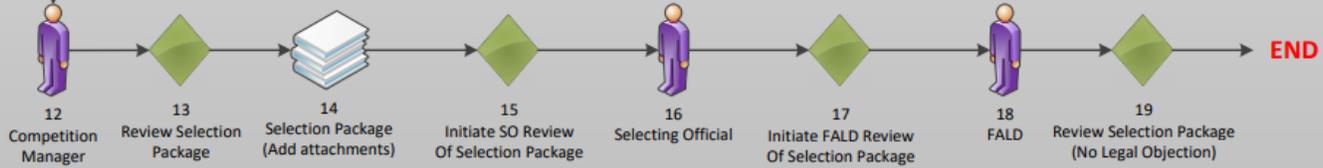
- Recommended Applications for funding
- Global option on competition launch page.

Option is dependent upon completion of Reviewer Instructions workflow and Application workflow. Also dependent upon completion of Review Event workflow if one exists.



- Generate Award Number
- Associate Applicant Org
- Associate Authorized Rep

Applications can be rejected at this step.



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

Selection Package Page

Corresponding Video

There are no hands on activities for this module.

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.

Please complete the assessment questions for this Module.



Grants Online Training

Universal RFA Creation

Module #05

February 2021

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:

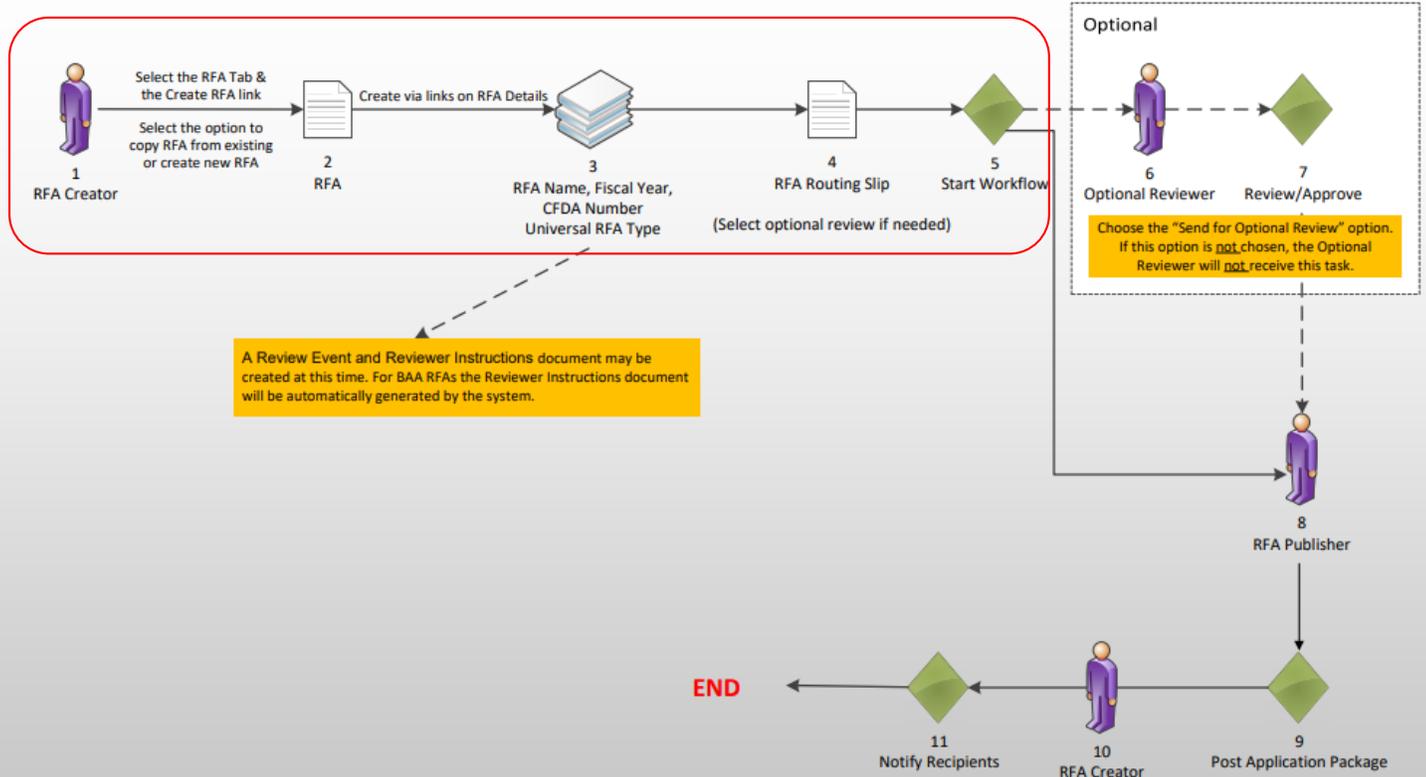
1. The Assigned Program Officer for the RFA must be a “Certified FPO” to advance documents to the next step in the workflow process.
2. For both Universal and Competitive RFAs the user should know the person(s) in his/her Program Office who will receive the application(s) for the initial Minimum Requirements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

Universal Process – RFA Creation

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

March 4, 2020

Version 4.27



[Corresponding Video](#)

Hands on activity for this Module starts here.

You will be completing steps 1 – 5.

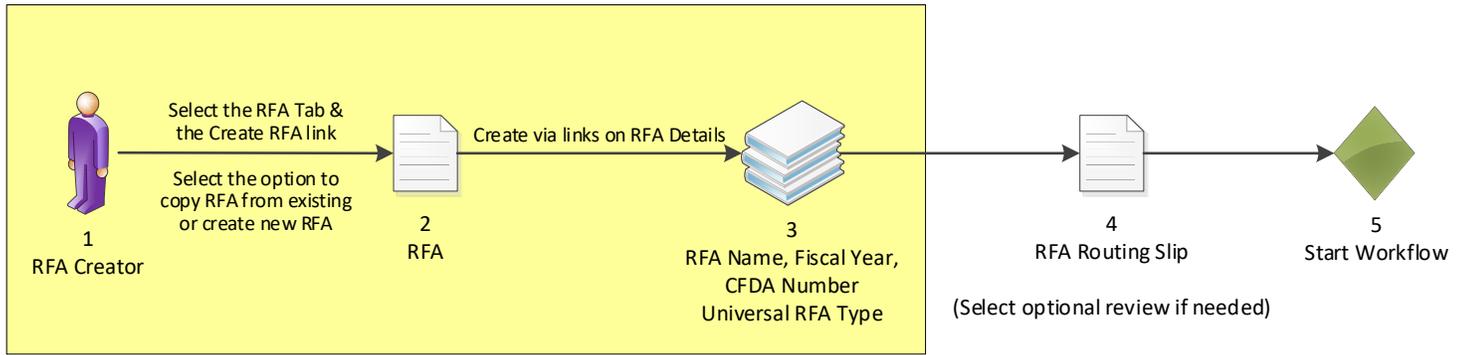
To begin, access the [Grants Online Training](#) site.

The gstudent account represents a Certified Federal Program Officer.

Sign in with your **gstudentXX** account.

The password is **gotremfeb21XX\$\$**.

Note: XX is your Student Number.



Enter the RFA Name – Include your gstudent account number in the name.
 Enter values in all fields with a red asterisk.
 Assigned Program Officer – Choose your **StudentXX** number.

RFA Details

RFA Header Information

Document ID: 2714322

RFA Name*: Sample Universal RFA for FPO Training

Fiscal Year*: 2020 (YYYY)

Announcement Type: I

Funding Opportunity Number: NOAA-GOT-OCPO-2020-2005809

Line Office: Grants Online Training-NOAA (GOT)

Assigned Program Officer*: One Commerce Program Office (OCPO)

Assigned Program Officer*: Student03, Grants

CFDA Number*: 11.998 - Grants Online Training CFDA

SubProgram: -Select a Sub Program-

RFA Type*: Noncompetitive

RFA Additional Information [Guidance](#)

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](#)

Anticipated Funding Amount = **\$1,000,000**.
 Application Due Date = **09/30/2021**.
 Time format is **11:59 PM**.

Step 1 - Enter **"OCPO"** in the Program Office Name field.

Search Addresses

Program Office Name:

Street Address:

City:

State:

Zip:

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

Step 2 – Click the **"Add to RFA"** button.

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

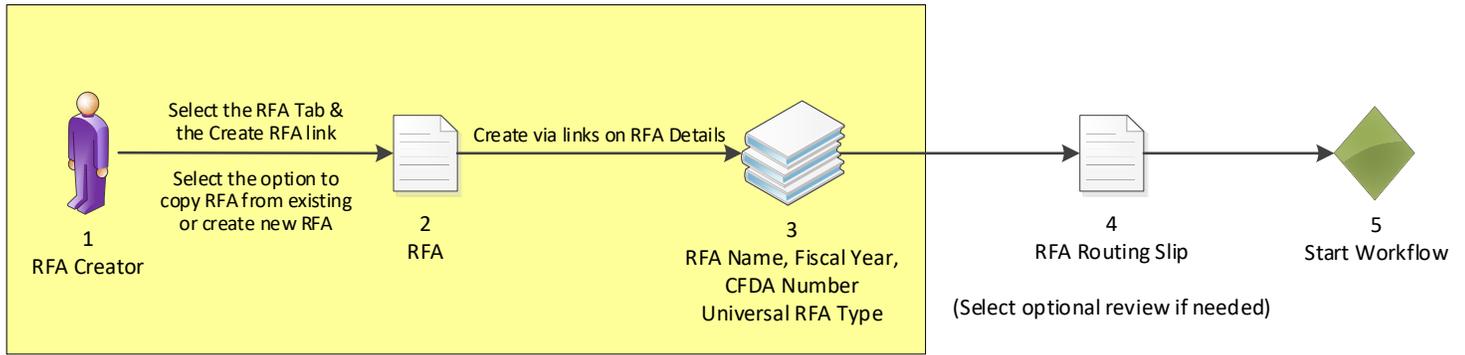
Step 3 – Click the **"Done"** button.

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

Use your **XX** number in the Last Name field.



RFA Details

RFA Header Information

Document ID 2714322
 RFA Name * Sample Universal RFA for FPO Training
 Fiscal Year * 2020 (YYYY)
 Announcement Type I
 Funding Opportunity Number NOAA-GOT-OCPO-2020-2005808
 Line Office Grants Online Training-NOAA (GOT)
 Assigned Program Office * One Commerce Program Office (OCPO)
 Assigned Program Officer * Student03, Grants
 CFDA Number * 11.998 - Grants Online Training CFDA
 SubProgram -Select a Sub Program-
 RFA Type * Noncompetitive

RFA Additional Information [Guidance](#)

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
 Recipient *

Select Organization
 Enter your search criteria to find the organization.
 Organization Name
 Address-City
 DUNS Number 175191923
 EIN Number
 Address-State Please select a state

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

Step 1 – Click the “Search” button

Step 2 – Enter DUNS Number 175191923.

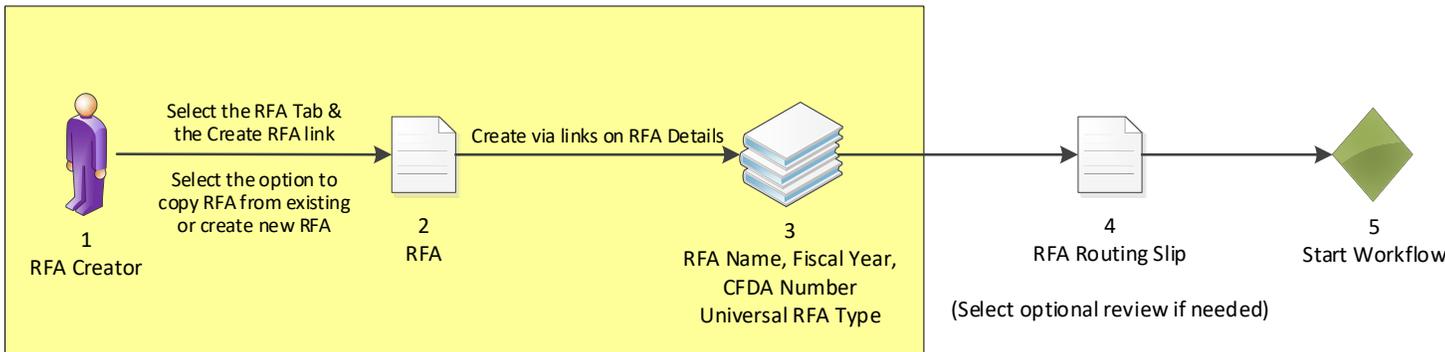
Step 3 – Click the “Search” button

Step 4 – Click “Select” next to Name = Conservation International Foundation

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

Select	Org ID	Name	Bureau	Address	DUNS	DUNS+	EIN	Case Code	ASAP tid	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.



Pick any mission goal.

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](#)

Specific Award Conditions
No Specific 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 adding or removing attachments.
[Large File Guidance](#)

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

Application Routing Configuration Method: Workload

Available Users	Selected Users to receive applications
Student08, Grants	Student11, Grants
Student09, Grants	
Student10, Grants	
Student12, Grants	
Student13, Grants	
Student14, Grants	
Student15, Grants	
Student16, Grants	
Student17, Grants	
Student18, Grants	

Save and Return to Main **Cancel**

Application Package

Select a Form Family : * SF-424

Select a Template : * NOAA Construction or Non Construction Application Package

Mandatory Forms

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

Optional Forms

- Other Attachments Form SF-424A
- SF-424B
- SF-424C
- SF-424D
- SF-LLL

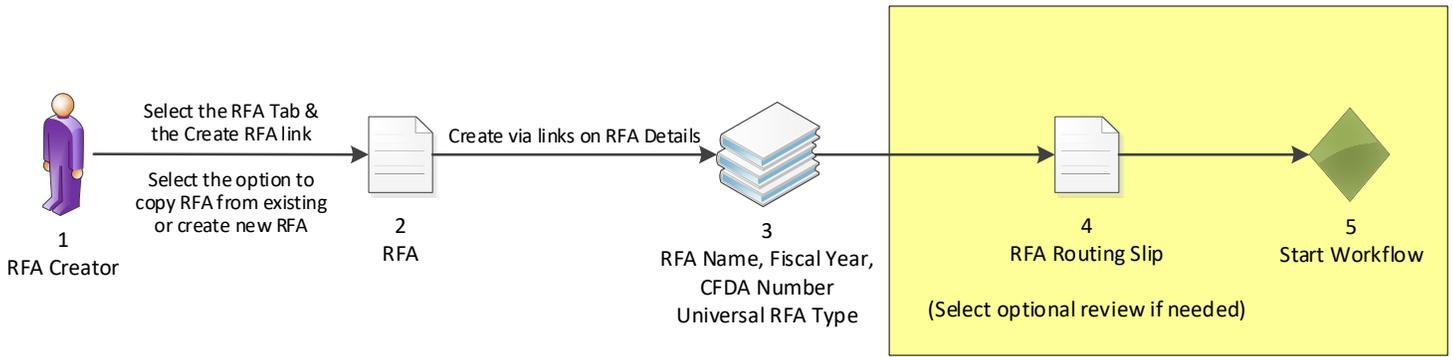
Attachments:
No attachments.

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

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 **Save and Return to Main** **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 Student03

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](#)

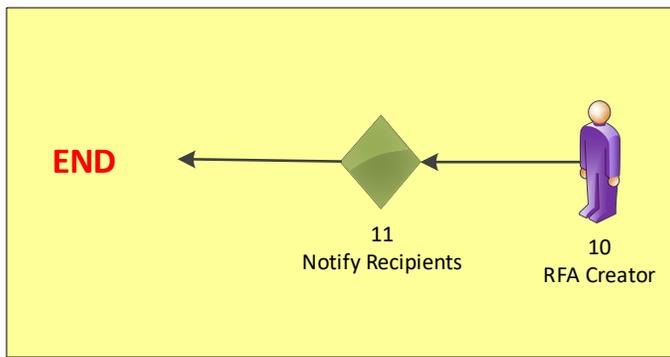
RFA Publisher

All RFA Publishers will receive a task to review this document. One RFA Publisher will claim ownership. This is the person who coordinates and posts the NOFO 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](#)

In the UNI-1 Process Map, Start Workflow is step 5. Training staff will be monitoring the workflow and will complete steps 8-9. Please check the “Your Tasks” page for the next step.



Your Tasks

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

19 items found, displaying all items.1

View	Award Number	Task Received Date	Document Id	Task Id	RFA Name	Document Type	Applicant State	DBA Name	Completed Date	Award Start Date
View	N/A	10/30/2019	2714322	5694490	Sample Universal RFA for FPO Training	RFA	N/A			

RFA

Id: 2714322
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	10/30/2019 12:22:35 PM	10/30/2019 12:23:05 PM	10/30/2019 12:23:05 PM	NOAA Publisher	RFAPublisher	ApplicationPackagePosted	Complete	
Approve or Review	10/30/2019 12:22:22 PM	10/30/2019 12:22:35 PM	10/30/2019 12:22:35 PM	Grants Student03	RFACreator	InitiateApplicationPackagePosting	Complete	

Export options: [Excel](#)

By completing the Notify Recipient task you are completing steps 10-11 from UNI-1. This step completes the hands on activity for this Module.

Please complete the assessment questions for this Module.

Then proceed with Entering an Application (UNI-2) in the next module.

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



Grants Online Training

Universal Application Processing

Module #06

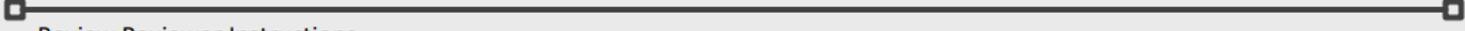
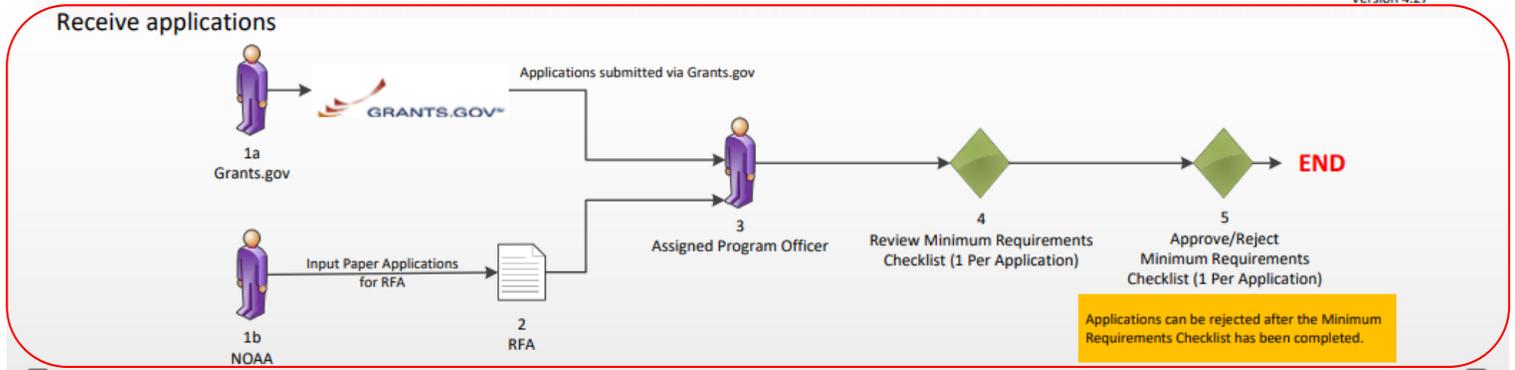
February 2021

Universal Process – Applications and Review Event

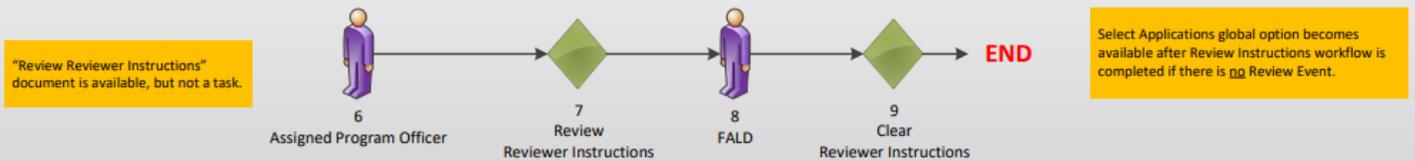
Applications and Review Event Overview (UNI-2)

April 29, 2019

Version 4.27



Review Reviewer Instructions

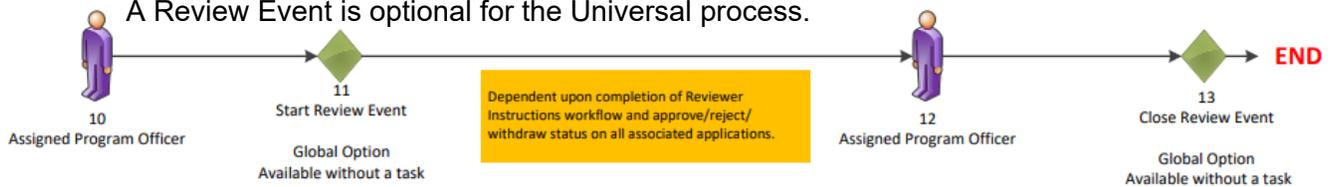


Review Event Workflow

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.

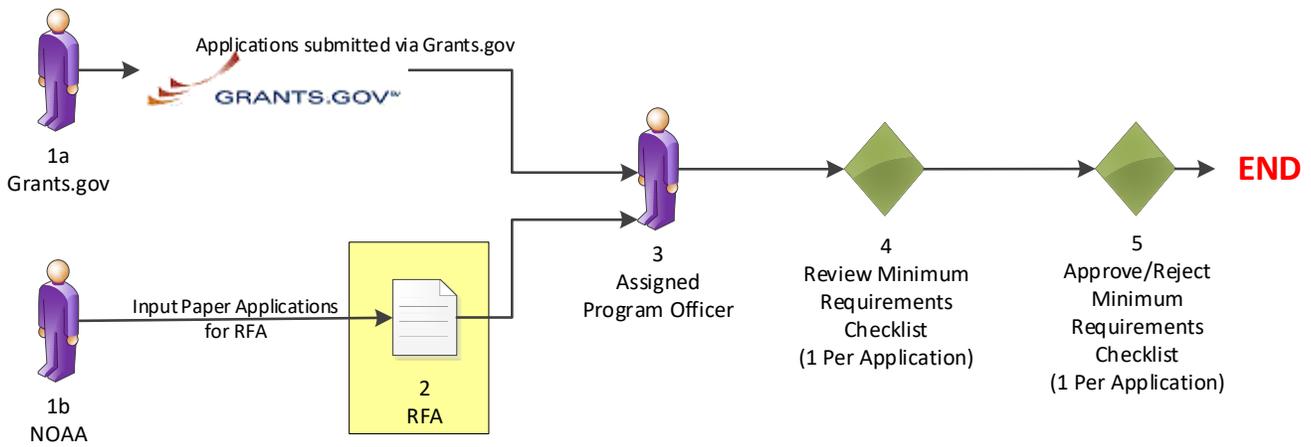


[Corresponding Video](#)

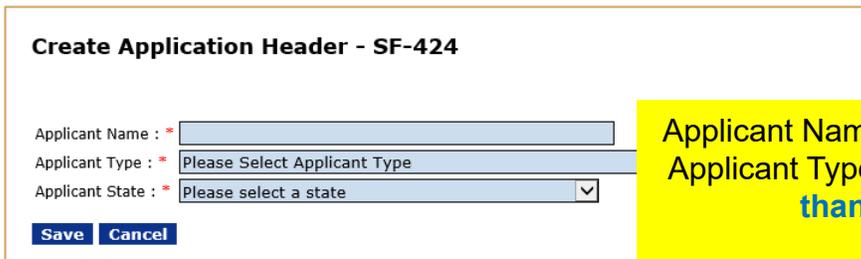
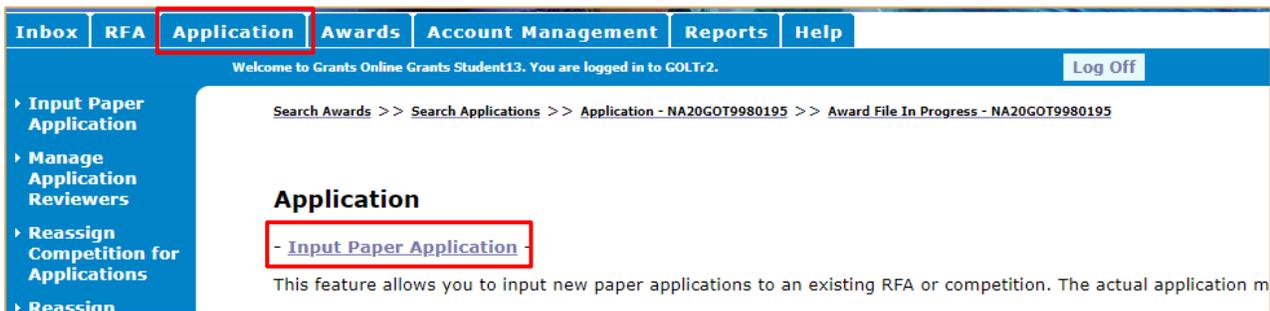
Hands on activity for this Module starts here.
You will be completing steps 1 – 5.

To begin, access the [Grants Online Training](#) site.

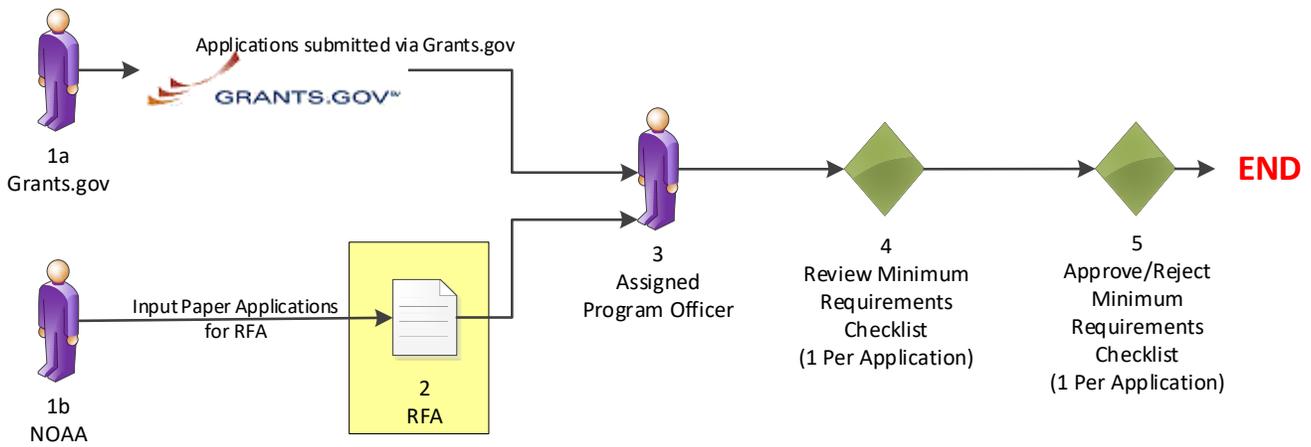
The gstudent account represents a Certified Federal Program Officer.
Sign in with your **gstudentXX** account.
The password is **gotremfeb21XX\$\$**.
Note: XX is your Student Number.



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.



Applicant Name: **Conservation International Foundation**
 Applicant Type: **Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)**
 Applicant State: **Virginia**



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):

Principal Place Of Performance : * Applicant's Legal Address
 Foreign
 Multi-state
 Statewide
 Countywide
 Citywide
 Zipcode

Note: This section is for the regular SF-424 or for any additional Principal Investigators / Project Directors not listed below

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: * Submitted Date:

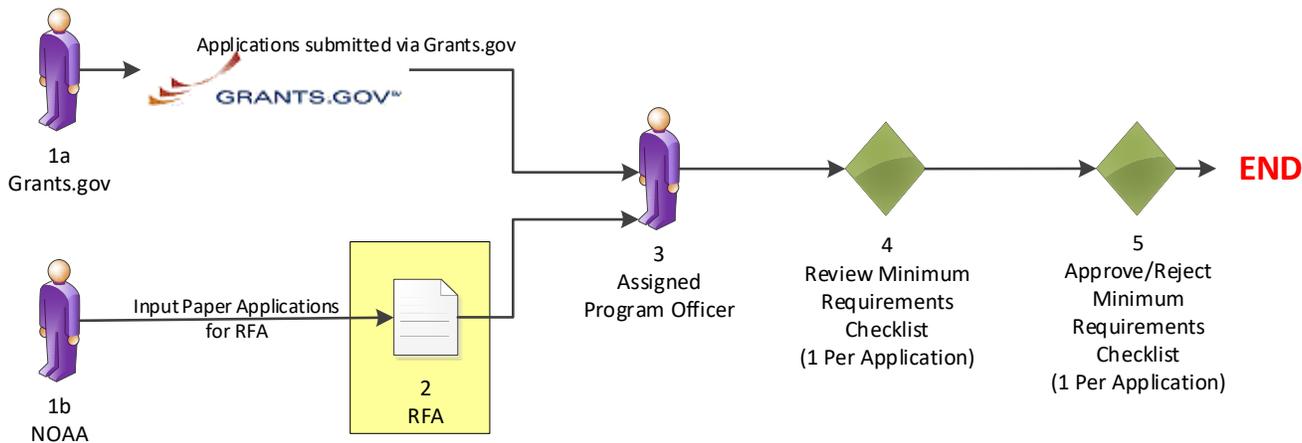
State Received Date: Federal Agency Received Date: * Time: *

Applicant Identifier: State Application Identifier: Federal Identifier:

Principal Place of Performance defaults to "Applicant's Legal Address"

Project Start Date: **10/01/2020**
 Project End Date: **09/30/2022**
 Federal Agency Received Date: **Today's date**
 Time: **Current time**

To see what a SF-424 Paper Application looks like, [click here](#).



Applicant Information

Legal Name:

Department Name:

Division Name:

Duns Number: (9 or 13 digit number)

EIN Number: (xx-xxxxxxx)

Street:

City: County:

State: Please select a 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: Please select a state

Province:

Country: Zip:

Other Application Information

Type of Applicant: Please Select Applicant Type

Other (specify):

Small Business Organization Type: Women Owned Socially and Economically Disadvantaged

Descriptive Title of Applicant's Project:

Project Areas:

CFDA Number: 11.998 - Grants Online TRAINING - NOAA

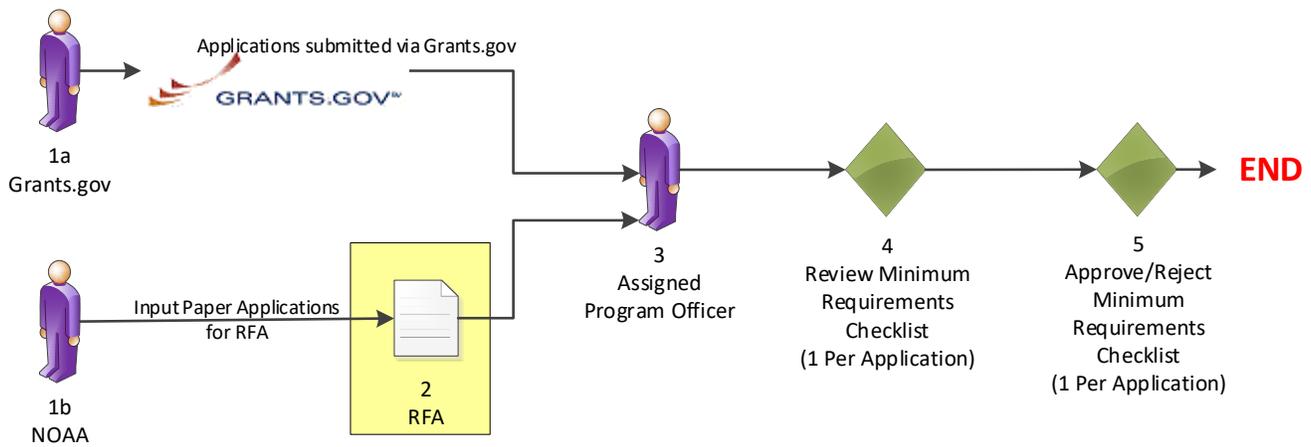
Duns Number: 175191923

Type of Applicant was already entered at the beginning of the application process.

Enter Title of Project. Within the title, use your **gstudentXX** number. This will allow for an easy way to search for your application if needed.

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 12372 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:

Authorized Representative

Prefix: First Name: Middle Name: Last Name:

Title:

Phone Number:

Email:

Street:

City:

State:

Country:

Total Funding: \$20,000.

Application Funding Details: *

Total Funding: *

Multi Year Award: No

Nothing found to display.

[Add New](#)

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

Add Application Funding Details

Application Total Funding : 500000

Fiscal Year : *
(use format YYYY)

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

Federal Funding : * Program Income :

Applicant Funding :

State Funding :

Local Funding :

Other Funding :

Total Funding :

[Save](#) [Close](#)

Start Date: 10/01/2020
End Date: 09/30/2022
(Both dates are auto-filled)
Federal Funding: \$10,000
Applicant Funding: \$5,000
State Funding: \$5,000

Application Funding Details: *

Total Funding: *

Multi Year Award: No

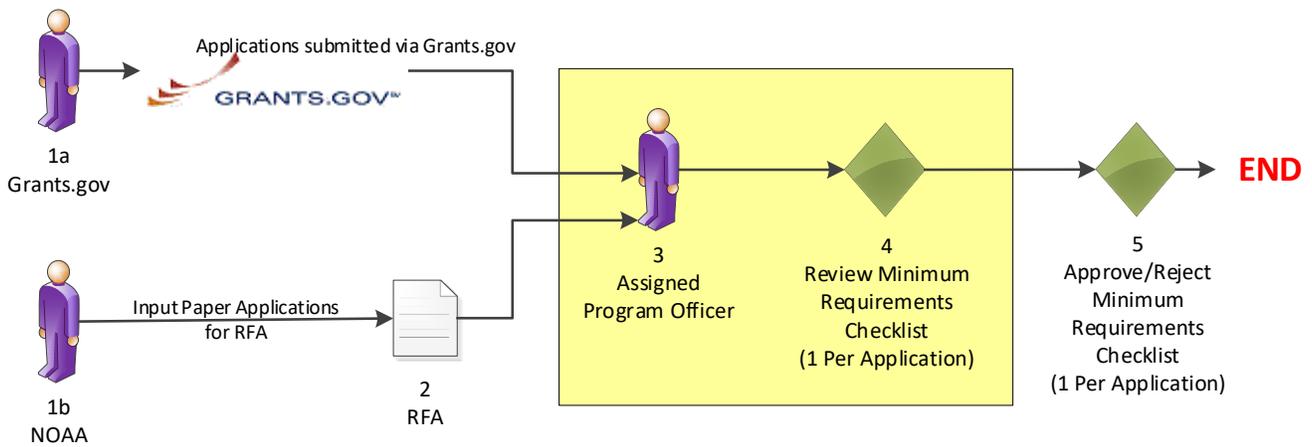
Fiscal Year	Start Date	End Date	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2020	10/01/2019	09/30/2023	\$500,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500,000.00	\$0.00	Edit	Delete

[Add New](#)

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

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.



View	Task Id	Task Name	Task Status	Award Number	Document Id	Document Type
View	5694901	Review Min. Req. Checklist	Not Started	N/A	2714351	Application
View	5694490	Notify Recipients	In Progress	N/A	2714322	RFA

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
Received on Time: Was the application received before the due date and time?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/>
Correct Federal Funding: Does the application request the correct Federal funding amount?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/>
Correct Match: Does the application contain the correct non-Federal funding amount?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/>
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"/>
Data Management Plan: Was a Data Management Plan included with the proposal if required by the NOFO?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<input type="text"/>

Overall Comments:

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

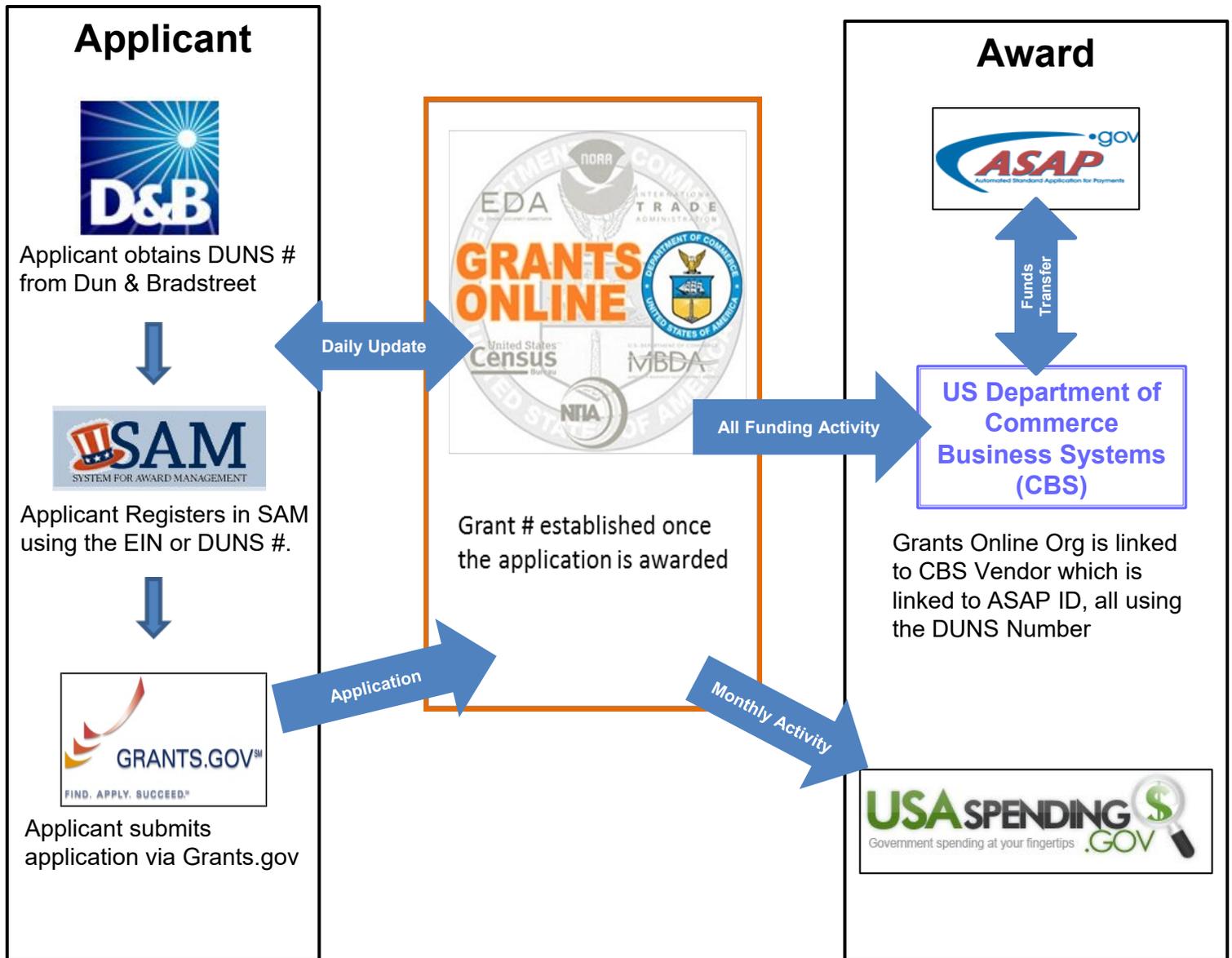
Choose the "Yes" radio button for each criteria. Then click the "Save and Return to Main" button.

On the following screen, choose "Approve Application for Meeting Minimum Requirements."

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



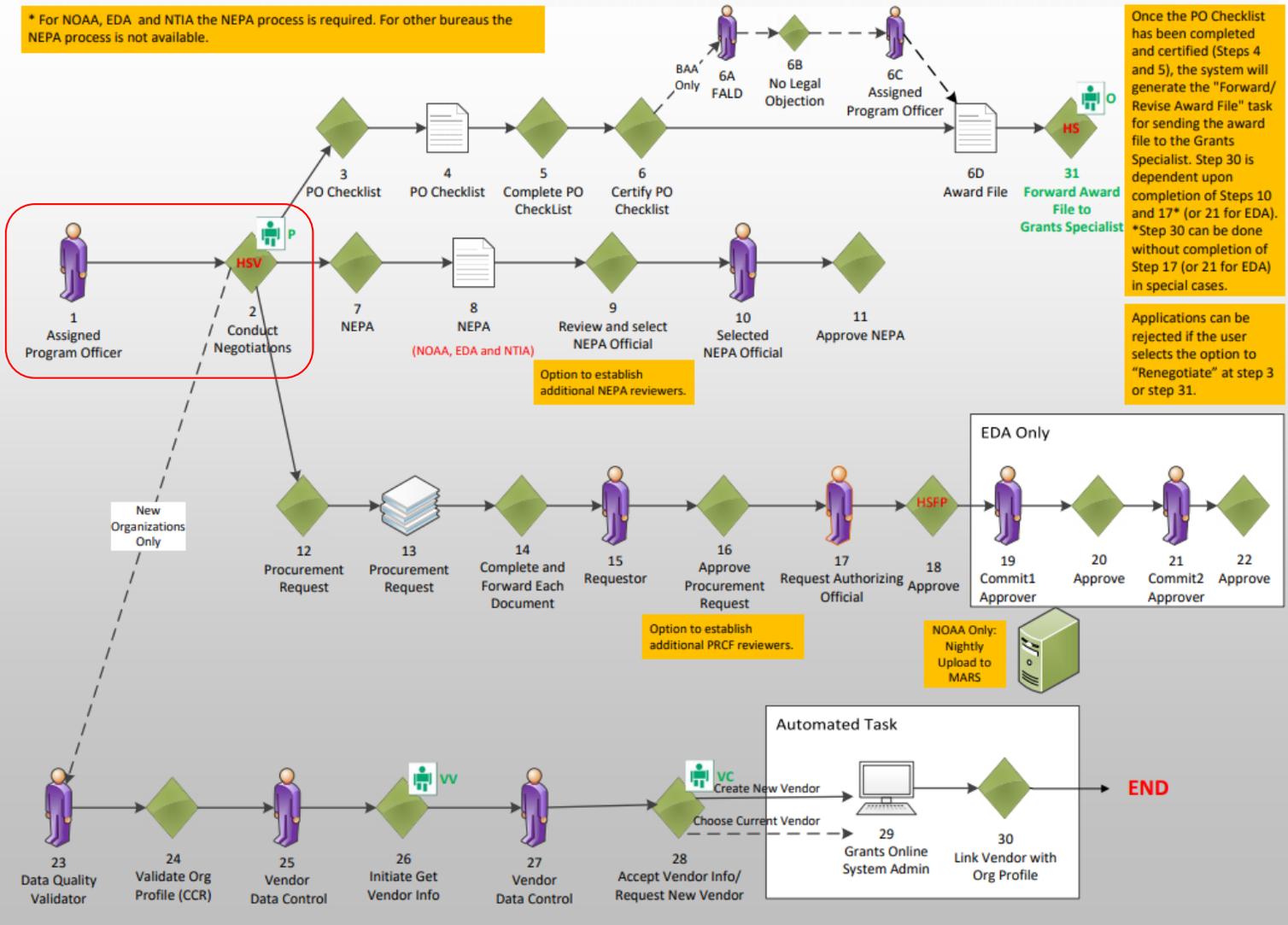
Universal Process – Prepare Applications for Funding

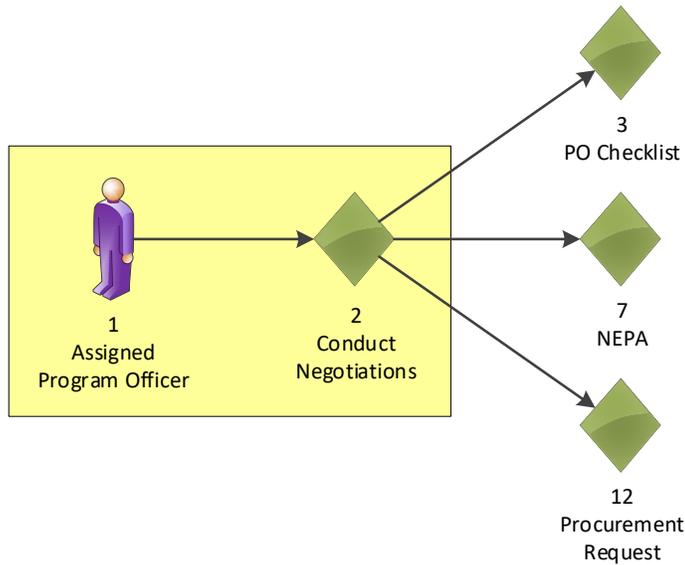
Prepare Applications for Funding Overview (UNI-3)

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.





View	Task Id	Task Name	Task Status	Award Number	Document Id	Document Type
View	5694921	Conduct Negotiations	Not Started	N/A	2714351	Application
View	5694490	Notify Recipients	In Progress	N/A	2714322	RFA

Scenario 1: DUNS Number is found in Grants Online

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."

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: 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:

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:

The next four pages are informational only.

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-]
 Other (specify) _____
 Is this application being submitted to other agencies? What other agencies? _____

Use format MM/DD/YYYY for date fields.
 Project Start Date: * 10/01/2019 Project End Date: * 09/30/2023 Submitted Date: _____
 State Received Date: _____ Federal Agency Received Date: * 10/30/2019 Time: * 12:00 PM Eastern
 Applicant Identifier: _____ State Application Identifier: _____ Federal Identifier: _____

Applicant Information
 Legal Name: * Bangor Publishing Company **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: * Tennessee Province: _____
 Country: _____ Zip: _____

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:

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: * 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)
 Street:
 City: County:
 State: * Province:
 Country: Zip:

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.

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

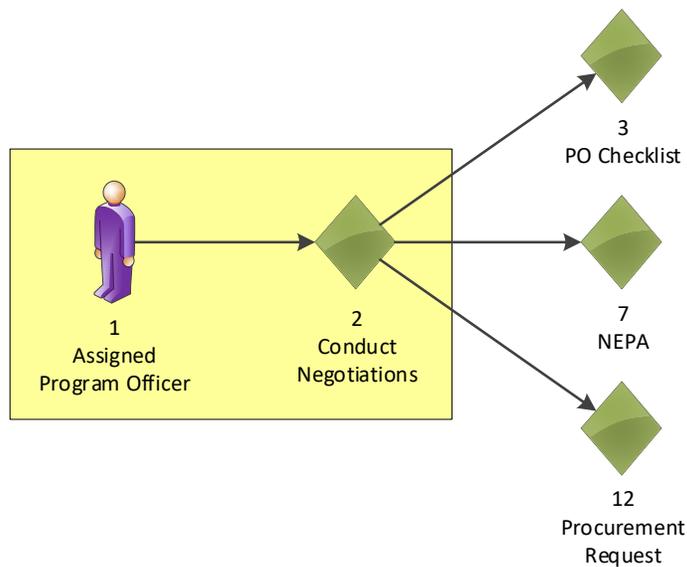
SAM Mailing Address

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	Proposal Number
View	Conduct Negotiations	N/A	02/05/2011	Application	LB Universal2 RFA App	Not Started	2199761	1795527			icmr	LB Univ2 App
View	Notify Recipients	N/A	02/05/2011	RFA	N/A	In	2100760	1705525	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):

Principal Place Of Performance : Applicant's Legal Address [Guidance](#)
 Foreign
 Multi-state
 Statewide
 Countywide
 Citywide
 Zipcode

Note: This section is for the regular SF-424 or for any additional Principal Investigators / Project Directors not listed below

Step 2: Choose the "Non-Construction" radio button.

Step 3: Choose the Principal Place of Performance category, then provide the needed details based upon the selected category.

Authorized Representative

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

Title:

Phone Number: Fax Number:

Email:

Street:

City: County:

State: Province:

Country: Zip:

Please Associate an Authorized Representative within Grants Online for the Organization mentioned above using the Authorized Representative Lookup button.

Authorized Representative Lookup

Step 4: Click the "Authorized Representative Lookup" button. Search by your **studentXX number** in the Last Name field.

Click the "Save" button at the bottom of the screen.

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.

Application Funding Details: *

Total Funding: * 20,000.00

Multi Year Award: No

Fiscal Year	Start Date	End Date	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2020	10/01/2019	09/30/2021	\$10,000.00	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$20,000.00	\$0.00	Edit	Delete

[Add New](#)

Step 5: When applications come in, there will only be one line of funding. In order to make this a multi year award, click the "Add New" link.

Add Application Funding Details

Application Total Funding : 20,000.00

Fiscal Year : * 2022

(use format YYYY)

Funding Start Date : *

(use format MM/DD/YYYY)

10/01/2021

Funding End Date : *

(use format MM/DD/YYYY)

09/30/2022

Federal Funding : *

Program Income :

Applicant Funding :

State Funding :

Local Funding :

Other Funding :

Total Funding :

\$0.00

[Save](#)

[Close](#)

Start Date: **10/01/2021**
End Date: **09/30/2022**
(Both dates are auto-filled)
Funding will be split in half:
Federal Funding: **\$5,000**
Applicant Funding: **\$2,500**
State Funding: **\$2,500**

Application Funding Details: *

Total Funding: * 20,000.00

Multi Year Award: Yes

Fiscal Year	Start Date	End Date	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2020	10/01/2019	09/30/2021	\$10,000.00	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$20,000.00	\$0.00	Edit	Delete
2021	10/01/2020	09/30/2021	\$5,000.00	\$2,500.00	\$2,500.00	\$0.00	\$0.00	\$10,000.00	\$0.00	Edit	Delete

[Add New](#)

Step 6: Now there are two lines of funding, however the total funding is currently at \$30,000. Click the "Edit" link for the 2021 funding and split the funding in half, as per the above screenshot.

Application Funding Details: *

Total Funding: * 20,000.00

Multi Year Award: Yes

Fiscal Year	Start Date	End Date	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2020	10/01/2019	09/30/2021	\$5,000.00	\$2,500.00	\$2,500.00	\$0.00	\$0.00	\$10,000.00	\$0.00	Edit	Delete
2021	10/01/2020	09/30/2021	\$5,000.00	\$2,500.00	\$2,500.00	\$0.00	\$0.00	\$10,000.00	\$0.00	Edit	Delete

[Add New](#)

Once the funding lines are correct, proceed to the next step.

Award Number:

[Generate New Award Number](#)

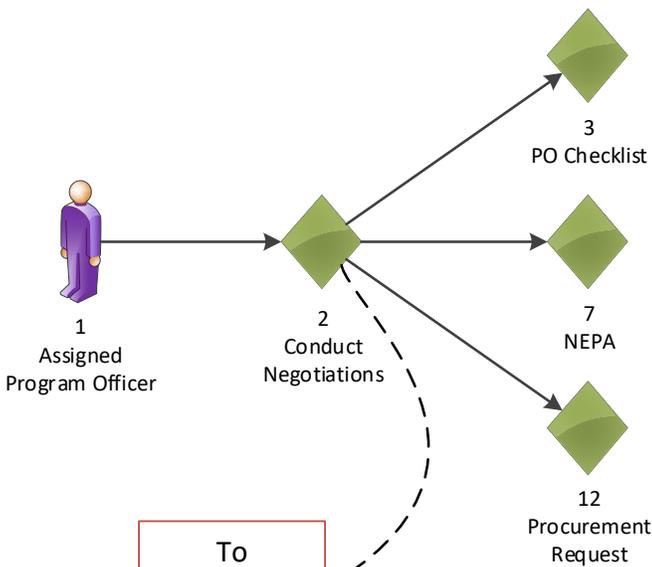
[Associate with Existing Award](#)

[Save](#)

[Save and Return to Main](#)

[Cancel](#)

Step 7: Click the "Generate New Award Number" button. Then click the "Save and Return to Main" button.



No Procurement Request for Zero Dollar Awards

To Provisional Organization Workflow

Step 8: Choose "Negotiations Complete" from the dropdown menu then click the "Submit" button.

Application - NA20GOT9980214

Id: 2853622
Status: ProgramOfficerActions - In Progress

Action:

Your Comments:

(Note: The dropdown menu is open, showing options: Conduct Negotiations, Negotiations Complete, Reassign, Reject, Withdraw. "Negotiations Complete" is highlighted.)

Your Tasks

Document Type: Status:

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	Propos Number
View	Procurement Request and Commitment of Funds	NA11GOT9990039	02/02/2011	Procurement Request and Commitment of Funds	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:

Your Comments:

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	2245448	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 and Task link 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.)
- For a detailed discussion of the rules associated with *Principal Place of Performance*, please refer to the following training manual: https://www.noaa.gov/sites/default/files/atoms/files/PPPER_Quick_Reference_Guide.pdf

This completes the hands on activity for this Module.

Please complete the assessment questions for this Module.

Then you can proceed with the Award File in the next module.



Grants Online Training

Award File: NEPA & PO Checklist Processing

Module #07

February 2021

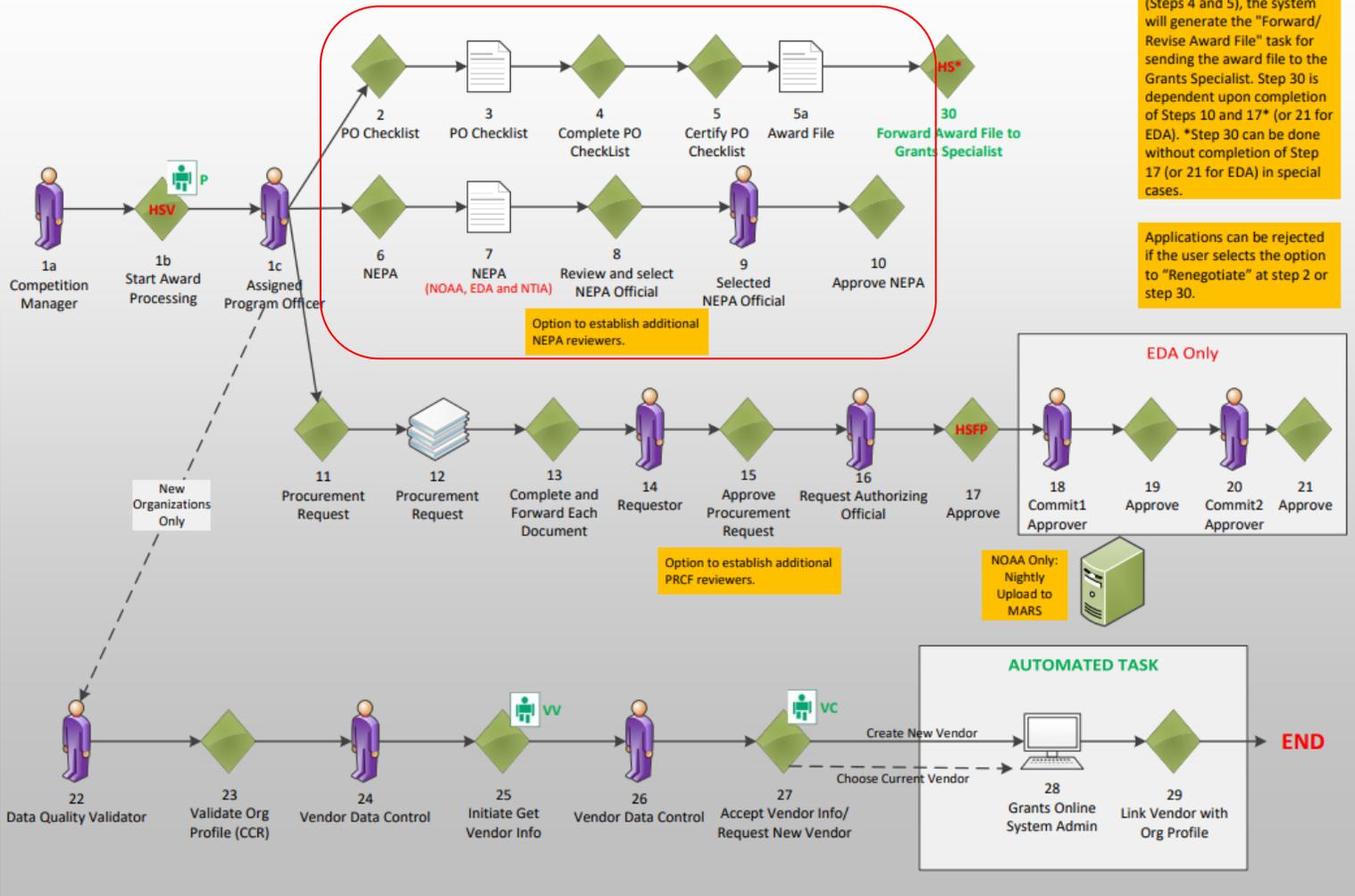
Competitive Process – Start Award Processing

Start Award Processing Overview (COMP-4)

August 19, 2019

Version 4.28

* 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.

Corresponding Video

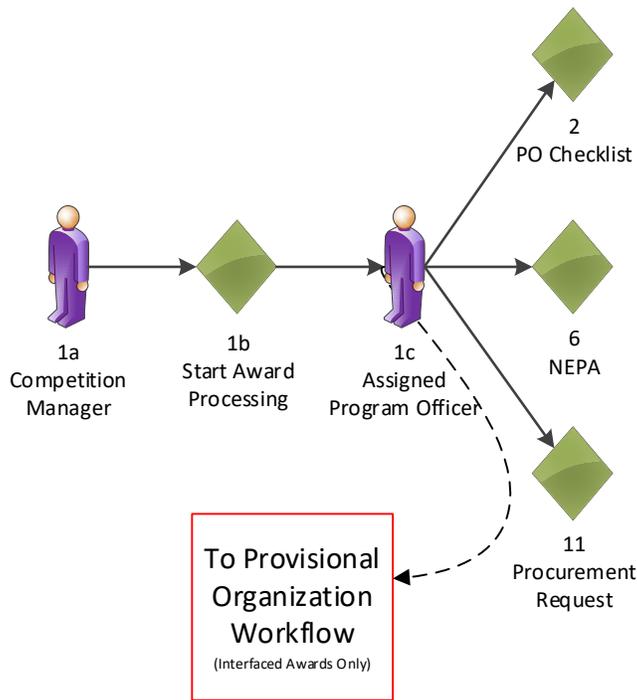
Hands on activity for this Module starts here.
You will be completing steps 2 – 10.

To begin, access the [Grants Online Training](#) site.

The gstudent account represents a Certified Federal Program Officer.
Sign in with your **gstudentXX** account.
The password is **gotremfeb21XX\$\$**.
Note: XX is your Student Number.

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	Propos Number
View	Procurement Request and Commitment of Funds	NA11GOT9990039	02/02/2011	Procurement Request and Commitment of Funds	Test/Training App 1 for Not Release 4.06 Comp RFA	Not Started	2199722	1795342			Institute for Community Managed Resources (ICMR)	LB Test App 1
View	NEPA Document	NA11GOT9990039	02/02/2011	NEPA	Test/Training App 1 for 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	Not Started	2199723	1795340			Institute for Community Managed Resources (ICMR)	LB Test App 1
View	Assign Award Number/Recipient	N/A	01/04/2011	Application	Test App for 4.05 Process Maps	In Progress	2199526	1794572	01/25/2011		Institute for Community	LB - Test App 1

Award File In Progress - NA12GOT9990022

Id: 2245442
Status:

Action: [Submit](#)

Your Comments:

[Spell check](#)

[Save Comment](#)

[Print Award File History](#)

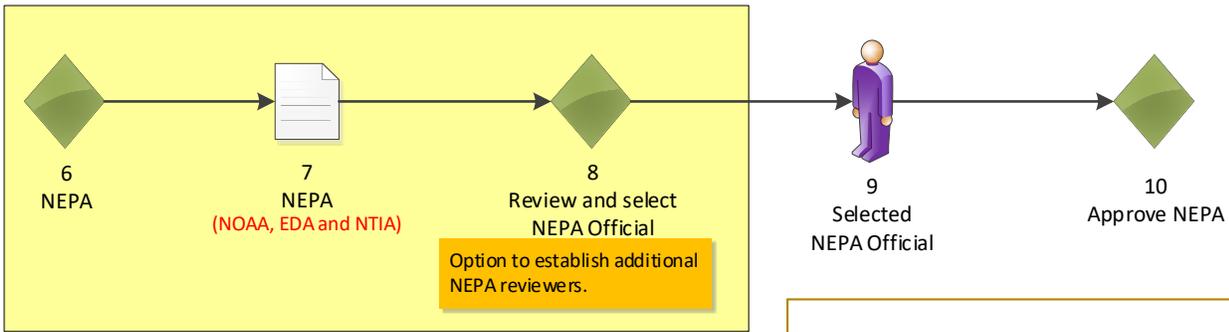
Attachments:

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 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 and Task link 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.)



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 record 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 under 40 CFR 1508.4).
<input type="checkbox"/> 6.03b.3	Examples of Restoration Actions Eligible for a CE

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

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

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:

- S

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

For Level of Review, choose the “Categorical Exclusion” radio button. Then choose any categorical exclusion from the list.

For the next three items, leave these with the default response.

Choose “NOAA Official” from the NEPA Official dropdown list.

Then click the “Save and Return to Main” button.

On the following screen, choose “Forward to NEPA Official.”

NOAA, NTIA, and EDA ONLY

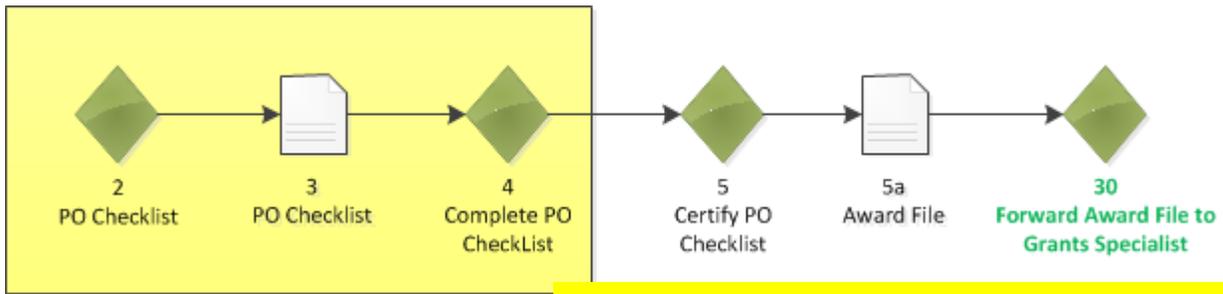
From the Action dropdown menu, choose **Complete NEPA Document** and click the **Submit** button. The NEPA Details screen displays four questions for which the user must provide a response. After responding to the questions, add any relevant attachments and identify the NEPA Official who will perform 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.noaa.gov/organization/information-technology/guidance-for-national-environmental-policy-act-nepa>



PO Checklist - NA20GOT9980016

Attachments:
No attachments.
Add new Attachment: [+]
Any changes to information on this page should be saved before adding.
[Large File Guidance](#)

General Award Information
Application Organization: [GENERAL ATOMICS](#) State: CA
Applicant's EIN and DUNS numbers have been verified: *

Grant Type * [Guidance](#)
 Grant
 Cooperative Agreement
If Cooperative Agreement, enter [Cooperative Agreement Specific Award](#)

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).

General Award Information: Confirm that the EIN and DUNS have been verified by checking the checkbox.

Grant Type: Choose Grant.

Statutory Authority: Pick up the Statutory Authority related to your CFDA Number from the SAM.gov website. Enter a CFDA Number in the All Award Data search field.

Project Description: This information should be understood by the general public.

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 Special Purpose" awards). No final report required. Final report selection is required for all other awards.
 Not Required (for Single Year awards). One report, covers award period up to 12 months and is required.

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

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

Project Progress Reporting Comments:

Note: It is the Program Officer's responsibility to create the Specific Award Condition for non-default awards and the above values will be ruled in favor of the Specific Award Condition. If no Specific Award Condition is entered, the award will require the default values as defined for the Agency in the Bureau (or Department) Standard Award Condition.

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 merit review and/or selection process?
 NO YES
If YES, please attach files below.

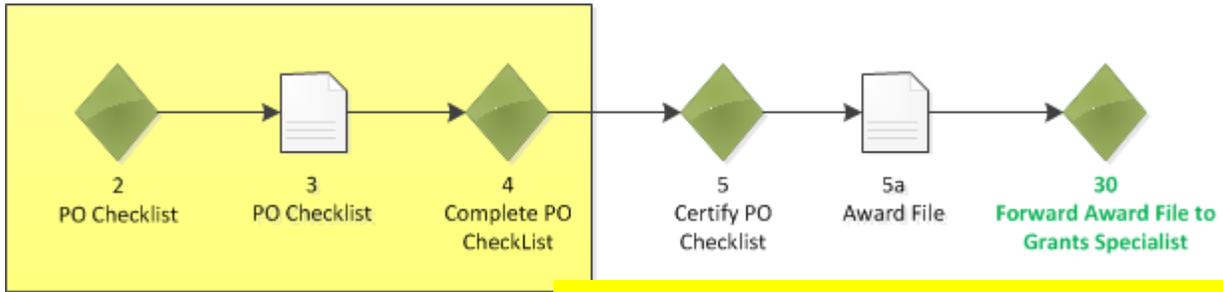
Basis of Selection: Choose Non-Competitive.

Project Progress Reports Frequency: Choose Synchronized to the Federal Financial Report.

Final Report: Leave Bureau default.

Add a Specific Award Condition.

Project Progress Reporting Comments: Add comment.



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
\$500,000.00	\$0.00	0.0	Source or Explanation of 0% Required Cost Share

[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:
 Leave defaults.

Transfer Information: Leave default.

Programmatic Specific Award Condition: Choose "Yes".
 Add a Specific Award Condition.
 Create from scratch.
 Name: "Permit Required."

NOAA Specific Information:
 Leave defaults. For Other, choose "Yes".

On the following screen, choose "Certify PO Checklist."

Matching Requirements: Click Add New link and indicate a 50% match required.

Minority Serving Institution: Leave default.

HSPD-12: Leave default.

Research Terms & Conditions: Choose "Yes".

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 [Specific Award Condition](#)

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 Specific 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
[Specific 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 addresses:

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 on required through the time span of Amendment 1, then both Sections 306 and 308 must be selected as YES in the Amendment

CESU Awards

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

Justification

Other

Past Performance Acceptable? NO YES Not Answered

Comments

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

[Cooperative Agreement Specific Award Condition](#)

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

This completes the hands on activity for this Module.

Please complete the assessment questions for this Module.

Then you can proceed with the Award File: Procurement Request and Commitment of Funds in the next module.



Grants Online Training

Award File: Procurement Request & Commitment of Funds

Module #08

February 2021

Competitive Process – Start Award Processing

Start Award Processing Overview (COMP-4)

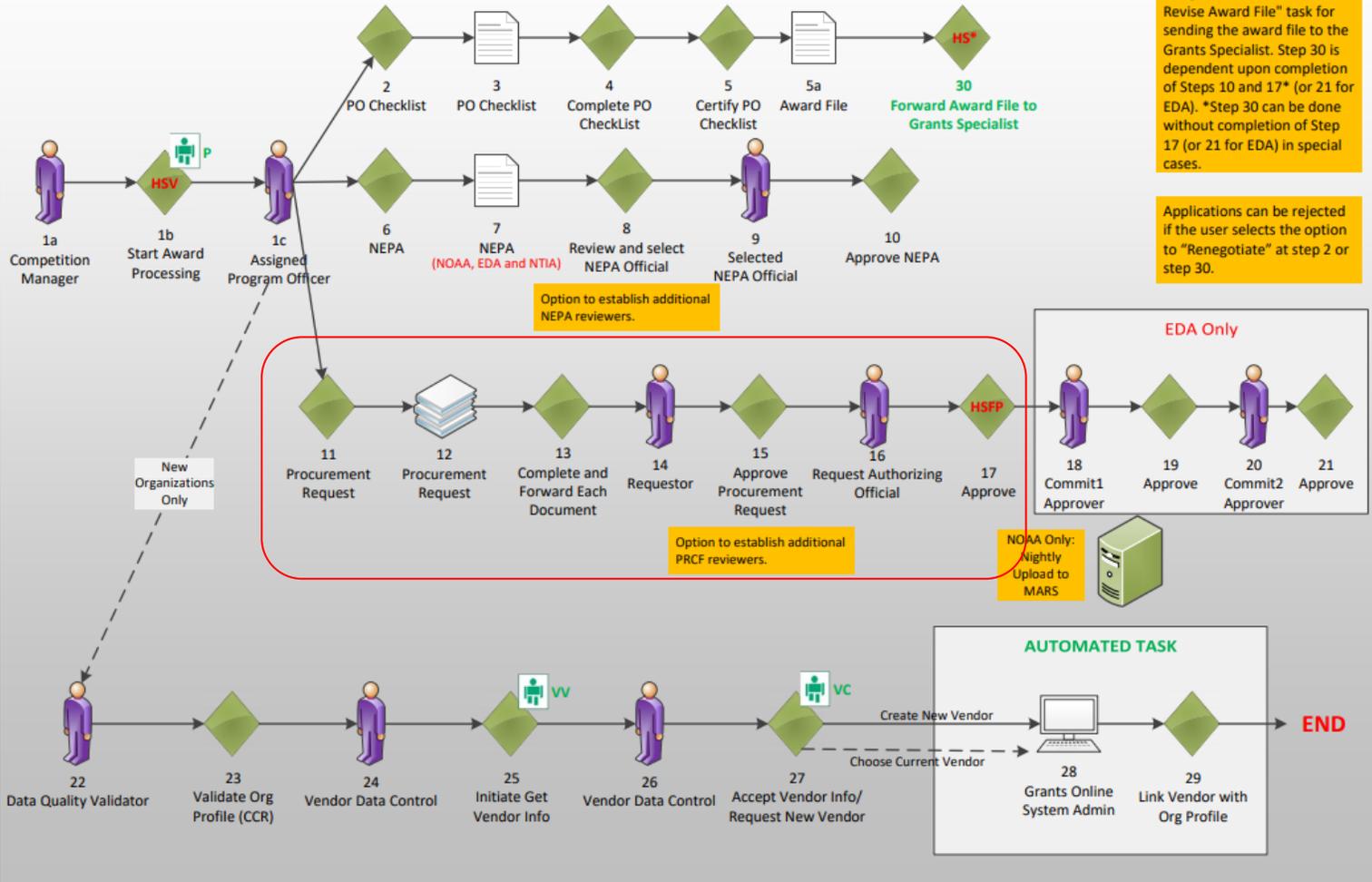
August 19, 2019

Version 4.28

* 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.



Corresponding Video

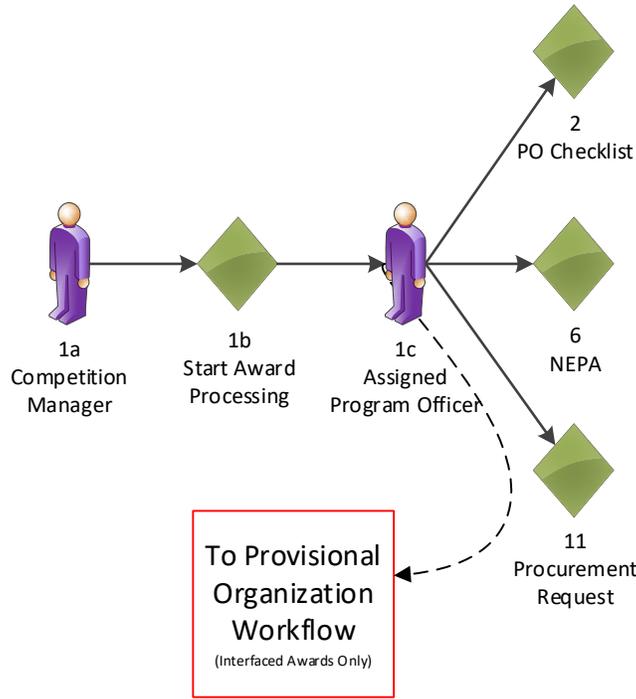
Hands on activity for this Module starts here.
You will be completing steps 11 – 17.

To begin, access the [Grants Online Training](#) site.

The gstudent account represents a Certified Federal Program Officer.
Sign in with your **gstudentXX** account.
The password is **gotremfeb21XX\$\$**.
Note: XX is your Student Number.

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	Propos Number
View	Procurement Request and Commitment of Funds	NA11GOT9990039	02/02/2011	Procurement Request and Commitment of Funds	Test/Training App 1 for Not Release 4.06 Comp RFA	Not Started	2199722	1795342			Institute for Community Managed Resources (ICMR)	LB Test App 1
View	NEPA Document	NA11GOT9990039	02/02/2011	NEPA	Test/Training App 1 for 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](#)

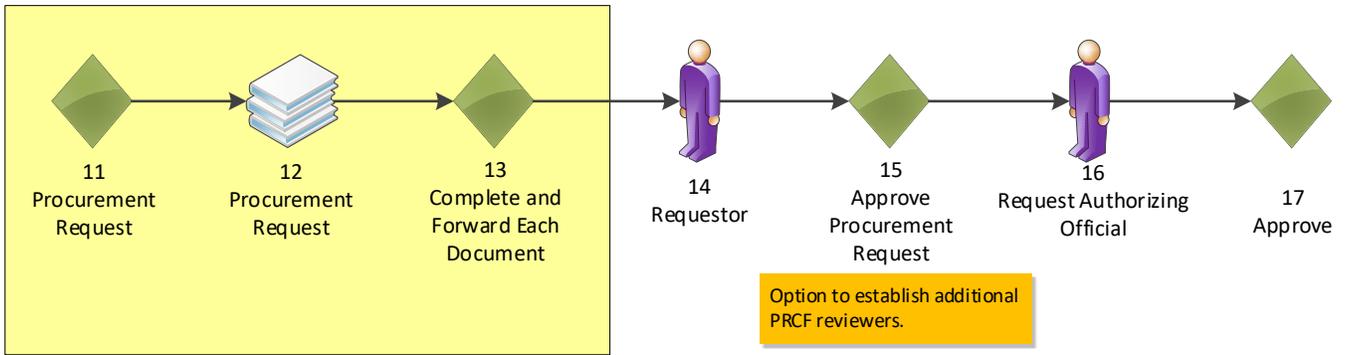
Attachments:

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
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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.
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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](#)

Federal Share: * \$ 500,000.00 Requisition Number: *

Affected Reference Number: NA16NMF4130006 EIN: 987654321 DUNS: 123456789

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

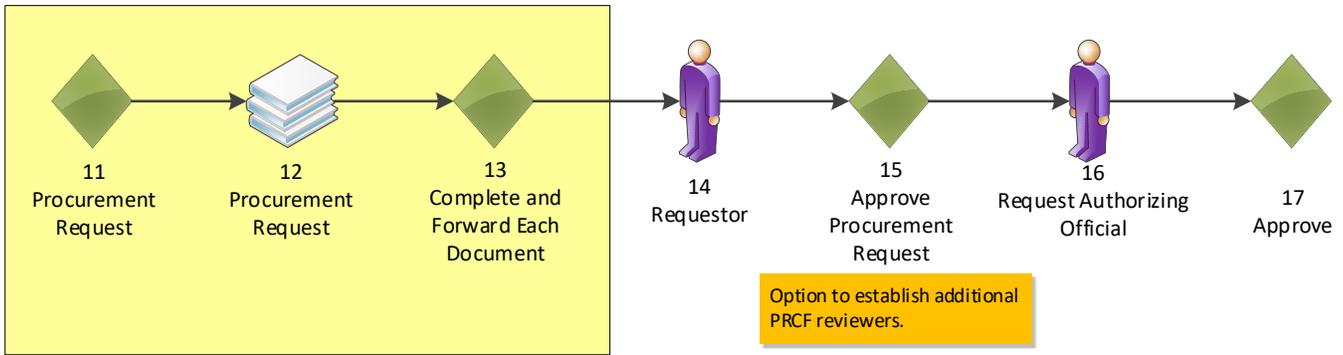
Description: *
CFDA Number: 11.413
Project Start Date: 2015-10-01
Project End Date: 2019-09-30
Grant Type: not entered
Project Description: Training App 1

Enter “**Official**” in the Last Name field.
Then choose “NOAA Official”.

Use your **XX** number in the Last Name field.

Automatically filled in after the Authorizing Official and Requestor have been selected

Click the “**Add New ACCS Line**” link.



Step 1 – Bureau: Leave as 14.
Fiscal Year: This can be changed by the FPO to use Prior Year Funds. For class leave this as “2021”.

The ACCS is valid

Validated: true

Bureau (xx): * 14

Fund (xx): * 1

Fiscal Year (yyyy): * 2019

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: [Select Descriptor](#) Fund Type: X

Amount: * \$800.00 Prior Year Fund: No

Save DWValidate Cancel/Done

Add New ACCS Line

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task
14	1	2019	30-31-0002-00-00-00-00	02-21-16-001	28LEF29-P00

Step 2 – Project: Enter 28LEF29.
Task: Enter P00.

Step 3 – Organization: Enter 30-31-0002

Step 4 – Object Class: Enter 41-11-00-00

Step 5 – Amount: Enter \$5,000.

Step 6 – Click the “Save” button.

Step 7 – Click the “DWValidate” button.
 Validated should change to “True”.
 Additionally, the Program Code will be automatically populated.

Step 8 – Unique Account Descriptor: Click the “Select Descriptor” link.

Step 9 – Choose a descriptor by clicking the “Select” link.

Step 10 – Click the “Cancel/Done” button.
 Advance 5 pages to Step 11.

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 following training manual:
https://www.noaa.gov/sites/default/files/atoms/files/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	20-01-0000-00-00-00-00	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

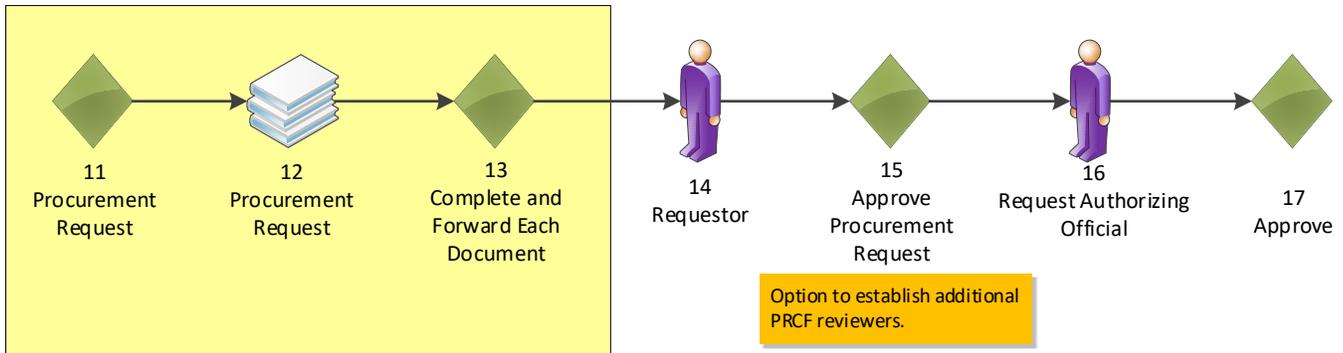
Bureau (xx): * 14
Fund (xx): * 1
Fiscal Year (yyyy): * 2015
Project - Task: * 28LEF29 - P00
Program Code: 02 - 21 - 16 - 001
Organization: * 30 - 31 - 0002 - 00 - 00 - 00 - 00
Object Class: * 41 - 11 - 00 - 00
Unique Account Descriptor: NEW DESCRIPTOR [Select Descriptor](#) Fund Type: X
Amount: * \$250.00 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	30-31-0002-00-00-00-00	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](#)

Step 11 – Click the “CBSValidate” button. Then click the “Save and Return to Main” button.

CBS Result

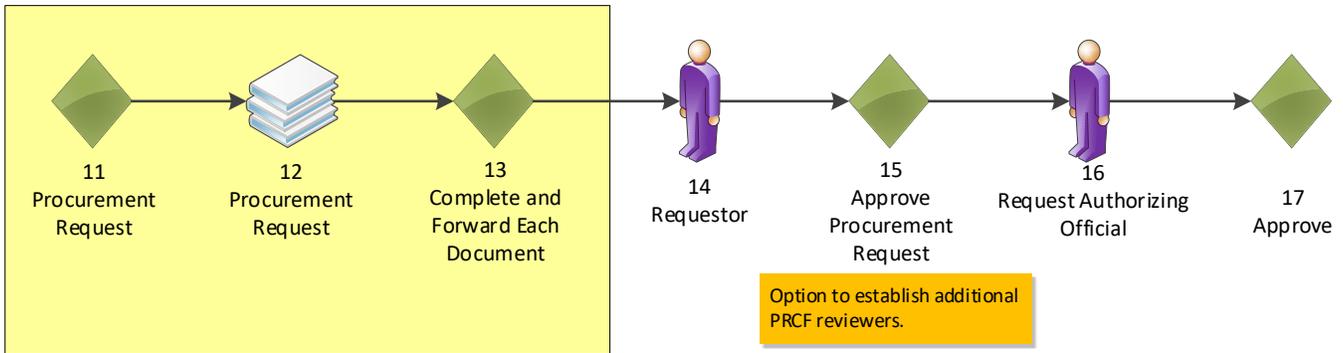
Vendor Validation ; Sl.No 1; VendNo 90600;VendId 1;Tin 205533272;Duns 602201043;Active Y;
 Item_No 001; Line_No 1; CD435_ACCS_ID 2025511;
 Error - Org4 0; Invalid or inactive Org 4 Code;
 Item_No 001; Line_No 1; CD435_ACCS_ID 2025511;
 Error - Can not find the mask in FM001 -13-14-SAE0000-10-01-0005-00-00-00-0041-11-00-00;

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.



Procurement Request and Commitment of Funds - ED20DEN3330007

Id: 2849751
Status: ProgramOfficerActions - In Progress

Action:

Your Comments:
 Complete Procurement Request and Commitment of Funds
 Forward Procurement Request to Requestor

Choose “Forward Procurement Request to Requestor” from the dropdown menu and click the “Submit” button.

Your Tasks

Document Type: Status:

8 items found, displaying all items.1

View	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date	Completed Date	Award Number
View	6796316	Review Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2854539			ED20DEN3330046
View	6796315	Forward/Revise Award File	Not Started	Award File	2854537			ED20DEN3330046

From Your Tasks, Approve the Procurement Request and Commitment of Funds task.

Then click “View” for the Forward/Revise Award File task.

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:

Your Comments:

- Forward Award File to Grants Specialist without PRCF
- Reassign Award File
- Renegotiate
- Revise NEPA Document
- Revise PO Checklist
- View FAIS Sheet
- View Reporting Frequencies

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.

Training staff will be monitoring the workflow and will complete the needed approvals.

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.

Once you have a green check mark on the Award File in Progress page, choose *“Forward Award File to Grants Specialist.”*

- 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.

This completes the hands on activity for this Module.
Please complete the assessment questions for this Module.
Then you can proceed with the next module.

Grants Management Process

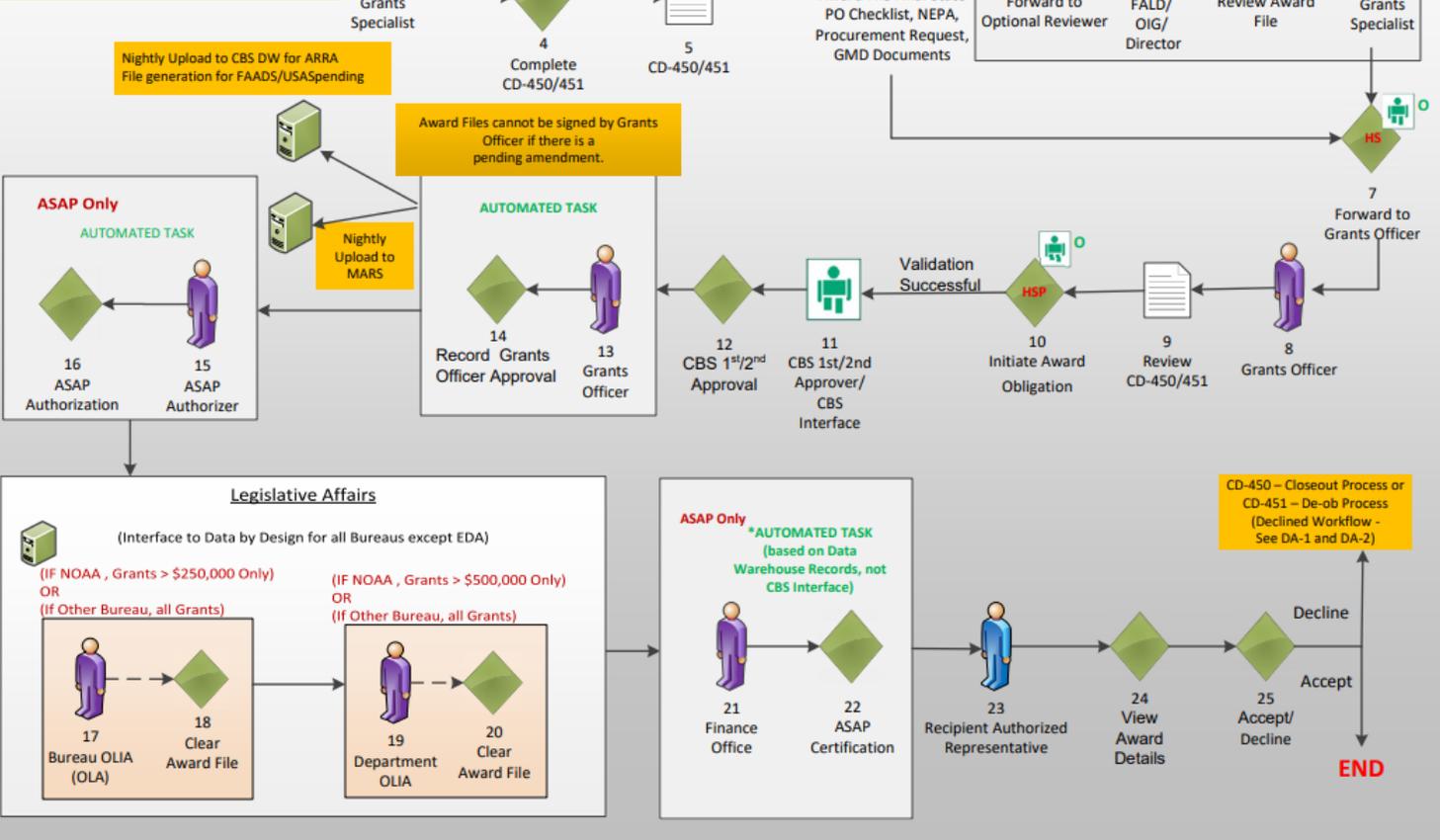
GMD Review, Obligation, Approval and Award Offer (GMD-1)

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)



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.

(No Comments)

Financial Assistance Award			
Recipient Name:	University of Maryland, Center for Environmental Science	Federal Share of Cost:	\$50.00
Street Address:	2020 Horns Pint Rd	Recipient Share of Cost:	\$0.00
City, State, Zip:	Cambridge, MD 21613-3368	Project Title:	Do Not Pay Screenshot
CFDA Number:	11.433	Award Number:	NA15NMF4330041
		Total Estimated Cost:	\$50.00
		Award Period:	09/01/2015 - 09/30/2016

Internal Use Only
 ASAP Authorize Amount: \$50.00 Prior Year Fund: No DoNotPay List Checked

CD-450 Items

<input type="checkbox"/> Department of Commerce Financial Assistance Standard Terms and Conditions(DECEMBER 2014)	Required
<input type="checkbox"/> R & D Award	Not Allowed
<input type="checkbox"/> Federal-Wide Research Terms and Conditions,as adopted by The Dept.Of Commerce	Not Allowed
<input checked="" type="checkbox"/> Bureau Specific Administrative Standard Award Conditions	Required
<input checked="" type="checkbox"/> Award Specific Special Award Conditions	Required
<input type="checkbox"/> Line Item Budget (Attach File)	Required
<input type="checkbox"/> 2 CFR Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements as Adopted Pursuant to 2 CFR § 1327.101	Required
<input type="checkbox"/> 48 CFR Part 31, Contract Cost Principles and Procedures	Required
<input type="checkbox"/> Department of Commerce Pre-Award Notification Requirements for Grants and Cooperative Agreements (REF:79 FR 78390 DECEMBER 30, 2014)	Required

GMD Checklist - NA15NMF4330041

Attachments:

No attachments.

Add new Attachment: [+]

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



(No Comments) - Comments

Checklist Items

Not Required	<input type="checkbox"/> Budget/Cost Analysis Memo
As Needed	<input type="checkbox"/> Intergovernmental Review of Federal Program
Applicants Management and Financial Capabilities	
As Needed	<input type="checkbox"/> Credit Check
Required	<input type="checkbox"/> Delinquent Federal Debt
Required	<input type="checkbox"/> Single Audit
Required	<input type="checkbox"/> List of Parties excluded from Procurement/Non-Procurement Activities
Required	<input type="checkbox"/> Past Performance
Not Required	<input type="checkbox"/> Pre-Award Accounting System Survey
As Needed	<input type="checkbox"/> High Risk Recipient
Not Required	<input type="checkbox"/> Awards to Insular Area Yes No <input checked="" type="radio"/> Not Answered
Required	<input type="checkbox"/> Grant Type <input type="radio"/> Cooperative Agreement <input checked="" type="radio"/> Grant
Required	<input type="checkbox"/> Confirm Financial and Progress Report Requirements
Required	<input type="checkbox"/> Review Special Award Conditions
Required	<input type="checkbox"/> Project Details
Required	<input type="checkbox"/> Statutory Authority
Required	<input type="checkbox"/> Project Dates

DoNotPay check is complete

[View/Manage Recipient Organization](#)

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

University of Maryland, Center for Environmental Science

[Edit >>](#)



(No Comments) Internal Comments

Note: These comments are for internal use only.

Audit Trail:

Description

Grants Online Bureau
 Grants Online Org ID
 Organization Type
 Applicant Type

1000002 - National Oceanic and Atmospheric Administration (NOAA)

1005041

External All
 Public/State Controlled Institution of Higher Education

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

Award File 0 - CB16ADR0160002

ID: 2602566
Status: GrantsOfficerActions - In Progress

Action:

Your Comments:

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

- Workflow History

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

Export options: Excel

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

- Workflow History

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

Export options: Excel

Attachments:

Pending Actions 

4 items found, displaying all items.

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

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

Non Interfaced Bureaus

Procurement Request and Commitment of Funds - CB16ADR0160002

Id: 2602567
Status: Approved: CAMSFirstApproverActions - Not Started

Action: CBS First Approval Complete

Your Comments: Please select an action

CBS First Approval Complete
Return CD-435 for Revision - Insufficient Funds
Review Procurement Request

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

Award File 0 - CS16RAM0160002

Id: 2602370
Status: Approved: OLAActions - In Progress

Action: Please select an action

Your Comments: Please select an action

Clear Award File
Forward to OLIA
Hold Award File
Review Award File
Send to GNS
View FAIS Sheet
View Reporting Frequencies

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



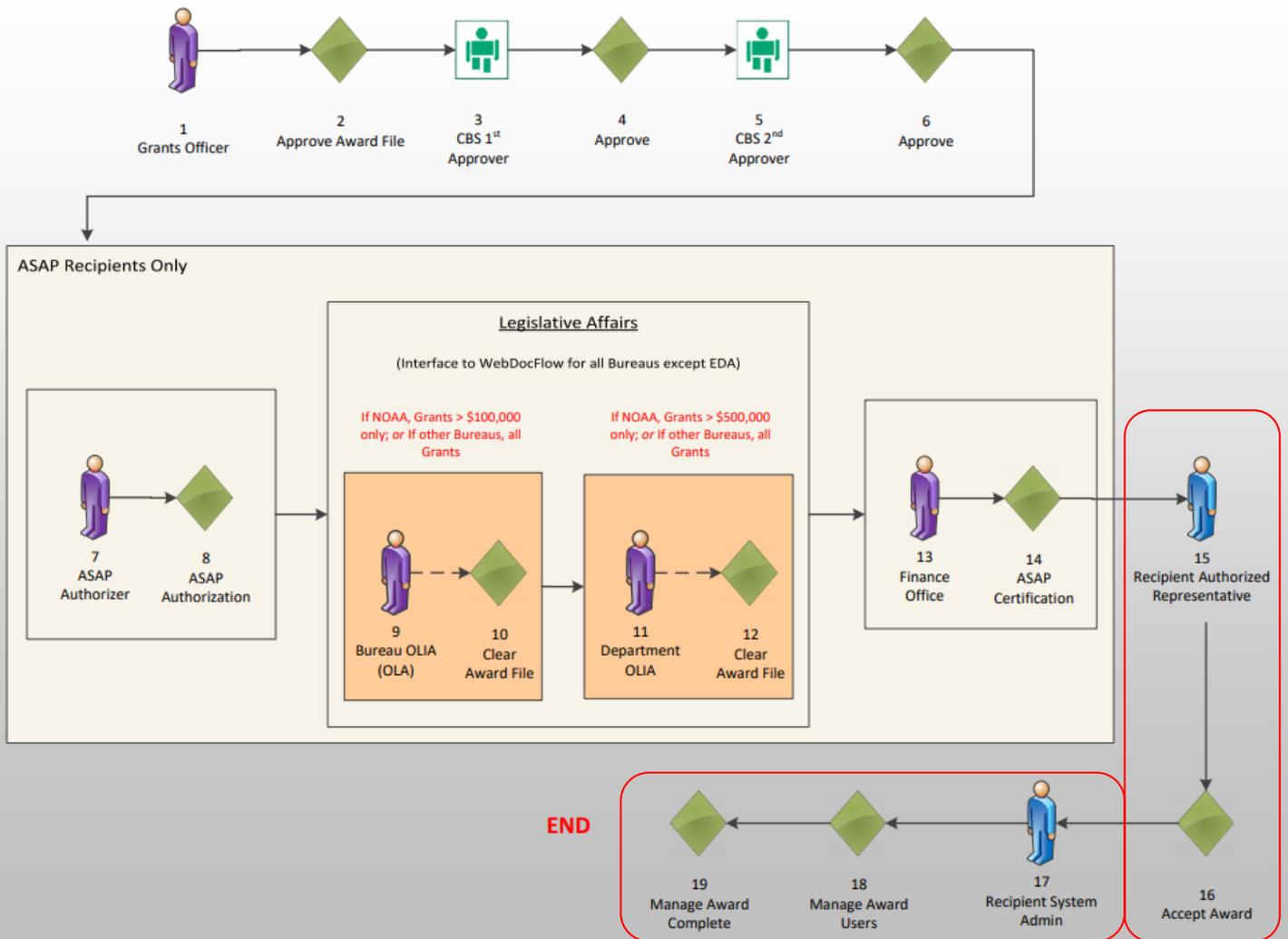
Grants Online Training

Recipient Acceptance of Award

Module #09

February 2021

Recipient Acceptance of Award



[Corresponding Video](#)

There are no hands on activities for this module.

Please complete the assessment questions for this Module.

Post Award Activities

For all Post Award activities, please use the following Award Numbers based on your Student Number:

STUDENT #	POST-AWARD #
01	NA20GOT9980191
02	NA20GOT9980192
03	NA20GOT9980193
04	NA20GOT9980194
05	NA20GOT9980195
06	NA20GOT9980196
07	NA20GOT9980197
08	NA20GOT9980198
09	NA20GOT9980199
10	NA20GOT9980200
11	NA20GOT9980201
12	NA20GOT9980202
13	NA20GOT9980203
14	NA20GOT9980204
15	NA20GOT9980205
16	NA20GOT9980206
17	NA20GOT9980207



Grants Online Training

Award Action Request Processing

Module #10

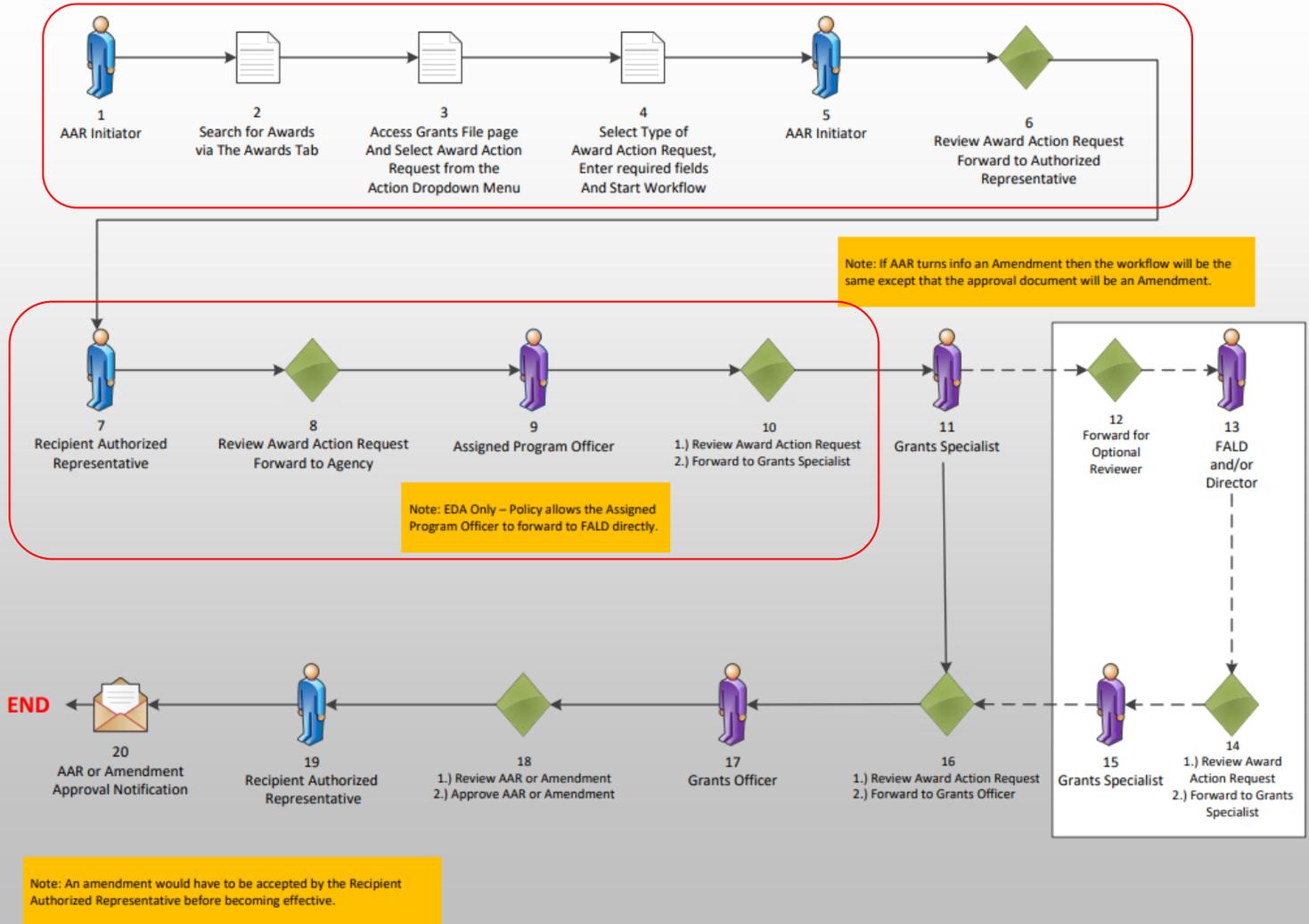
February 2021

Award Action Request (AAR)

Award Action Request Workflow (AAR-1)

October 9, 2018

Version 4.25



[Corresponding Video](#)

Hands on activity for this Module starts here.
You will be completing steps 1 – 10.

To begin, access the [Grants Online Training](#) site.

The arep account represents a Recipient.
Sign in with your **arepXX** account.
The password is **gotremfeb21XX\$\$**.
Note: XX is your Student Number.

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.noaa.gov/sites/default/files/atoms/files/Recipient_AAR_Help.pdf

Step 1 - Click on the “Award” tab at the top of the page.

Step 2 - Use the Search Award feature to search for your assigned **POST AWARD - Award Number**.

Step 3 - Click on the award number in the search results to get to the Grants File.

Step 4 - From the Grants File dropdown choose the option to “*Create Award Action Request*”.

Step 5 – From the Index page, you may select any one or two to complete.

Step 6 – Complete the form for the selected AAR and then “*Forward to Agency*”.

Step 7 – Log off as the recipient and log back on as the Project Officer using your **gstudentXX** account. Review the AAR and then forward it to the next person in the workflow. Once the task is out of your inbox you have completed this hands-on exercise.

Please complete the assessment questions for this Module.



Grants Online Training

Performance Progress Report & Federal Financial Report Processing

Module #11

February 2021

Performance Progress Report (PPR)

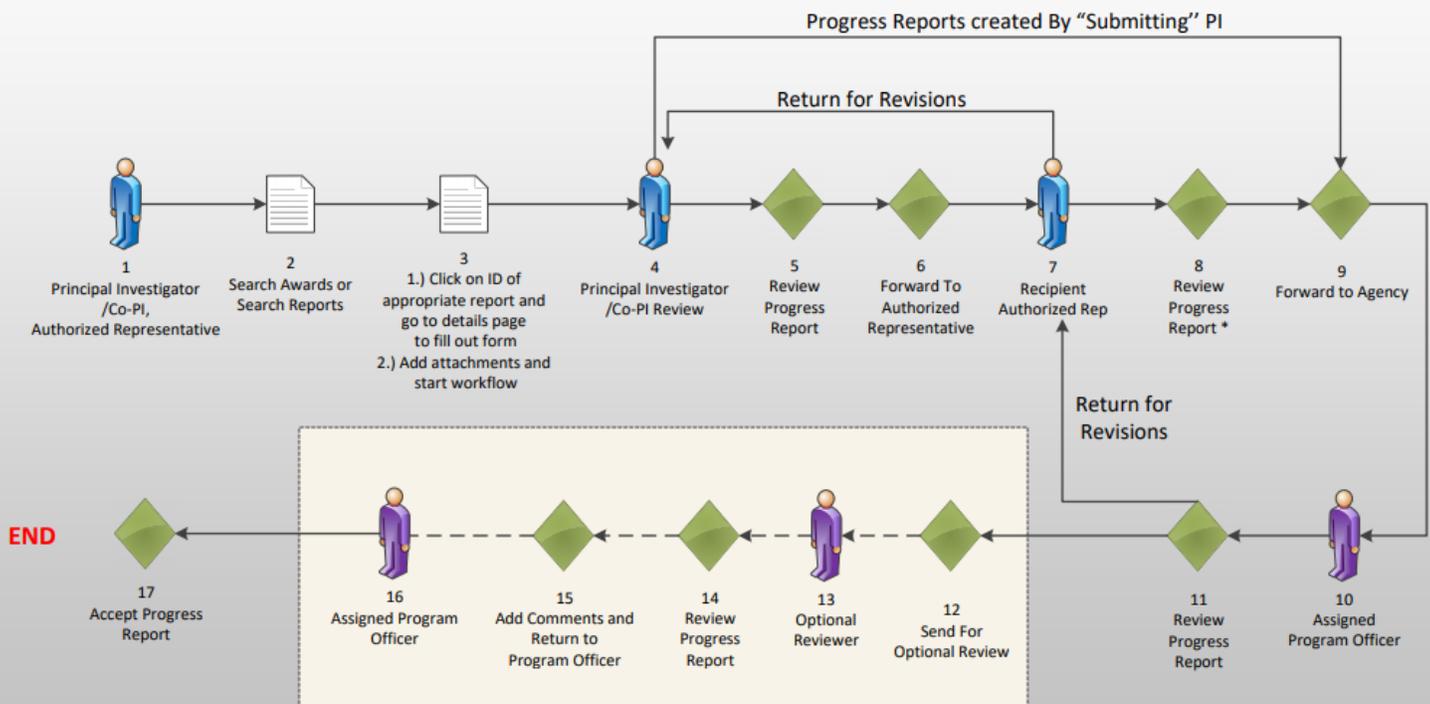
Routing of Performance Progress Report (PPR-1)

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.



[Corresponding Video](#)

Hands on activity for this Module starts here.

To begin, access the [Grants Online Training](#) site.

The arep account represents a Recipient.

Sign in with your **arepXX** account.

The password is **gotremfeb21XX\$\$**.

Note: XX is your Student Number.

Performance Progress Report (PPR)

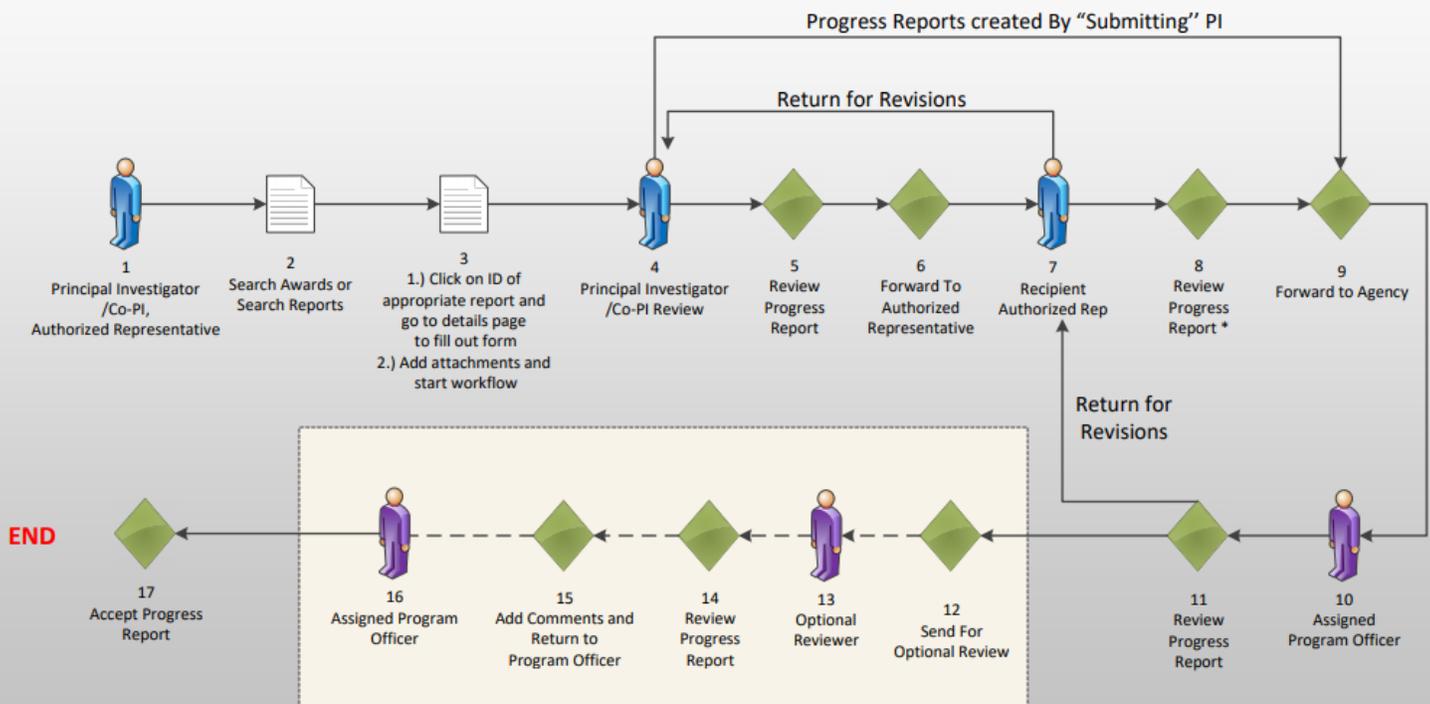
Routing of Performance Progress Report (PPR-1)

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.



Step 1 - Click on the "Award" tab at the top of the page.

Step 2 - Use the Search Award feature to search for your assigned **POST AWARD - Award Number**.

Step 3 - Complete one Performance Progress Report (PPR) as the recipient and forward to the agency.

Step 4 - Log off as the recipient and log back on as the FPO using your **gstudentXX** account. Review the PPR and accept it.

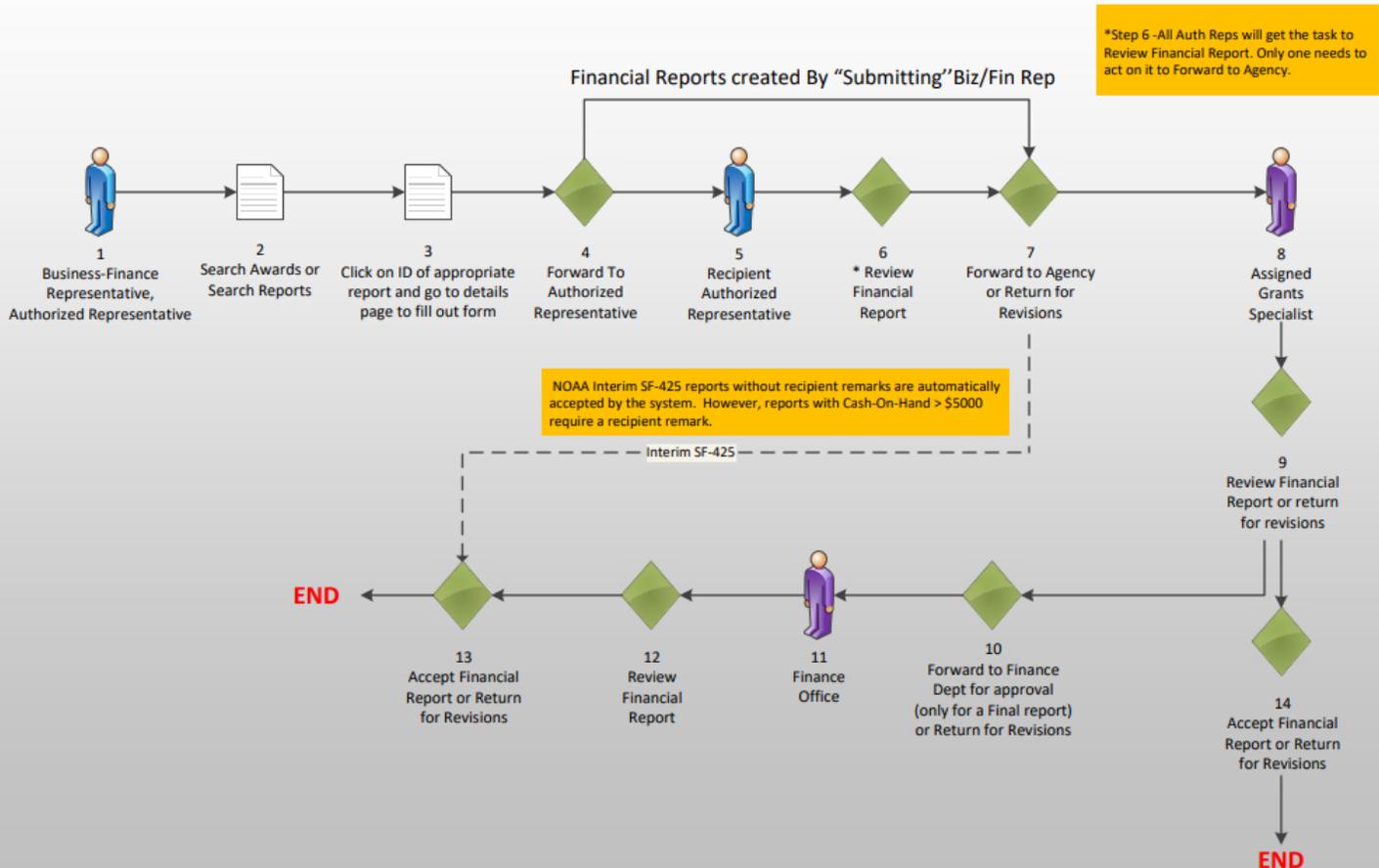
Federal Financial Report (FFR #1)

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.

Step 1 - Sign in with your **arepXX** account. Click on the "Award" tab at the top of the page.

Step 2 - Use the Search Award feature to search for your assigned **POST AWARD - Award Number**.

Note: If searching for the SF-425 using "Search Reports" you must be sure to check the box to "Include reports with no Start Date."

Step 3 - Complete one Federal Financial Progress Report (FFR) as the recipient and forward to the agency.

Please complete the assessment questions for this Module.

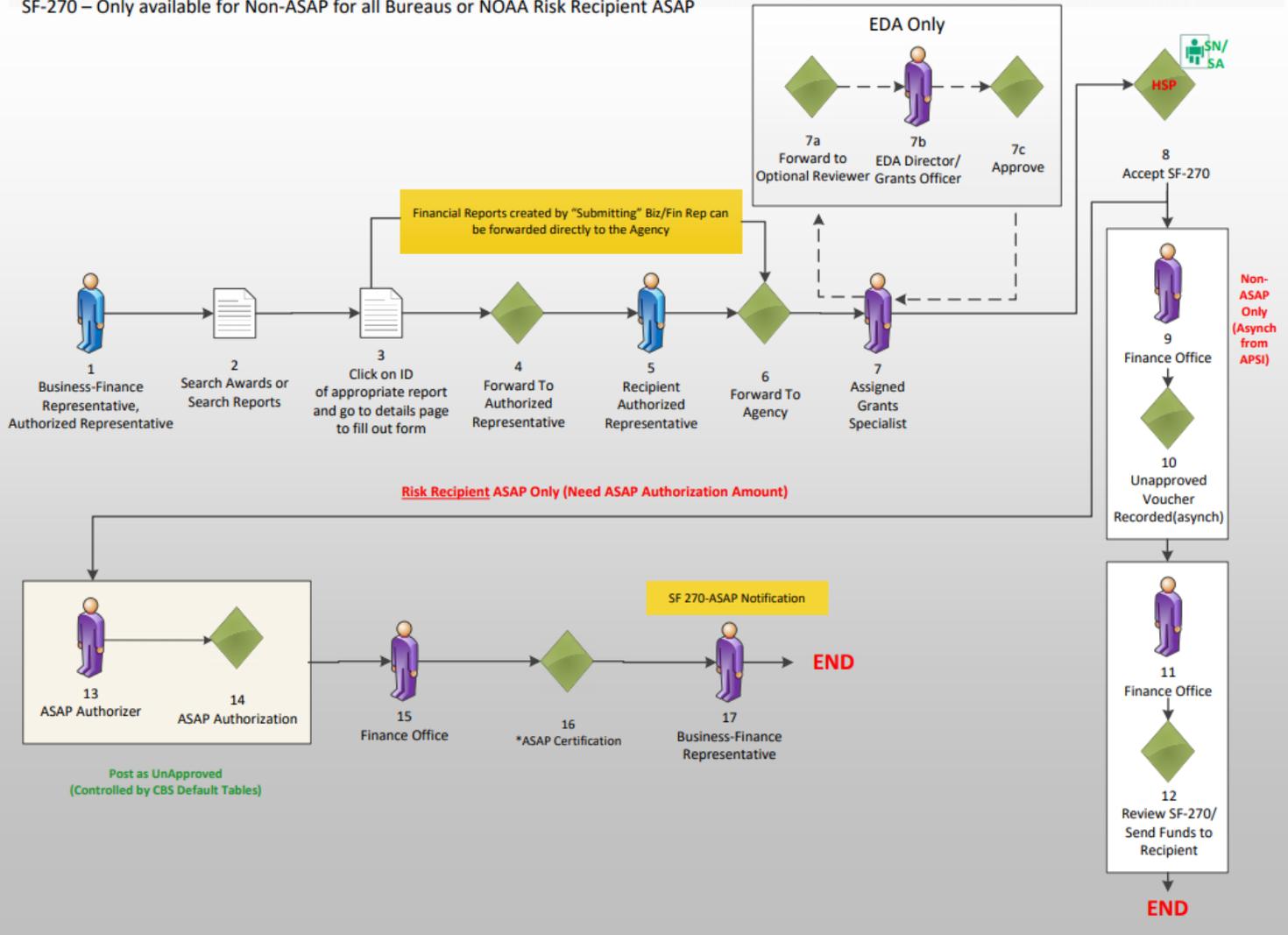
Federal Financial Report (FFR #2)

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





Grants Online Training

Partial Funding Processing

Module #12

February 2021

FPO – Partial Funding Steps 1 – 3

Search for your assigned **POST AWARD - Award Number.**

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:

DBA Name:

Project Title:

Award Status:

PI-PD Last Name:

Supplementary Information Category:

Supplementary Value:

Search **Reset**

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

23 items found, displaying all items.1

Award Number	Org ID	Recipient Name	DBA Name	Project Title	Award Status	Principal Investigators-Project Directors
NA20GOT9980017	2004893	GENERAL ATOMICS		gstudent16	Accepted	None Designated
NA20GOT9980007	2004893	GENERAL ATOMICS		GSTUDENT00 - Instructor App for Comp Process Dec 2...	Accepted	Arthur Rep00
NA20GOT9980006	2004893	GENERAL ATOMICS		GStudent15	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 - NA20GOT9980007

Id: 2845241
Status: Accepted

Action: **Submit**

Your Comments:

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

Save Comment

FPO – Partial Funding Steps 4 and 5

Partial Funding -- NA20GOT9980007

Memo * [Guidance](#)

[Spell Check](#)

Approved Plan and Prior Obligations

+	Action	Application ID	Project Title
	Select	2845190	GSTUDENT00 - Instructor App for Comp Process Dec 2019 Class2000

Selected Application

None

[Cancel](#)

- 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	2845190	GSTUDENT00 - Instructor App for Comp Process Dec 2019 Class2000

Planned Year	Approved Fed Share	Obligated	Approved Non-Fed Share	Assigned Non-Fed Share
2020	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00
2021	\$4,000.00	\$0.00	\$4,000.00	\$0.00

FPO – Partial Funding Step 6

SF-425 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: 12/29/2021

Closeout Date: N/A

PIs - PDs: Arthur Rep00

Partial Funding -- NA20GOT9980007

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.

6. 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 -- NA20GOT9980007

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.

156 / 4000 [Spell Check](#)

Approved Plan and Prior Obligations

Action	Application ID	Project Title
Select	2845190	GSTUDENT00 - Instructor App for Comp Process Dec 2019 Class2000

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	MD No.	Project Title
2845190	\$8,000.00	\$4,000.00	\$0.00	2,500	\$8,000.00	\$4,000.00	\$4,000.00			GSTUDENT00 - Instructor App for Comp Process Dec 2019 Class2000

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](#)

Federal Add Amount and Non-Fed Amount - \$1,000.

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

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: [Apply Filter >>](#)

5 items found, displaying all items: 1

View	Task Received Date	Project Title	Document Id	Task Name	Award Number	Task Id	Task Status	Document Type
View	02/03/2020	GSTUDENT00 - Instructor App for Comp Process Dec 2019 Class2000	2845614	Procurement Request and Commitment of Funds	NA20GOT9980007	6781194	Not Started	Procurement Request and Commitment of Funds
View	02/03/2020	GSTUDENT00 - Instructor App for Comp Process Dec 2019 Class2000	2845613	Review Release of Funds	NA20GOT9980007	6781193	Not Started	Award File

Fill out the Procurement Request:
Request Authorizing Official: Enter **“Official”** in the Last Name field. Then choose **“NOAA Official”**.
Requestor: Use your **XX number** in the Last Name field.
Click the **“Add New ACCS Line”** link.
Enter the ACCS Line information:
Project: Enter **28LEF29**. Task: Enter **P00**.
Organization: Enter **30-31-0002**
Object Class: Enter **41-11-00-00**
Amount: Enter **\$1,000**.
Click the **“Save”** button.
Click the **“DWValidate”** button.
Unique Account Descriptor: Click the **“Select Descriptor”** link.
Choose a descriptor by clicking the **“Select”** link.
Click the **“Cancel/Done”** button.
Click the **“CBSValidate”** button. Then click the **“Save and Return to Main”** button.

FPO – Partial Funding Step 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: [Apply Filter >>](#)

5 items found, displaying all items.

View	Task Received Date	Project Title	Document Id	Task Name	Award Number	Task Id	Task Status	Document Type
View	02/03/2020	GSTUDENT00 - Instructor App for Comp Process Dec 2019 Class2000	2845614	Procurement Request and Commitment of Funds	NA20GOT9980007	6781194	Not Started	Procurement Request and Commitment of Funds
View	02/03/2020	GSTUDENT00 - Instructor App for Comp Process Dec 2019 Class2000	2845613	Review Release of Funds	NA20GOT9980007	6781193	Not Started	Award File
View	02/03/2020	GSTUDENT00 - Instructor App for Comp Process Dec 2019 Class2000	2845612	Procurement Request and Commitment of Funds	NA20GOT9980007	6781192	Not Started	Procurement Request and Commitment of Funds

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 - NA20GOT9980007

Id: 2845614
Status: ProgramOfficerActions - In Progress

Action: [Submit](#)

Your Comments:
 Complete Procurement Request and Commitment of Funds
 Forward Procurement Request to Requestor

[Spell Check](#)

[Save Comment](#)

Approve the Procurement Request

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 >>](#)

5 items found, displaying all items.1

View	Task	Project Title	Document Id	Task Name	Award Number	Task Id	Task Status	Document Type
View	02/03/2020	GSTUDENT00 - Instructor App for Comp Process Dec 2019 Class2000	2845614	Review Procurement Request and Commitment of Funds	NA20GOT9980007	6781195	Not Started	Procurement Request and Commitment of Funds
View	02/03/2020	GSTUDENT00 - Instructor App for Comp Process Dec 2019 Class2000	2845613	Review Release of Funds	NA20GOT9980007	6781193	Not Started	Award File
View	12/07/2010	GSTUDENT02 - Whatever I Want for My Title	2845202	Procurement Request and	NA20GOT0090016	6770961	Not	Procurement Request and

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 - NA20GOT9980007

Id: 2845613
Status: ProgramOfficerActions - In Progress

Action: [Submit](#)

Your Comments:

- Please select an action
- Edit Specific 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

▶ **Workflow History**

📁 **Attachments:**

Pending Actions 

Nothing found to display.

NOTE: When the red **X** beside the Pending Actions is replaced with a green **✓**, 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 - NA20GOT9980007

Id: 2845613
Status: ProgramOfficerActions - In Progress

Action:

Your Comments:

- Edit Specific 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

▶ **Workflow History**

This completes the hands on activity for this Module.
Please complete the assessment questions for this Module.
 Then proceed with the next module.



Grants Online Training

Award Tracking Report, Correspondence & Federal Report, and Supplementary Information

Module #13

February 2021

[Corresponding Video](#)

There are no hands on activities for this module.

Please complete the assessment questions for this Module.