

Economic Development Administration

Grants Online Training Manual

New Project Officer Training 2020

Updated: May 2020

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Version History

This section outlines changes that have been made since previous versions of this manual were released.

Release Date	Changes Made
October 2015	First edition of this Manual
December 2015	Typos and formatting errors fixed. Training agenda updated. Chapters on Task and File Reassignment Created. Chapter on “Forward/Revise Award File” Created
October 2019	
May 2020	Bowser, YD. Respond to questions/concerns posed by Bernadette Grafton. Updated some process maps; others to be updated Decision needs to be made about font consistency – some places it is 11pt; others it is 12pt. Schedule for activities in the Training Agenda needs to be updated – BG. Decision needs to be made re: Acronym list – strict alphabetization or other logic for the order of the items. Also NOAA Program Offices are omitted, need to decide if that information should be included.
May 2020	A. Holt Updated process maps Updated screen shots Updated the User Roles tables Added Principal Place of Performance link Removed references to NOAA where appropriate

Training Agenda

Day 1 – Processing a Non-Competitive Application (EDD Example)

8:30 am	Overview and Logging in	(30 min)
9:00 am	Basic System Navigation: Workflow and Account Management	(60 min)
10:00 am	Viewing RFAs and Awards	(30 min)
10:30 am	Questions	(15 min)
10:45 am	<i>Morning Break</i>	(15 min)
11:00 am	Overview of RFA's and FFOs – Competitive, Non-Competitive, Institutional	(30 min)
11:30 am	SF-424 and Organization Profile	(60 min)
12:30 am	<i>Lunch Break</i>	(60 min)
1:30 pm	Procurement Requests	(30 min)
2:00 pm	NEPA Checklist	(30 min)
2:30 pm	<i>Afternoon Break</i>	(15 min)
2:45 pm	PO Checklist	(60 min)
3:45 pm	Questions	(30 min)

Day 2 - Processing a Competitive Application (University Center Example)

8:30 am	GMD Checklist	(60 min)
9:30 am	Specific Award Conditions	(30 min)
10:00 am	CD-450	(30 min)
10:30 am	<i>Morning Break</i>	(15 min)
10:45 am	Merit Review Module - Managing a Review Event	(60 min)
11:45 am	<i>Lunch Break</i>	(60 min)
12:45 pm	Merit Review Module - Reviewing an Application	(30 min)
1:15 pm	Selection Package*	(60 min)
2:15 pm	View Report: Application Report*	(15 min)
2:30 pm	Review of Application Processing Maps*	(15 min)
2:45 pm	<i>Afternoon Break</i>	(15 min)
3:00 pm	Recipient Award Acceptance	(30 min)
3:30 pm	View Report: Award Tracking Report	(15 min)
3:45 pm	Questions	(30 min)

Day 3 – Post Award Processing

8:30 am	Award Action Request: Satisfied Specific Award Conditions	(45 min)
9:15 am	Award Action Request: No-Cost Extension	(60 min)
10:15 am	ASAP Drawdown Request	(30 min)
10:45 am	<i>Morning Break</i>	(15 min)
11:00 am	Partial Funding	(60 min)
12:00 am	<i>Lunch Break</i>	(60 min)
1:00 pm	Financial and Progress Reports	(60 min)
2:00 pm	Questions	(30 min)
2:30 pm	Discussion of Reporting Needs	(15 min)
2:45 pm	<i>Afternoon Break</i>	(15 min)
3:00 pm	Meet with RO Leadership on Assignment of Roles and Any Other Issues/Concerns*	(60 min)

Grants Online Overview

Grants Online Acronym List

AAR	Award Action Request
ACCS	Accounting Classification Code Structure
AGO	Acquisition & Grants Management Office, NOAA
AO	Authorizing Official on Procurement Requests (see also BO)
AR or AOR	(Recipient) Authorized Representative
ARRA	American Recovery and Reinvestment Act
ASAP	Automated Standard Application for Payment (Department of the Treasury)
BAA	Broad Agency Announcement
BO	Budget Official (In Grants Online this is the Procurement Request Authorizing Official)
CAMS	Commerce Administrative Management System (now known as CBS)
CBS	Commerce Business Systems (formerly CAMS)
CCR	Central Contract Registry (now known as System for Award Management (SAM))
CD	Congressional District
CD-XXX	Commerce Department Form Number (e.g., CD-435, CD-450, CD-451)
CESU	Cooperative Ecosystem Studies Units
CFDA	Catalog of Federal Domestic Assistance
CFR	Code of Federal Regulations
CI	Cooperative Institute
Co-PI	(Recipient) Principal Investigator - Secondary
DNP	Do Not Pay
DOC	Department of Commerce
DOC-OS	Office of the Secretary, DOC
DUNS	Dun & Bradstreet Number
EDA	Economic Development Administration
EIN	Employer Identification Number
ERA	Electronic Recipient Acceptance
FAADS	Federal Assistance Award Data System
FAC	Federal Audit Clearinghouse
FAIS	Federal Assistance Information Sheet
FALD	Federal Assistance Law Division of DOC
FAPIIS	Federal Awardee Performance and Integrity Information System
FCS	U.S. and Foreign Commercial Service, ITA
FFO	Federal Funding Opportunity (Now known as NOFO)
FFR	Federal Financial Report
FIPS	Federal Information Processing Standards
FON	Funding Opportunity Number
FPO	Federal Program Officer
FRN	Federal Register Notice
GMAC	Grants Management Advisory Committee (NOAA)
GMD	Grants Management Division (NOAA and NIST); other agencies use the term Grants Management
GO	Grants Officer
GS	Grants Specialist
HDQ	Headquarters (EDA Line Office)
IA	Import Administration, ITA
ITA	International Trade Administration
LO	Line Office
MARS	Management Analysis and Reporting System

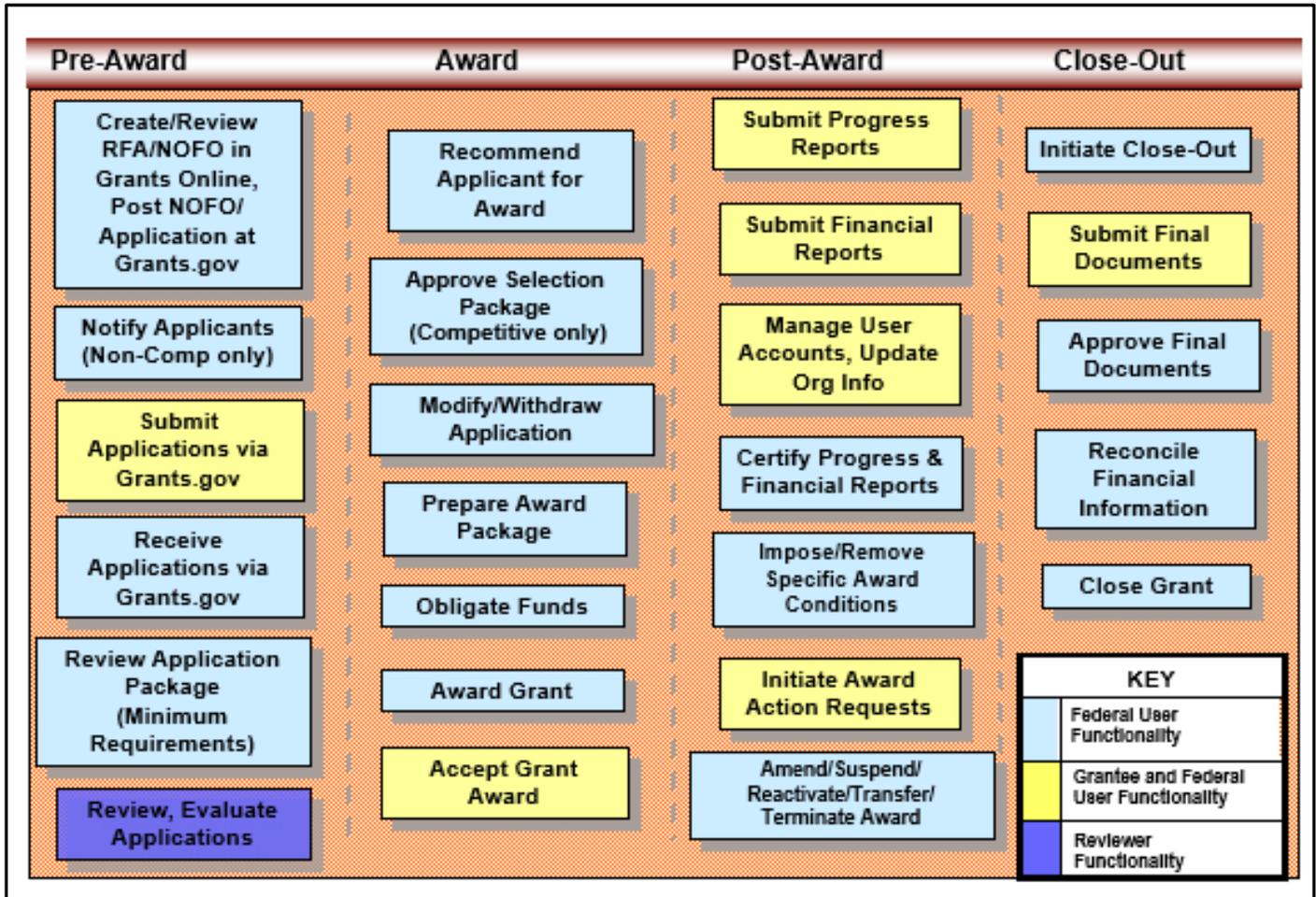
Grants Online Acronym List

MBDA	Minority Business Development Agency
NCE	No Cost Extension
NEPA	National Environmental Policy Act
NESDIS	National Environmental Satellite, Data, and Information Service (NOAA Satellite Service)
NFA or OFA	NOAA Finance and Administration
NMFS	National Marine Fisheries Service (NOAA Fisheries Service)
NOAA	National Oceanic and Atmospheric Administration
NOFA	Notice of Funds Availability (See FFO, FRN, NOFO, RFA)
NOFO	Notice of Funding Opportunity (Previously FFO)
NOS	National Ocean Service (NOAA's Ocean Service)
NTIA	National Telecommunications and Information Administration
NWS	National Weather Service, NOAA
OAR	Ocean and Atmospheric Research (NOAA Research)
OGC	Office of General Counsel, DOC
OHRM	Office of Human Resource Management, DOC-OS
OIE	Office of Innovation and Entrepreneurship (EDA Program Office)
OIG	Office of Inspector General, DOC
OLA	Office of Legislative Affairs (Bureaus)
OLIA	Office of Legislative and Intergovernmental Affairs, (Bureaus and DOC)
OMB	Office of Management and Budget (part of the Executive Office of the President)
OS	Office of the Secretary, DOC
OTIA	Office of Telecommunications and Information Applications, NTIA
PD	(Recipient) Project Director
PI	(Recipient) Principal Investigator
PO	Program Office (sub-organization under a Line Office)
PPR	Performance Progress Report
PRCF	Procurement Request and Commitment of Funds (CD-435) / Funding Memo
RFA	Request for Application
RNTA	Research and National Technical Assistance (EDA Program Office)
SAC	Specific / Special Award Conditions
SAM	System for Award Management
SEC/USEC	Office of the Under Secretary for Oceans and Atmosphere (USEC abbreviated to SEC for use in FON)
SF-XXX	Standard Form issued by the Office Management and Budget (e.g., SF-424, SF-269, SF-270, etc.)
SO	Selecting Official
TAAF	Trade Adjustment Assistance for Firms (EDA Program Office)

For the Grants Online Glossary, please reference:

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

Grants Life Cycle



Grants Online System Requirements

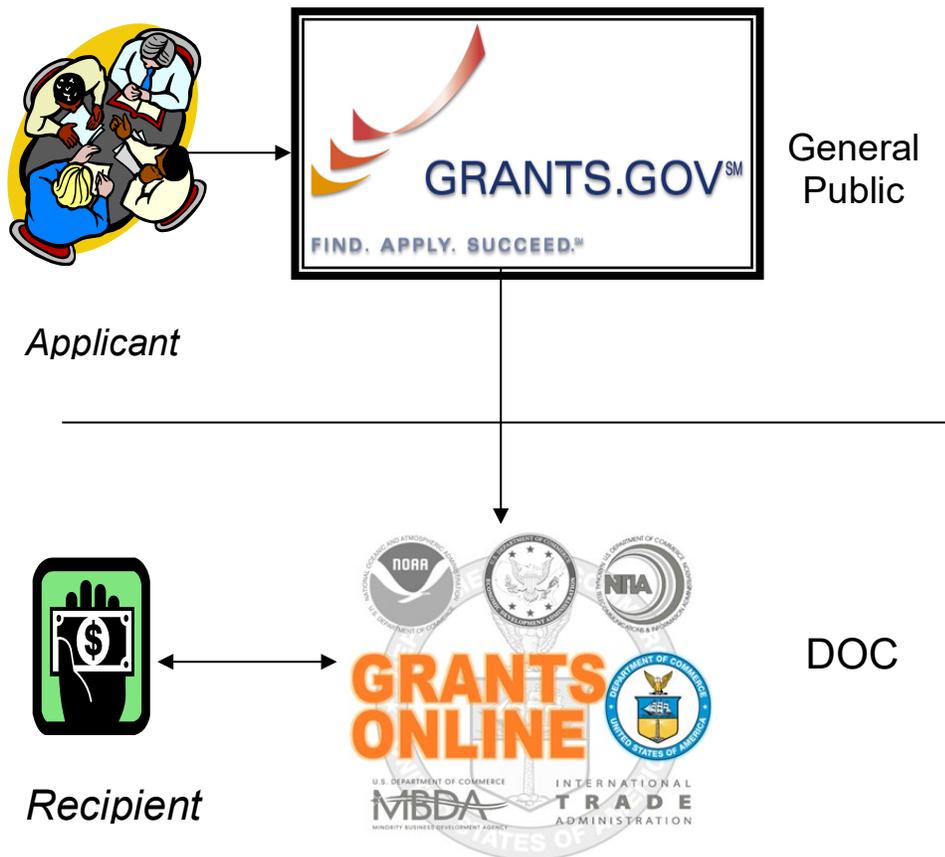
The System

Grants Online operates in a web environment and is accessible anywhere and anytime the user has Internet access. There is not a need for the user to install any special software on his/her computer. However, each user must register and obtain a unique login id and password from the appropriate official at his/her agency.

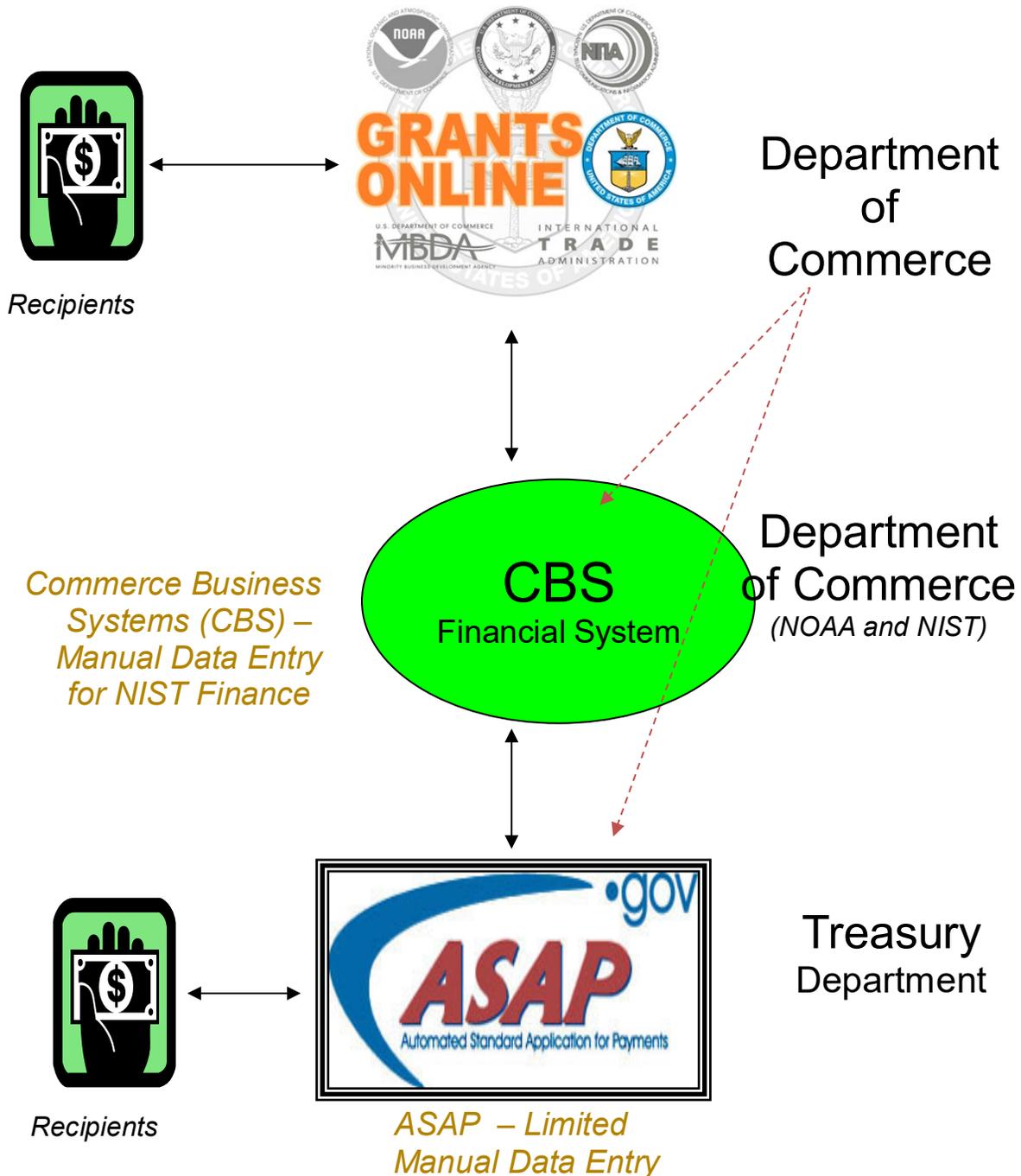
Recommended Internet Browsers:

- Google Chrome
- Firefox 2.0 or higher (PC or Mac)
- Windows – Internet Explorer 8 or higher
 - Attachments are supported in IE11 when settings are updated. Reference the following document to update IE11 settings: <http://www.corporateservices.noaa.gov/grantsonline/pdfs/IE%20Compatibility%20View%20Fix.pdf>

Grants Online and Grants.gov

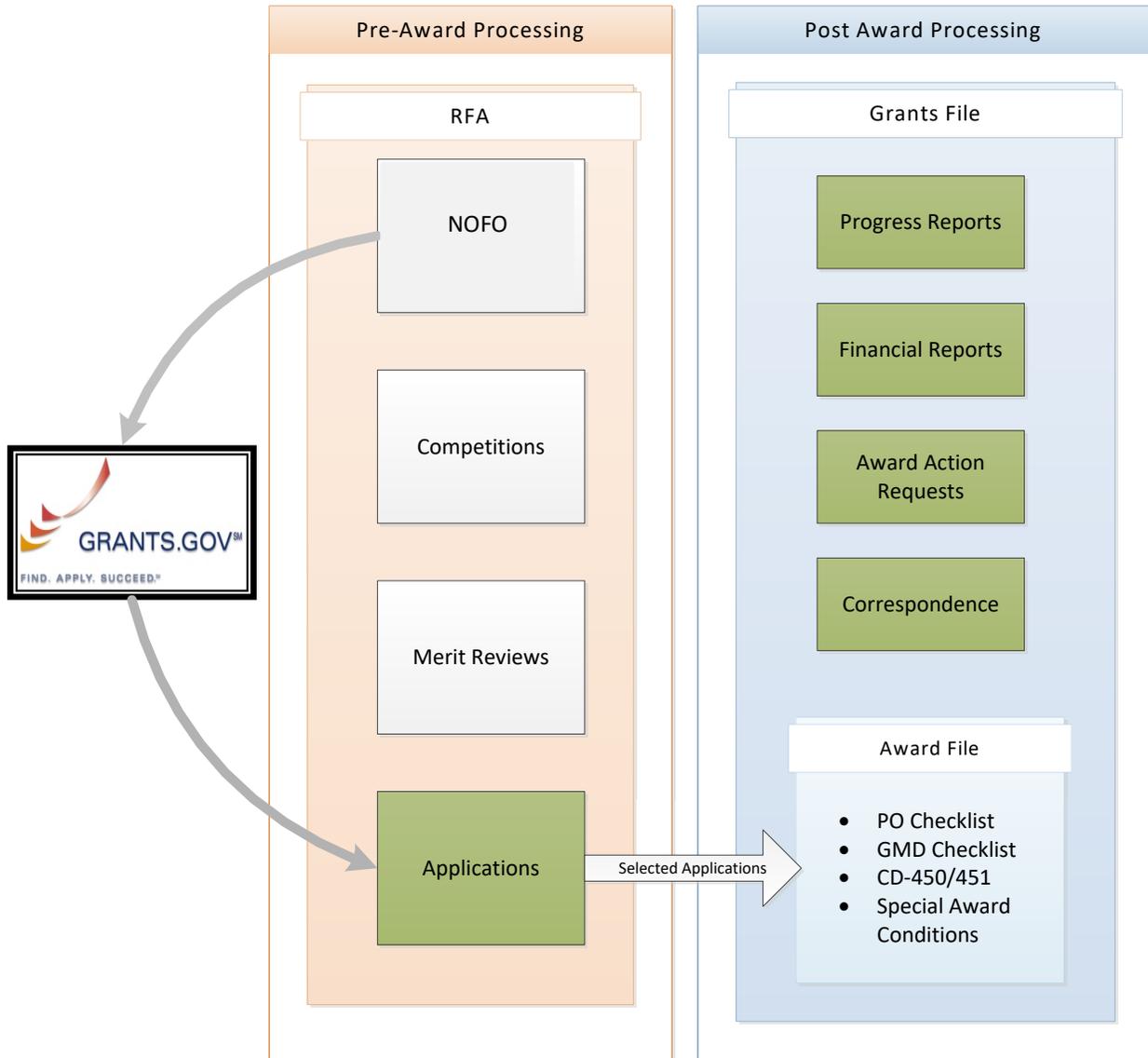


Grants Online and ASAP



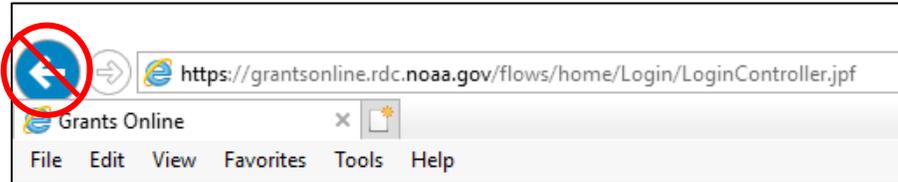
After the ASAP accounts have been set up, recipients can log onto ASAP.gov to electronically transfer (draw down) their grant funds to their own bank accounts. For recipients who have already been set up on ASAP, the funds are available when they accept their award in Grants Online. Recipients not yet set up on ASAP must complete the ASAP enrollment process in order to get set up with an ASAP account to draw down their grant funds.

Grants Online Document Relationships

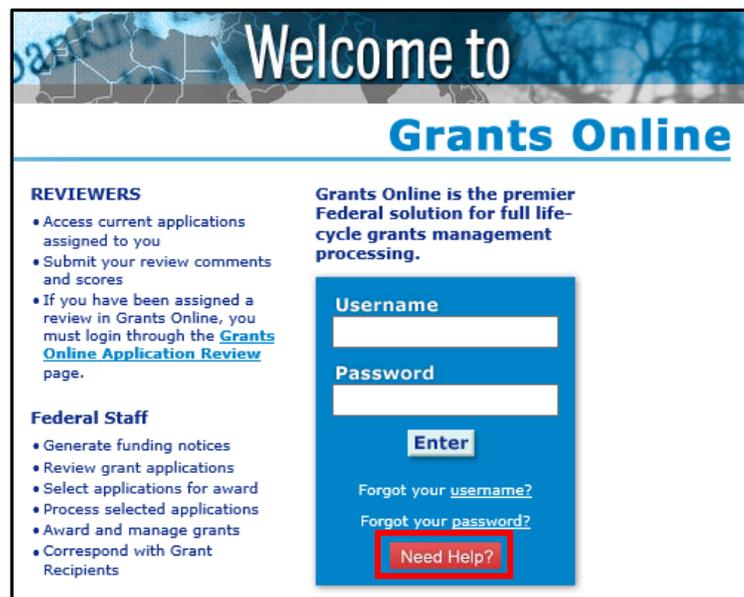


Grants Online Helpful Hints

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



- On the Home Page, click the "Need Help?" button. The Grants Online Help Desk contact information is visible.



Contact Grants Online Help Desk

Questions?

For assistance with completing tasks in Grant Online, please contact the Help Desk at the following phone number or email address:

Phone Number: (240) 533-9533

E-mail: grantsonline.helpdesk@noaa.gov

Hours of Operation: 8:00 am to 6:00 pm EST

- On the Home Page, click the “**Forgot your username?**” button. Instructions that include the Help Desk email address are visible.

Grants Online

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

Username
gstudent2

Password

Enter

[Forgot your username?](#)

[Forgot your password?](#)

Need Help?

grantsonlinetraining.rdc.noaa.gov says

To recover your username, please contact the Grants Online Help Desk by email at grantsonline.helpdesk@noaa.gov

OK

- After clicking the “**Save and Start Workflow**” button navigate to the Inbox tab and click the “**Tasks**” link. *To prevent unaddressed Tasks from remaining in the Inbox, always click the Tasks link prior to logging out.*

Save **Save and Start Workflow** Cancel Print

If you do not see the new task, click the “**Tasks**” link in the left navigation pane to refresh the page.

Economic Development Administration Banner

EDA
U.S. ECONOMIC DEVELOPMENT ADMINISTRATION

Inbox RFA Application Awards Account Management Reports Help

Welcome to Grants Online Bernadette Grafton. You are logged in to PROD1Pv. [Log Off](#)

Advisories >> **Tasks**

Your Tasks

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

9 items found, displaying all items.1

View	Task Received Date	Task Name	Task Status	Document Type	Document Id	Start Date	Completed Date
----------------------	------------------------------------	---------------------------	-----------------------------	-------------------------------	-----------------------------	----------------------------	--------------------------------

Buttons vs. Column Headings

➤ Buttons

Action:

Your Comments:

The ACCS is valid

Validated: true

Bureau (xx): *

Fund (xx): *

Fiscal Year (yyyy): *

Project Task: -

Program Code: - - -

Organization: - - - - - -

Object Class: - - -

Unique Account Descriptor:

Amount: *

Fund Type: X
Prior Year Fund:

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

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

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

➤ Column Headings

▼ **Workflow History**

Name	Date Assigned	Date Started	Date Completed
ASAP Authorization-Extension to Close Out	01/24/2020 12:19:54 PM	01/27/2020 08:19:35 AM	01/27/2020 08:22:22 AM
Review Award Action Request	01/23/2020 02:34:25 PM	01/24/2020 12:19:53 PM	01/24/2020 12:19:53 PM
Review Award Action Request	01/23/2020 02:33:20 PM	01/23/2020 02:34:24 PM	01/23/2020 02:34:24 PM

Dark blue column headings look like buttons except that there are one or more additional lines of information beneath them. The first line will be displayed with a medium blue background and the next line will have a pale blue background.

Your Tasks

Document Type: Status:

9 items found, displaying all items.1

View	Task Received Date	Task Name	Task Status	Document Type
View	01/27/2020	Review ASAP Award Action Request	Not Started	Award Action Request
View	01/27/2020	Review ASAP Award Action Request	Not Started	Award Action Request
View	01/24/2020	Review SF-425 Full Report	Not Started	SF-425: Federal Financial Report
View	01/22/2020	Review SF-425 Full Report	Not Started	SF-425: Federal Financial Report

Federal Grants Personnel

- **Program Office (Federal Program Officers)**
 - Provides the funding for the grant award
 - Federal Subject Matter Experts
 - Provides oversight for the programmatic aspects of the project – receives and accepts the Performance Progress Reports
- **Grants Office (Grants Management Specialists and Grants Officers)**
 - Provides the final approval for all Grants Management matters
 - Federal Grants Management Experts
 - Provides oversight for the financial aspects of the project – receives and accepts the Financial Reports (SF-425, SF-270)
- **Project Officer (EDA-Specific Function)**
 - Fulfills roles of both the Program Office and Grants Office, with the exception of the final Grants Officer review and approval.
 - Includes both the Federal Program Officer and Grants Specialist roles on the same user account.

Authorized Account Approver (AAA) Points of Contact for EDA

Bernadette Grafton	202-482-2917
Ryan Smith	202-482-1464

Grants Online Training and Help Desk

Grants Online PMO

- Go to the Grants Training Resources website:
<https://www.noaa.gov/organization/information-technology/grants-online-program-management-office>
- Have a Question when training is over?
 - Email the Help Desk: GrantsOnline.Helpdesk@noaa.gov
 - Call: 240-533-9533
 - Hours: 8:00 AM – 6:00 PM Eastern Standard Time
- Ready to start working in Grants Online?
 - Go to <https://grantsonline.rdc.noaa.gov>

Grants Online User Roles - Federal or Recipient (Grantee)

FUNCTIONS / ROLES	Cert FPO	UnCert FPO	Pgm Office Staff	Budget Officer (Authorized Official)	Pgm Office Reviewer	Pgm Office Requestor	NEPA Official	Selecting Official	GMAC	Grants Specialist	Grants Officer	Recipient Authorized Rep.	Recipient Admin.	Recipient PI/PD	Recipient Biz/Fin Rep.
View Awards	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Create RFA (Including NOFO and Synopsis)	X	X	X												
Review NOFO and Synopsis	X	X	X	X	X	X	X	X	X	X	X				
Review Reviewer Instructions	X	X	X												
Manage Competition	X	X	X												
Be Assigned Program Officer on RFA	X	X	X												
Be Assigned Program Officer on Application	X	X	X												
Notify Recipients for Non Competitive Apps	X														
Accept Competitive Applications								X							
Approve Selection Package								X							
Forward Documents to FALD	X							X							
Complete Negotiations	X	X	X												
Accept Minimum Requirements Checklist	X	X	X												
Reject Minimum Requirements Checklist	X														
Complete PO Checklist	X	X	X												
Certify and Forward PO Checklist	X														
Complete and Forward NEPA Document	X	X	X												
Approve NEPA Document							X								
Complete and Forward Procurement Request	X	X	X												
Be Requester on Procurement Request	X	X	X	X	X	X	X	X	X	X					
Review Procurement Request	X	X	X	X	X	X	X	X	X	X					
Authorize Funds on Procurement Request				X											
Initiate Partial Funding	X	X	X												
Initiate Award Action Request	X									X		X	X		
Initiate Amendment										X					
Complete Administrative Review of Award File										X					
Approve Award											X				
Accept or Reject Award												X			
Manage Recipient Users													X		
Complete Progress Report	X	X	X									X	X	X	
Submit Progress Report	X	X	X									X		X*	
Complete Financial Report												X	X		X
Submit Financial Report												X			X*
Accept Progress Report	X														
Accept Financial Report											X				
Authorize Bureau User Access to Grants Online									X		X				

Grants Online User Roles - Definitions

User Role	Definition
Authorized Account Approver (AAA)	This role is assigned to users (Federal - internal and Recipient Administrators - external) who have been authorized to update the Grants Online user accounts. Effective FY 2019, this role was added to the account of all users who operate in this capacity.
ASAP Authorizer	This role is given to the users who are responsible for the first step (ASAP Authorization) of the 2-step process used in setting up a new award in the ASAP System or adding funds to a current ASAP award. The second step is ASAP Certification performed by a user with a role of "Finance Office". The ASAP Authorizer is also responsible for releasing ASAP profiles as appropriate and reducing ASAP thresholds in the case of a reduction in funding.
Budget Officer (Request Authorizing Official)	The "Budget Officer" role in Grants Online is given to users who are actually Procurement Request Authorizing Officials. The person with this role checks availability of funds for the award and provides final approval for the Procurement Request (CD-435) of those funds as well as validation of the ACCS codes if not already done. This role has an accompanying threshold amount which the system uses to verify authorization to approve the use of Program Office funds.
CAMS First Approver CAMS Second Approver CAMS First and Second Approver	These roles are given to users responsible for entering grant obligations into the instance of the Department of Commerce's CBS that tracks financial actions for that particular Bureau. The business process is slightly different at different bureaus so the various roles reflect these differences.
CAMS First Approver - D CAMS Second Approver - D CAMS First and Second Approver - D	These roles are given to users responsible for entering grant de-obligations into the instance of the Department of Commerce's CBS that tracks financial actions for that particular Bureau. The business process is slightly different at different bureaus so the various roles reflect these differences.
CESU Manager (NOAA Only)	This role provides oversight for CESU (Cooperative Ecosystem Studies Units) Awards.
Closeout Notification Receiver	This role is given to Grants Management personnel who receive notification that the Final Progress Report and Final Financial Reports for the awards managed by each bureau have been accepted. The notification indicates that the award is ready for closeout activities to proceed.
Commit1 Commit2	These roles are given to users responsible for entering grant commitments (reservation of funds) into the instance of the Department of Commerce's CBS that tracks financial actions for that particular Bureau. The business process is slightly different at different bureaus so the various roles reflect these differences.
Director (EDA Only)	This role is unique to EDA and is given to the user who has Director-level approval authority on award actions and payments.
FALD	This role is given to users in the Department's Financial Assistance Law Division who are assigned to a particular Bureau. For some Bureaus there are Bureau-level instead of Department-level attorneys given this role.
Federal Program Officer - Certified	This role is given to a user who is responsible for the development of funding announcements, application reviews, and the processing of award and post-award recommendations to be sent to Grants Management. Within Grants Online, only FPOs who are Certified can communicate between their own Program Offices and outside entities such as FALD, Grants Management, and Recipients. For instance, an Uncertified FPO cannot "Certify" a PO Checklist or forward an Award File to Grants Management. Persons given this role are assumed to have obtained a certain level of training in the Grants Management arena.

User Role	Definition
Federal Program Officer - Uncertified	This role is intended for persons who are on track to become Certified Federal Program Officers but have not yet obtained the necessary credentials required by their Line Office. They may assist with all tasks normally done by a Certified Federal Program Officer, but cannot forward any documents to entities outside of their own Program Office. The documents must be reassigned to a Certified Federal Program Officer for that purpose.
Finance Office	This role is given to the users who are responsible for the second step (ASAP Certification) of the 2-step process used in setting up a new award in the ASAP System or adding funds to a current ASAP award. The first step is ASAP Authorization.
Finance Reviewer	This role is given to users who perform the preliminary Finance Office review of Financial Closeout documents. Workflow routing of tasks to this user is controlled by the "Reconciliation" checkbox on the deobligation memo.
GMAC (Grants Management Advisory Committee)	This role is reserved for the official members of the NOAA Grants Management Advisory Committee and their designated back-ups, along with the points of contact for the non-NOAA Bureaus. There are usually one or two GMAC users within each Line Office. The users with this role are responsible for authorizing the addition, update, or removal of Grants Online users within their respective Line Offices. They also provide input in prioritizing Grants Online system enhancement tickets.
Grants Officer	This role is reserved for Grants Management personnel who have been given authority to make award offers to recipients on behalf of DOC. They also make the final decisions with regard to approval or denial of Award Action Requests. This role is accompanied by a system enforced approval threshold for funding.
Grants Specialist	This role is given to Grants Management personnel who have responsibility for administrative processing of award files in preparation for DOC's offer to the recipient. They are also responsible for the review of Financial Reports and Award Action Request recommendations from the Program Offices.
Lead Budget Officer	The Lead Budget Officer has the responsibility of maintaining all of the Unique Account Descriptor codes in the Grants Online system for a particular Line Office.
NEPA Official	The NEPA Official reviews and approves the NEPA documentation, a part of the Award File, prior to submission to Grants Management.
NEPA Reviewer	The NEPA Reviewer provides an additional review of the NEPA documentation as part of an Award File prior to submission to Grants Management.
OIG -- Clearance	If a Grants Specialist selects forward to OIG, the person with this role in the Office of the Inspector General would receive a task to provide legal review.
OIG -- Oversight	The individual assigned to this role can view information associated with the legal aspects of an award. He/she does not have any tasks associated with legal review.
OLA	This role is given to a proxy Grants Online user account used to document the Bureau-level Legislative Affairs step in a funded award file workflow. When a task is routed to the OLA user, Grants Online sends a record to the Legislative Affairs system called WebDocFlow. A Grants Online notification is also sent to the email address associated with that proxy user account. Legislative Affairs users then log into the WebDocFlow system to complete appropriate actions related to congressional notification of awards. When their actions are completed in WebDocFlow a message is passed back to Grants Online to move the award to the next step of the workflow.

User Role	Definition
OLIA	This role is given to a proxy Grants Online user account used to document the Department-level Legislative Affairs step in a funded award file workflow. When a task is routed from the OLA user to the OLIA user within WebDocFlow, a message is transmitted to Grants Online which correspondingly moves the workflow in Grants Online to the OLIA step. A Grants Online notification is also sent to the email address associated with the OLIA proxy user account. When the OLIA actions are completed in WebDocFlow a message is passed back to Grants Online to move the award to the next step of the workflow.
Primary Office Contact	This role is assigned to those who can make updates to the Supplementary Information category for each Line Office or Program Office. If no one from either the Line Office or Program Office is assigned to this role, the Help Desk staff can update the Supplementary Information category.
Program Office Reviewer	This role is given to a person who needs to be included in the workflow to review a Request For Application (RFA), a Procurement Request, or a Performance Progress Report (PPR) but has no other role in Grants Online.
Program Office Staff	This role is given to users who provide assistance to Federal Program Officers but do not have signature authority. They are able to create RFAs and/or Federal Funding Opportunity notices, input paper applications and approve (but not reject) Minimum Requirement Checklists, run the review process, and complete (but not certify) the PO checklist. Users with this role have the same access in Grants Online as users with the role of Uncertified Federal Program Officer, but are usually contract staff.
Progress Report Reviewer	This is a Federal Program Office role given to a user whose only responsibility is to review Performance Progress Reports received from the grant recipients. This functionality can also be done by users with other Program Office roles such as Federal Program Officer (Certified or Uncertified), Program Office Staff, and Program Office Reviewer.
Public Affairs Liaison	This role is given to users who need to be notified about grant awards for the purposes of preparing press releases and/or other Public Affairs type activities which are separate and distinct from the Congressional notifications performed by the Legislative Affairs offices.
Recipient Administrator	A user with this role can set up other people in their organization as users of the Grants Online system and can grant the users access to specific awards as is appropriate.
Recipient Authorized Representative	This role is intended for recipient users with signature authority to sign official grant documents such as an SF-424 (application), or countersign an Award document such as a CD-450 (new Award) or CD-451 (amendment). More than one person can have this role at any organization; however on each Award one person will be designated the primary "Authorized Representative." (Designation as "primary" does not provide any additional access to awards in Grants Online.)
Recipient Business/Finance Representative	This role is given to recipient users who need to complete Financial Reports (SF-425 and SF-270). A user with this role cannot forward the Financial Reports to the Federal Agency. He/she can only forward the Financial Reports to his/her Authorized Representative; the Authorized Representative can submit Financial Reports to the Federal Agency.
Recipient Business/Finance Representative -- Submitting	This role is given to recipient users who need to complete Financial Reports (SF-425 and SF-270). A user with this role can submit Financial Reports directly to the Federal Agency.

User Role	Definition
Recipient Investigator (Principal Investigator/Project Director)	This role is given to recipient users who need to fill out Performance Progress Reports (PPRs) or Research Performance Progress Reports (R-PPRs). A user with this role can only forward the PPRs or R-PPRs to their Authorized Representative who can in turn submit the PPRs or the R-PPRs to the Department of Commerce. A user with this role can initiate an Award Action Request (AAR). However, all AARs must first be forwarded to an Authorized Representative for submission to the Department of Commerce.
Recipient Investigator -- Submitting	This role is given to recipient users who need to fill out Performance Progress Reports (PPRs) or Research Performance Progress Reports (R-PPRs). A user with this role can submit PPRs or R-PPRs directly to the Federal Agency. A user with this role can initiate an Award Action Request (AAR). However, all AARs must first be forwarded to an Authorized Representative for submission to the Department of Commerce.
Recipient User (Recipient Key Personnel)	A person with this role can view assigned awards for their organization and initiate Award Action Requests. However, a person with this role must submit documents to his/her organization's Authorized Representative. The Authorized Representative will review and submit documents to the agency.
Requestor (Program Office Requestor)	The role of Program Office Requestor is given to a user whose only function is to provide first-level "Requestor" approval on Procurement Requests (CD-435) prior to submission to the Budget Officer.
Reviewer	This role is given to a person who reviews applications during the Review Event Process. This person is typically a Subject Matter Expert or has some level of expertise in a discipline associated with the award.
RFA Publisher	This role is given to users who are responsible for posting grant opportunity notices at Grants.gov.
Selecting Official	The role of Selecting Official is given to a user who has the authority to approve the Selection Package generated from applications received in response to a Competitive funding announcement.
Vendor Control	This role is given to Finance Officer users who create and update vendors in CBS to be associated with Grants Online Organizations on an "interfaced" award. Obligations for "interfaced" awards are created and modified via transactions sent via web services between Grants Online and CBS. For "non-interfaced" awards the obligations are created and updated manually. Vendor Control users do not get workflow in Grants Online for "non-interfaced" awards.
Vendor Validator	This role is given to Tier3 Help Desk personnel in the Grants Online Program Management Office who perform data quality assurance tasks on Grants Online organization records before they are passed to the Vendor Control users in the Finance Office.
View Agency	This role is available for Federal staff (at the Agency/Bureau level) who need view-only access to grants files.
View Line Office	This role is available for Federal staff (at the Line Office Level) who need view-only access to grants files.
View Program Office	This role is available for Federal staff (at the Program Office Level) who need view-only access to grants files.

**Certified Program Officer or
Uncertified Program Officer**

Uncertified Federal Program Officers and Program Office Staff have identical Grants Online roles.

They can:

- Be assigned as the Program Officer on an RFA or application.
- Complete the PO Checklist.
- Complete the NEPA document and forward it to the NEPA Official.
- Complete Negotiations.
- Complete the Procurement Request and Commitment of Funds (PRCF) and send it to the Requestor.
- Initiate a Partial Funding.
- Accept the Minimum Requirements Checklist (**NOTE:** only the **Certified Federal Program Officer** can reject an Application).
- Create a Progress Report (but cannot accept Progress Reports).
- Be assigned as Requestors.
- Manage a Competition.

They cannot:

- Certify the PO Checklist (**NOTE:** only the **Certified Federal Program Officer** can certify the PO Checklist).
- Forward an Award File to the **Grants Specialist**.
- Create Award Action Requests (AARs). (Certified FPOs also cannot create Award Action Requests)
- Create Amendments. (Certified FPOs also cannot create Award Action Requests)
- Forward a RFA, the Reviewer Instructions, or the Federal Funding Opportunity (FFO); those tasks must be performed by the **Certified Federal Program Officer**.
- Forward Reviewer Instructions, AARs, the Award File or an Amendment to FALD for review.

NOTE:

An underlying rule is that the **Uncertified Program Officer** and **Program Office Staff** users cannot use the Grants Online system to communicate with Grants Management, FALD, Applicants or Recipients.

Grants Online System Navigation

Accessing Grants Online

1. Type <https://grantsonline.rdc.noaa.gov> in the address bar of your browser to launch the Grants Online home page.
2. Before logging into Grants Online, the user can access the public search feature, the Grants Online training page, and other useful links from this screen.

DEPARTMENT OF COMMERCE
UNITED STATES OF AMERICA

commerce
trade and
banking

Welcome to
Grants Online

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

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

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

Current Grant Recipients

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

REVIEWERS

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

Federal Staff

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

Training

- [Grants Online Training](#)

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

Username

Password

Enter

[Forgot your username?](#)

[Forgot your password?](#)

[Need Help?](#)



WARNING!

If the user enters his/her username or password incorrectly, s/he will see a red error message on the screen. After three unsuccessful attempts to log in, the system locks the user out of his/her account. The user must click the “**Forgot your password?**” link and provide the correct responses to his/her security questions. If the issue is “**Forgot your username?**” click that link to obtain the Help Desk phone number.

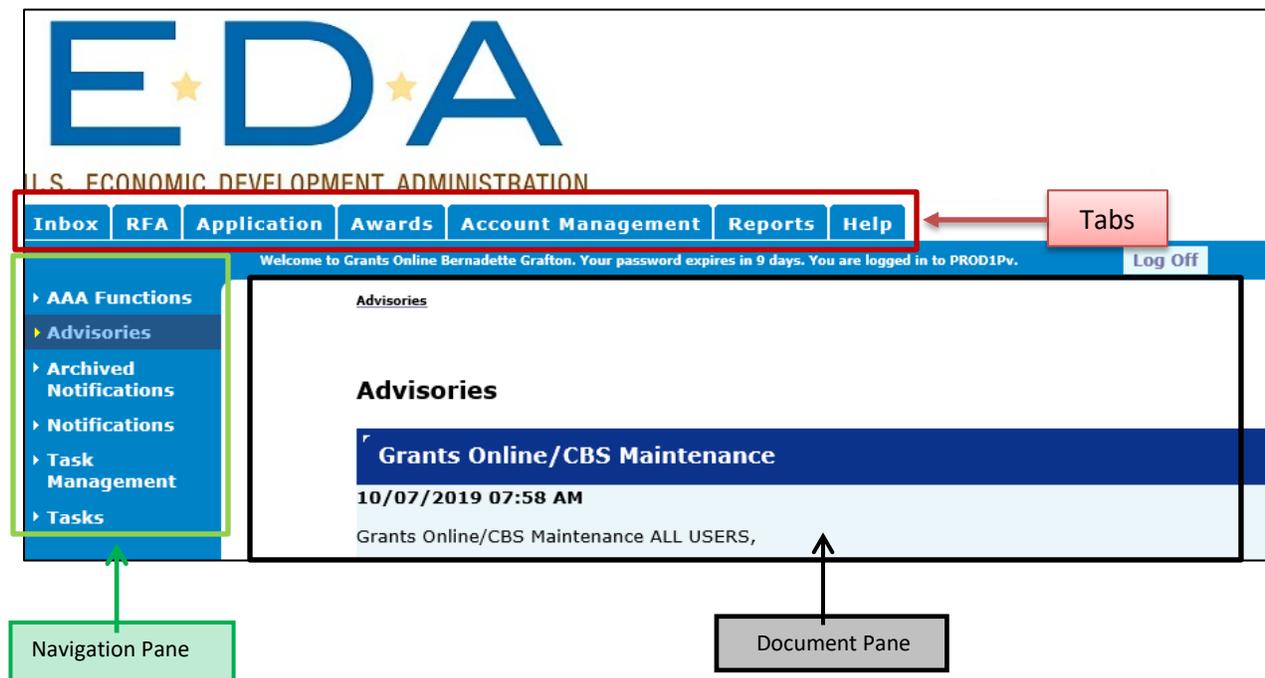
Grants Online Navigation Features

Access to most Grants Online features is determined by the user's role. Each registered user is given a role and level of access sufficient to accomplish his/her assigned tasks.

Screen Layout

When the user has successfully signed into Grants Online, the system will default to the Inbox Tab. Grants Online is divided into several content areas:

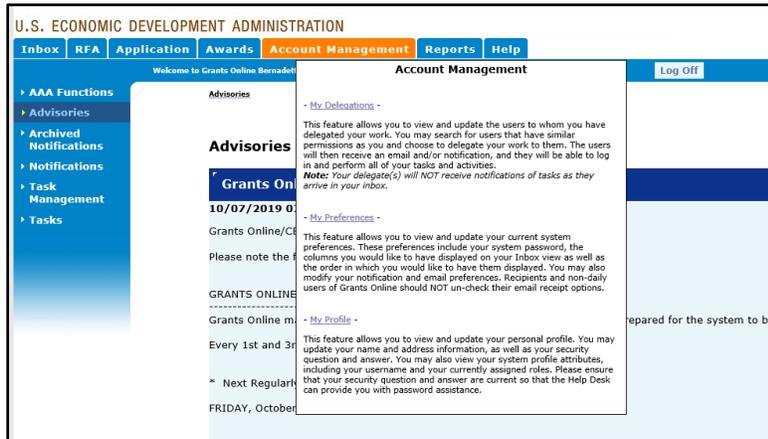
- **Tabs:** Highlighted by a red border at the top of the screen. Use the tabs to navigate to the different areas of Grants Online.
- **Navigation Pane:** Highlighted by a green border on the left-hand side of the screen. The options displayed in the navigation pane are determined by the active tab. Click on the desired link to go to that content area of Grants Online.
- **Document Pane:** Highlighted by a black border located in the middle of the screen. This is where most of the Grants Online details and information are displayed.



User Interface Features

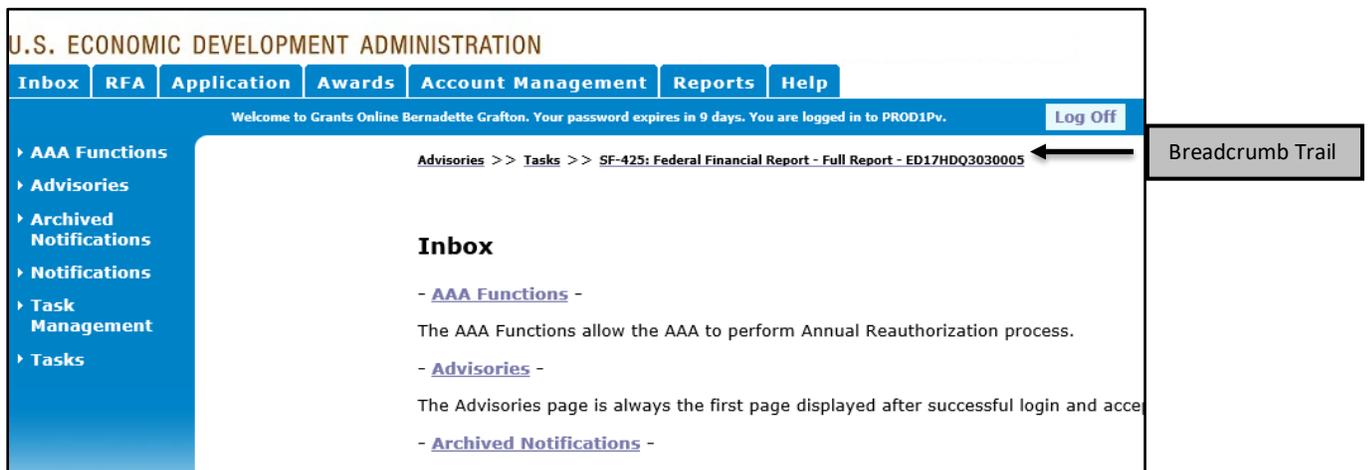
Pop-Up Short Cuts

When the user places the cursor over a tab at the top of the screen, s/he will see a pop-up menu that contains the same links as the left navigation pane for that tab. This allows the user to navigate directly to a content area without first having to click the tab.



Breadcrumbs

The Grants Online system keeps track of the pages the user has visited since s/he last signed on. The software puts a “breadcrumb trail” of those pages at the top of the document pane. This feature should be used instead of the browser’s “Back” button.



WARNING!

Please **DO NOT** use the browser’s “Back” button in Grants Online. Using the browser’s “Back” button may sign you out of Grants Online.

Help Tab

When logged in to Grants Online, click the **Help** Tab.



The screen shown below is displayed.

Contact Grants Online Help Desk

Questions?

For assistance with completing tasks in Grant Online, please contact the Help Desk at the following phone number or email address:

Phone Number: (240) 533-9533
E-mail: grantsonline.helpdesk@noaa.gov
Hours of Operation: 8:00 am to 6:00 pm EST

Please note: Grants Online Help Desk personnel do not have Grants.gov expertise. For Grants.gov questions, please call the Grants.gov Help Desk at 1-800-518-4726.

Inbox Tab

Tasks

Email notifications alert the user to an action or task that needs to be completed. When the user selects a task, he/she has the opportunity to complete the action that has been assigned to him/her within the workflow.

Access a Task

1. From the Inbox Tab, click the **Tasks** link. A list of the user's available tasks is displayed.

U.S. ECONOMIC DEVELOPMENT ADMINISTRATION

Inbox RFA Application Awards Account Management Reports Help

Welcome to Grants Online Bernadette Grafton. Your password expires in 9 days. You are logged in to PROD1Pv. [Log Off](#)

Advisories >> SF-425: Federal Financial Report - Full Report - ED17HDO3030005 >> **Tasks**

Your Tasks

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

3 items found, displaying all items.1

View	Task Received Date	Task Name	Task Status	Document Type	Document Id	Start Date
View	08/09/2019	Conduct Negotiations	In Progress	Application	2828412	09/06/2019
View	07/29/2019	Review SF-425 Full Report	In Progress	SF-425: Federal Financial Report	2823727	08/26/2019
View	06/05/2017	Procurement Request and Commitment of Funds	In Progress	Procurement Request and Commitment of Funds	2646454	06/05/2017

NOTE: To customize the look and feel of Grants Online, use the Account Management Tab. Details associated with the Account Management Tab are covered later in this document.

View a Task

1. Click the **View** link next to the task you wish to view.

Your Tasks

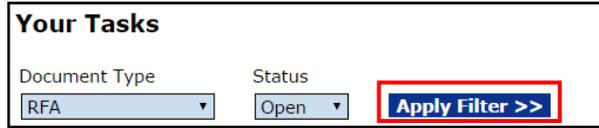
Document Type: Status: [Apply Filter >>](#)

17 items found, displaying all items.1

View	Award Number	RFA Name	Task Received Date	Applicant Name	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date
View	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571210	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2259324	
View	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571209	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitment of Funds	2259323	
View	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571077	Procurement Request and Commitment of Funds	In Progress	Procurement Request and Commitment of Funds	2259284	08/06/2014
View	NA14GOT9990070	Competitive RFA 041514	08/06/2014	SKILLIGALEE INC	2571076	Review Release of Funds	Not Started	Award File	2259283	

Filter a Task

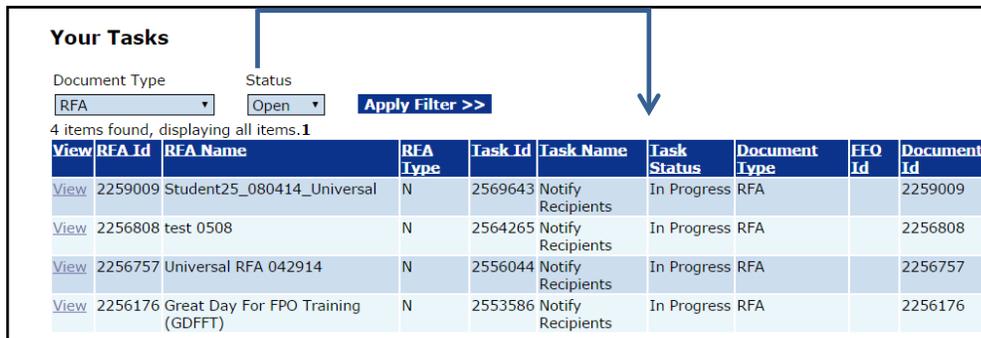
1. Select the Document Type from the dropdown list.
2. Specify the Status from the dropdown list.
3. Click the **Apply Filter** button.



Your Tasks

Document Type: RFA | Status: Open | **Apply Filter >>**

4. The **Your Tasks** screen shows only the filtered tasks. In this example, only the Open (In Progress) RFAs are visible.



Your Tasks

Document Type: RFA | Status: Open | **Apply Filter >>**

4 items found, displaying all items. 1

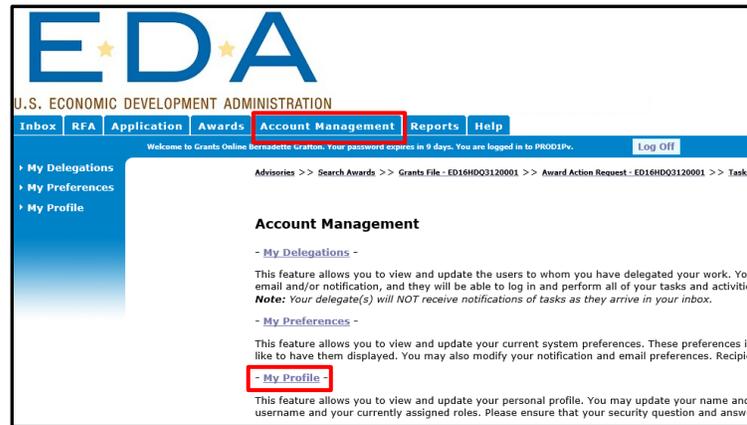
View	RFA Id	RFA Name	RFA Type	Task Id	Task Name	Task Status	Document Type	FEO Id	Document Id
View	2259009	Student25_080414_Universal	N	2569643	Notify Recipients	In Progress	RFA		2259009
View	2256808	test 0508	N	2564265	Notify Recipients	In Progress	RFA		2256808
View	2256757	Universal RFA 042914	N	2556044	Notify Recipients	In Progress	RFA		2256757
View	2256176	Great Day For FPO Training (GDFFT)	N	2553586	Notify Recipients	In Progress	RFA		2256176

Account Management Tab

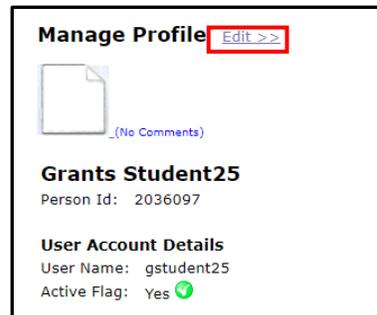
The Account Management Tab allows the user to view and update his/her profile; customize his/her notifications and task preferences; and delegate his/her Inbox to other users.

Manage the User Profile

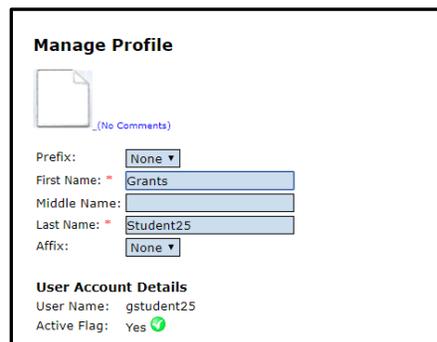
1. On the Account Management Tab, click the **My Profile** link.



2. The Manage Profile screen is visible. Click the **Edit** link.



3. The user is presented with a screen on which s/he can modify his/her identifying account information. The variables First Name* and Last Name* are mandatory data entry fields.



4. Scroll to the bottom of the screen and click the **Save** button. An indicator that data was saved is accompanied by the message “**Save was Successful**” and is displayed at the top left-hand corner of the screen. Although not required, it is strongly suggested that the user click the **Save** button after each modification.

Manage Profile

Save was successful.

Prefix: Ms.

First Name: Grants

Middle Name: A.

Last Name: Student25

Affix: None

User Account Details
 User Name: gstudent25
 Active Flag: true

Security Questions

#	Question Text	Answer Text
1	What is your mother's maiden name?	Jan
2	What is your father's middle name?	Feb
3	What is your mother's middle name?	Mar

Edit Security Questions

Affiliations

Details	Org ID	Organization	Position	Phone	Address
Details	2002468	GOT One Commerce Program Office (OCPO)		301-555-5555	200xx Century Blvd, Germantown, MD 20874-1143 USA

Add a new affiliation >>

Assigned Roles

Role	Org ID	Organization
Federal Program Officer - Certified	2002468	GOT One Commerce Program Office (OCPO)

Save Save and Return To Main Cancel

5. The Security Questions section displays the current questions and corresponding answers. Initially, when a user logs into Grants Online s/he must specify this information. To change or update the questions, click the **Edit Security Questions** button.

Security Questions

#	Question Text	Answer Text
1	What is your mother's maiden name?	Jan
2	What is your father's middle name?	Feb
3	What is your mother's middle name?	Mar

Edit Security Questions

6. From the next screen displayed, the user can modify his/her questions and answers. Click the **Save** button and updates are confirmed with the message “**Security questions saved successfully.**” Subsequently, the user must click the **Save and Continue** button. If the user opts to just click the **Save and Continue** button, changes are saved but the message does not display.

Security Questions

Security questions saved successfully.

- All questions must be answered
- No two questions can be the same
- No two answers can be the same
- Each answer must be at least 3 characters long
- Each answer may only contain alphanumeric characters, the "-", or the "/" characters

Security Question 1 : What is your mother's maiden name?

Security Question 2 : What is your father's middle name?

Security Question 3 : What is your mother's middle name?

NOTE : You will be able to reset your own password in the future if you can answer all 3 security questions with exactly the same answers that you provide here.

- To reset his/her password, the user must provide the correct responses to all security questions. If the user contacts the Help Desk for assistance with a password reset, s/he must provide an accurate response to all security questions. This assures the Help Desk that the user has the right to access the Grants Online account.
- To update his/her affiliations, click the **Details** link under the Affiliations header.

Affiliations						
Details	Org ID	Organization	Position	Phone	Address	E-Mail
Details	2002468	GOT One Commerce Program Office (OCPO)		301-555-5555	200xx Century Blvd, Germantown, MD 20874-1143 USA	testemail@msg2.rdc.noaa.gov

- When the screen shown below displays, click the **Edit** link.

Affiliation [Edit >>](#)

Organization GOT One Commerce Program Office (OCPO)

Primary Flag true

Active Flag true * Primary affiliation must be active.

Title

Street Address

City Germantown

State MD

Zip 20874-1143

Country USA

Mail Route

Phone Number 301-555-1212

Alternate Phone Number

Fax Number

E-Mail testemail@msg2.rdc.noaa.gov

Alternate E-Mail

10. As per convention, the data fields with a red asterisk require data. Make the necessary changes and click the **Save** button. If the user opts to click the **Cancel** button, changes are not saved.

Affiliation [View >>](#)

Organization GOT One Commerce Program Office (OCPO)
 Primary Flag true
 Active Flag true * Primary affiliation must be active.
 Title
 Street Address *
 City *
 State *
 Zip *
 Country *
 Mail Route
 Phone Number * Extension
 Alternate Phone Number Extension
 Fax Number
 E-Mail *
 Alternate E-Mail

Save **Cancel**

 **NOTE:** If a user wishes to change his/her Organization, s/he must contact his/her bureau's Grants Online representative. That person will contact the Help Desk on behalf of the user.

11. The final section on the Manage Profile screen cannot be modified without the involvement of a Bureau's Grants Online representative and the Grants Online Help Desk.

Assigned Roles

Role	Org ID	Organization
Federal Program Officer - Certified	2002468	GOT One Commerce Program Office (OCPO)

Done

12. Click the **Done** button to finalize the process and return to the main Account Management screen.

Security Questions

#	Question Text	Answer Text
1	What is your mother's maiden name?	Jan
2	What is your father's middle name?	Feb
3	What is your mother's middle name?	Mar

[Edit Security Questions](#)

Affiliations

Details	Org ID	Organization	Position	Phone	Address	E-Mail
Details	2002468	GOT One Commerce Program Office (OCPO)		301-555-1212	20020 Century Blvd, Germantown, MD 20874-1143 USA	testemail@msg2.rdc.noaa.gov

Assigned Roles

Role	Org ID	Organization
Federal Program Officer - Certified	2002468	GOT One Commerce Program Office (OCPO)

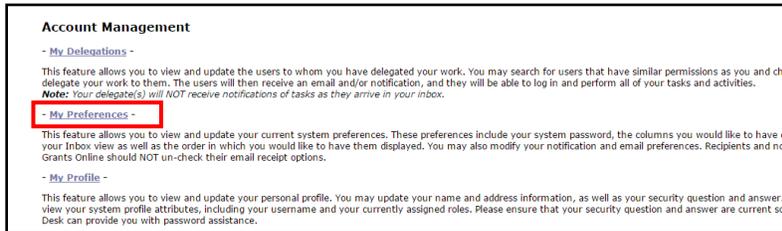
Done

User Preferences

The user may customize his/her viewing preferences using the My Preferences link. The user may add/remove email Inbox notifications. This will remove notifications sent to the user's external email account only. Headings may be customized to display certain fields on the user's tasks and notifications screens. Additionally, the user may change his/her Grants Online password.

Access User Preferences

1. From the Account Management Tab, click the **My Preferences** link.



2. On the screen shown below, the user can customize the page size, number of breadcrumbs, the look and feel, and the workflow warning.

The screenshot shows the 'User Preferences' page with the 'Site Preferences' section. It contains four settings: 'Page Size' (100), 'Number of Bread Crumbs' (20), 'Look and Feel' (DOC), and 'Workflow Warning' (Yes). Each setting has a text input field and a '+/-' button.

3. Scroll to the bottom of the screen and click the Save button to capture the changes.

The screenshot shows two sections: 'Award Tasks' and 'Post Award Tasks'. Each section has 'Available Columns' and 'Selected Columns' lists. The 'Award Tasks' section has a 'Save' button highlighted with a red box at the bottom left.

Customize Tasks

1. The user can modify his/her notifications using the checkboxes in the Email Inbox column (under the **Notification Preferences** section – top portion of the image below). Any modifications only impact the user's Email Inbox; the Grants Online Inbox specifications cannot be modified.
2. The user can modify the type and order of preferences that display on the screen. To make modifications, click the **Tasks Preferences** link (bottom portion of the image below). The user can modify his/her preferences for General Tasks, RFA Tasks, Award Tasks, and Post Award Tasks.

1

Notification Preferences

	Grants Online Inbox	Email Inbox
System Generated Advisories		
Password Expiration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Scheduled Downtime	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Policy Update	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Generated Workflow		
Task Assignment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Item Submission	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delegation of Work	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Generated Notices		
Expired Certification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pending Due Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Overdue Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

2

Task Preferences

General Tasks

Available Columns	Selected Columns
----- Please select an inbox column ----- Project Title Proposal Number Total Federal Funding Approved Federal Funding Award Start Date Competition Name	----- Please select an inbox column ----- Award Number RFA Name Task Received Date Applicant Name Task Id Task Name Task Status Document Type Document Id Start Date Completed Date
>>> <<<	Up Down

3. For the Task Preferences, use the Push [>>] and Pull [<<] functionality to specify the columns that will display on the Tasks portion of the screen.
4. For the Task Preferences, use the Up or Down buttons to select the column order that should display on the Tasks portion of the screen.
5. Click the Save button at the bottom of the screen. The user has to scroll to the bottom of the screen to see the Save button.

Post Award Tasks

Available Columns	Selected Columns
----- Please select an inbox column ----- Project Title Proposal Number Total Federal Funding Approved Federal Funding Applicant Name Task Received Date Award Start Date	----- Please select an inbox column ----- Task Id Task Name Award Number Task Status Document Id Document Type Start Date Completed Date
>>> <<<	Up Down

Change the Password

1. Click the **Change Password** button on the User Preferences screen.

User Preferences
Site Preferences

Page Size [+]

Number of Bread Crumbs [+]

Look and Feel [+]

Workflow Warning [+]

Change Password

2. When the change Password screen is visible, specify data for mandatory data fields – indicated by a red asterisk (*).
 - Enter the old password*.
 - Enter the new password*.
 - Enter the new password again to confirm*.
3. Click the Submit button.

Change Password

Old Password : *

New Password : *

Confirm New Password : *

Submit Cancel

NOTE: Once the password is successfully modified you will be redirected to login page

Password Guidelines :

- Passwords must contain at least twelve (12) non-blank characters.
- Passwords cannot contain quotation marks.
- Passwords are case sensitive.
- A Password must begin with an alphabetic character.
- At least one of the characters must be a number(0-9).
- At least one of the characters must be a special character. The only special characters allowed are underscore "_", dollar sign "\$", and pound sign "#".
- Six of the characters may only occur once in the password.
- At least 3 characters must be different than the previous password.
- Passwords must not contain the user's account name or parts of the user's full consecutive characters.



NOTE: Follow the Password Guidelines as detailed on the upper right-hand side of the screen.

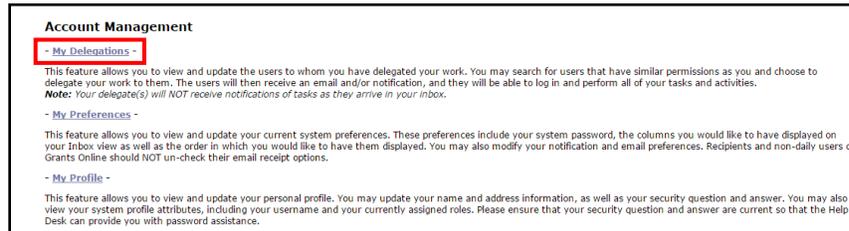
ONLY the following special characters are valid:
underscore "_", dollar sign "\$", and pound sign "#".

User Delegations

When the user selects the **My Delegations** link on the Account Management Tab, s/he will be able to view existing delegates, add delegates, and rescind delegates. A user can only select as a delegate a person with an access level that matches his/hers. For example, a certified program officer cannot delegate to someone who has a lower level of access (e.g., an uncertified Program Officer or a Program Office staff member). In addition to an equivalent level of access, the delegate must have the same organizational affiliation as the delegator.

Access User Delegations

1. From the Account Management Tab, click the **My Delegations** link.



2. The Delegate Authority screen is visible.

The 'Delegate Authority' screen displays the message 'You currently have no peers on your list of delegates'. It includes a 'Search for Peers' section with a note: 'Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.' Below this are input fields for 'First Name', 'Last Name', 'Organization', and 'Role'. The 'Role' dropdown menu is open, showing options: 'AGO', 'ASAP Authorizer', 'Award Mailer', and 'Budget Officer'.

Add a Delegate

1. Search for the user(s) who will be chosen as a delegate using the first name, last name, organization or role.
2. Click the **Find Peers** button.

This screenshot is identical to the previous one, but with the 'Find Peers' button at the bottom left highlighted with a red box. The 'Last Name' field now contains the text 'student'.

- When the search results are returned, choose the user you would like to assign as a delegate. Click the **Delegate** button.

Delegate Authority

You currently have no peers on your list of delegates

Search for Peers
Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.

First Name:

Last Name:

Organization:

Role:

Find Peers

Search Results

Grants Student00 ▲
 Grants Student01 ▲
 Grants Student02 ▲
 Grants Student03 ▼

Delegate

- The screen shot below is visible when a person is successfully chosen as a delegate. To specify additional delegates, repeat steps 2-3 as many times as is necessary.

Delegate Authority

Current Peers on delegation List:

Action	Prefix	Affix	Name	Phone	Email	Fax	Title	Organization
Rescind			Grants Student00	301-555-1212	testemail@msg2.rdc.noaa.gov			GOT One Commerce Program Office

Search for Peers
Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.

First Name:

Last Name:

Organization:

Role:

Find Peers

Rescind a Delegation

- From the Account Management Tab, click the **My Delegations** link.

Account Management

[- My Delegations -](#)

This feature allows you to view and update the users to whom you have delegated your work. You may search for users that have similar permissions as you and choose to delegate your work to them. The users will then receive an email and/or notification, and they will be able to log in and perform all of your tasks and activities.
Note: Your delegate(s) will NOT receive notifications of tasks as they arrive in your inbox.

[- My Preferences -](#)

This feature allows you to view and update your current system preferences. These preferences include your system password, the columns you would like to have displayed on your Inbox view as well as the order in which you would like to have them displayed. You may also modify your notification and email preferences. Recipients and non-daily users of Grants Online should NOT un-check their email receipt options.

[- My Profile -](#)

This feature allows you to view and update your personal profile. You may update your name and address information, as well as your security question and answer. You may also view your system profile attributes, including your username and your currently assigned roles. Please ensure that your security question and answer are current so that the Help Desk can provide you with password assistance.

- The Delegate Authority screen is visible. If the user has assigned one or more person(s) as a delegate, the Current Peers on Delegation List will display; otherwise, the user is only presented with the option to Search for Peers.
- Click the **Rescind** link next to the name of the individual(s) you would like to remove as a delegate.

Delegate Authority

Current Peers on delegation List:

Action	Prefix	Affix	Name	Phone	Email	Fax	Title	Organization
Rescind			Grants Student00	301-555-1212	testemail@msg2.rdc.noaa.gov			GOT One Commerce Program Office

Search for Peers
Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.

First Name:

Last Name:

Organization:

Role:

- ASAP Authorizer
- Award Mailer
- Budget Officer

[Find Peers](#)

Log In As a Delegate

- The user should log in to Grants Online with his/her normal user name.
- Click the OK button on the Notice to Users page.
- Choose to continue as yourself (click the Continue to Inbox link).

-or-

Access Grants Online as the person who assigned you authority to access his/her account (click the **Select** link next to the person's name).

Choose Active User

Other users have chosen to delegate their work to you.
You may choose to work as one of the users listed below.
Otherwise, choose 'Continue to Inbox' to work as yourself.

Select	User Name
Select	Grants Student00

[Continue to Inbox >>](#)



NOTE: When a user is signed into Grants Online as a delegate, the system will identify him/her as a delegate of that individual (see below). The tasks displayed on the screen are the tasks the delegate may perform on behalf of the original user. Both the user and the delegate can work in Grants Online simultaneously.

The screenshot shows the Grants Online interface. At the top, there is a navigation bar with tabs for 'Inbox', 'RFA', 'Application', 'Awards', 'Reports', and 'Help'. Below this, a status bar indicates 'OPERATING AS DELEGATE FOR Grants Student00. You are logged in to TRAIN2P.' and a 'Log Off' button. A callout box with an arrow points to the status bar, containing the text: 'The current user is operating as the Delegate for Grants Student00.'

The main content area is titled 'Your Tasks' and includes filters for 'Document Type' (set to 'All') and 'Status' (set to 'Open'). Below the filters, it states '124 items found, displaying 1 to 100.' and provides navigation links: '[First/Prev] 1, 2 [Next/Last]'. A table of tasks is displayed below:

View	Award Number	Proposal Number	Task Received Date	Start Date	Task Id	Task Name	Task Status	Document Type	Document Id	Applicant Name
View	N/A	N/A	09/06/2014		2572977	Notify Recipients	Not Started	RFA	2258903	N/A
View	N/A	N/A	08/06/2014	08/06/2014	2571285	Manage Review Event	In Progress	Review Event	2259327	N/A
View	N/A	N/A	08/06/2014	08/06/2014	2571283	Conduct Negotiations	In Progress	Application	2259329	bangor - lillian

Reassignment Features

How to reassign a task

The Task Management feature in Grants Online will allow you to reassign a particular task from one person to another.

For specifics on how to use the reassignment features, please reference the following Reassignments User Manual.

<https://www.noaa.gov/sites/default/files/atoms/files/Reassignments.pdf>

Viewing RFAs and Awards

RFA: Request for Applications

Overview

Encompasses:

1. Notice of Funding Opportunity (NOFO)
2. Competitions (if any)
3. Merit Review Events (if any)
4. Applications Received

RFA Types: Competitive

- Recipients are not known in advance
- A selection package is required
- Non-Competitive
 - Includes Institutional Awards (i.e. EDDs), and earmarks
 - Main requirement is that recipients are known in advance
 - No funding opportunity needed in Grants Online
 - Applicants can access application packages through grants.gov using the Funding Opportunity number, but the Funding Opportunity cannot be “found” by the Grants.gov search feature.

Setup of the RFA includes the designation of:

- Basic data and information necessary to post a NOFO on Grants.gov and set up applications in Grants Online (CFDA #, Fiscal Year, Total Available Funding, etc.)
- Staff who will initially receive and process applications
 - Can be done via WORKLOAD routing (i.e. round-robin) or STATE routing (applications from specific states go to designated reps)
 - Once applications are received, they can also be reassigned
- Minimum Requirements that applications must meet in order to be processed (Technical Review)
- Review Events that will be handled through the Merit Review Module in Grants Online

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 attachments.
[Large File Guidance](#)

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

Searching for an RFA

U.S. ECONOMIC DEVELOPMENT ADMINISTRATION

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

Welcome to Grants Online Kerstin Millius. Your password expires in 15 days. You are logged in to PRODIGY. Log Off

Advisories >> Tasks >> Search RFAs

Search for RFA

RFA Name :

Funding Opportunity Number : ED

CFDA Number :

Fiscal Year :
(use format YYYY)

Choose Type:

All Noncompetitive

Competitive Broad Agency Announcement

Congressionally Directed Congressionally Mandated

Institutional Formula/Allotment

Search Results

12 items found, displaying all items.1

RFA ID	Name	Type	FFO Number	Competition Name	Competition Id	Fiscal Year	Publication Date
2557452	FY 2015-2016 TAAF Federal Funding Opportunity	Competitive	EDA-HDQ-TAAF-2015-2004657			2015	
2544155	Integrating Economic Development Across the Federal Government	Competitive	EDA-HDQ-RNTA-2015-2004525	Integrating Economic Development Across the Federal Government	2544156	2015	
2553901	Innovation Policy Forum	Noncompetitive	EDA-HDQ-RNTA-2015-			2015	2015-08-20

Funding Opportunity Number Algorithm:

BBB- LLL-Program Office-YYYY-NNNNNNN (e.g. **EDA-HDQ-TAAF-2016-2004559**)

- **BBB** Bureau Identifier: **EDA**
- **LLL** Line Office Identifier, e.g. **Headquarters = HDQ**
- **Program Office** Acronym for the relevant Program Office for the FFO (Note: Funding Opportunities pertaining to all of EDA may be posted using HDQ as the Program Office)
- **YYYY** Fiscal Year
- **NNNNNNN** A sequence derived number

Searching for an Award

U.S. ECONOMIC DEVELOPMENT ADMINISTRATION

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

Welcome to Grants Online Kerstin Millius. Your password expires in 15 days. You are logged in to PRODLT. [Log Off](#)

Advisories >> Tasks >> Search RFAs >> Search Awards

SF-425A for Multiple Awards

Search Awards

Search Reports

Supplementary Information Management

Search Awards

Award Number:

Recipient 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

38 Items found, displaying all items.1

Award Number	Org ID	Recipient Name	Project Title	Award Status	Principal Investigators: Project Directors
ED15HDQ0300039	2002896	Pittsburg State University	Pittsburg Research Park	Accepted	None Designated
ED15HDQ0200013	2003712	Montana Economic Revitalization and Development Institute	Manufacturing Consortium of Montana Mansfield Prof...	Accepted	None Designated
ED15HDQ0200027	2003726	REGIONAL DEVELOPMENT CORP	Venture Acceleration Fund Enhancement Project NM	Accepted	Grace Brill
ED15HDQ0200005	2003692	Ohio Energy And Advanced Manufacturing Center, Inc	Development of a High Strain Rate Metal	Accepted	None Designated

Award Number Algorithm:

BBYYLLLCCNNNN (e.g. ED14HDQ3030001)

- **BB** Bureau Identifier: EDA = ED
- **YY** Last 2 digits of Fiscal Year
- **LLL** Line Office Identifier, e.g. Headquarters = HDQ
- **CCC** The post-decimal part of the CFDA Number, e.g. 11.303 (CCC --> 303)
- **NNNN** A sequence derived number that starts with 0001 for each line office for each Fiscal Year

EDA Line Office Identifiers:	
Atlanta	ATL
Austin	AUS
Chicago	CHI
Denver	DEN
Philadelphia	PHI
Seattle	SEA
Headquarters	HDQ

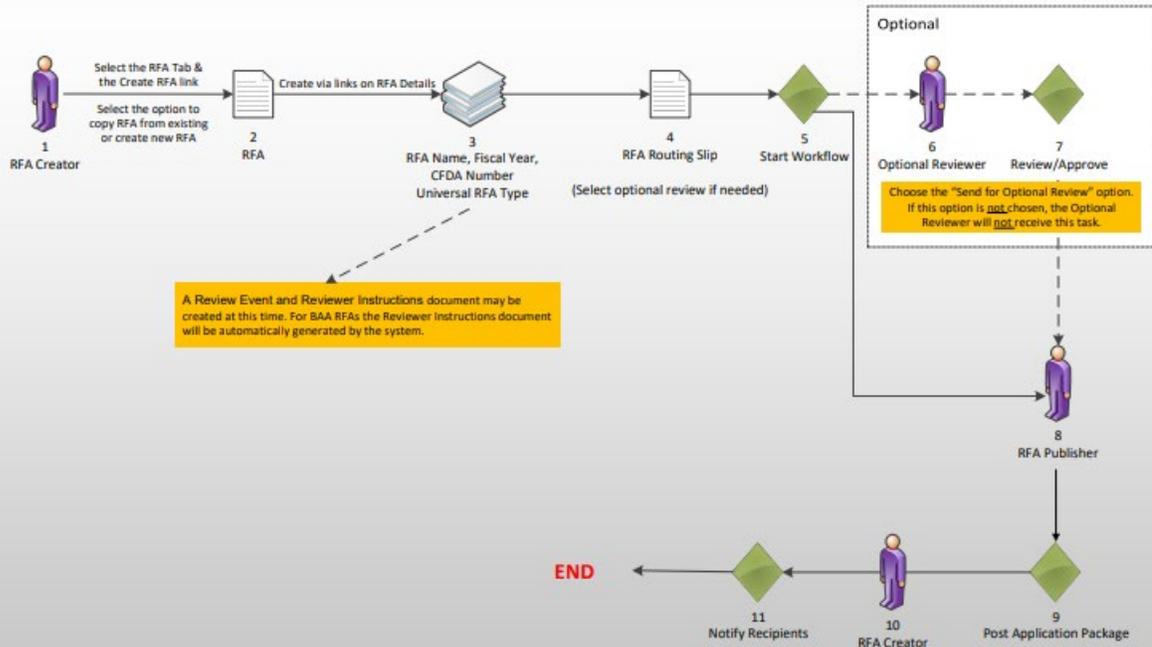
Processing a Non-Competitive Application

(EDD Example)

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

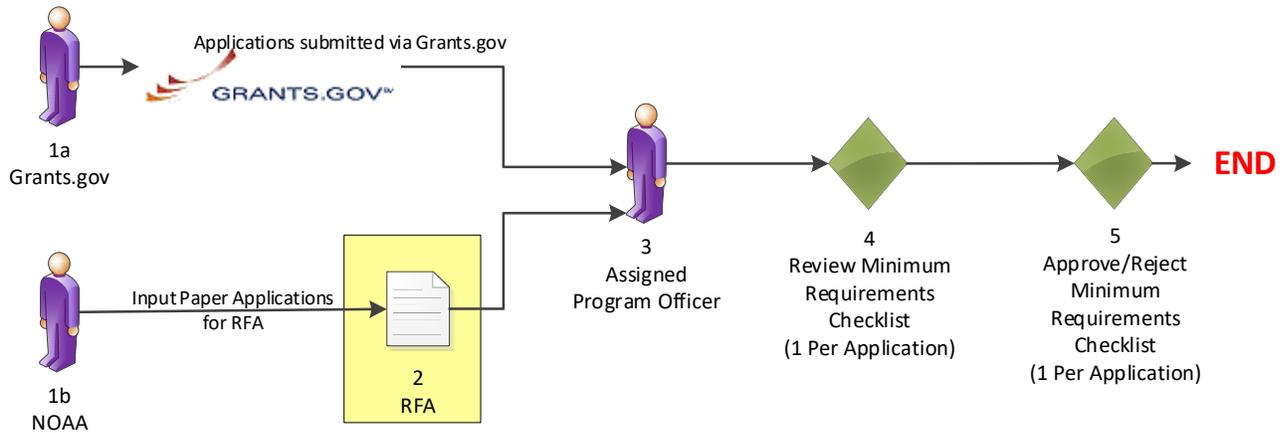
March 4, 2020

Version 4.27



We will use the sample application in the training package for data entry.

Receiving/Inputting a Paper Application



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

[Guidance](#)

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: Project End Date:

State Received Date: Federal Agency Received Date:

Applicant Identifier: State Application Identifier:

Note: While you will rarely have to input a paper application, this section will help you understand the data fields and other information needed to process an application in the system.

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

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. Only the fields marked with an asterisk are required for the application processing to continue.

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

Name of Federal Agency:

Applicant Congressional District: Project Congressional District:

Is the Applicant Delinquent on any Federal Debt? Yes No

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

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

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

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

Project Director/Principal Investigator Contact Information

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

Title:

Organization:

Department:

Division:

Phone Number:

Email:

Street:

City:

State:

Country:

Authorized Representative

Prefix: First Name: Middle Name: Last Name:

Title:

Phone Number:

Email:

Street:

City:

State:

Country:

Application Funding Details: *

Total Funding: *

Multi Year Award:

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**

Application Funding Details: *

Total Funding: *

Multi Year Award:

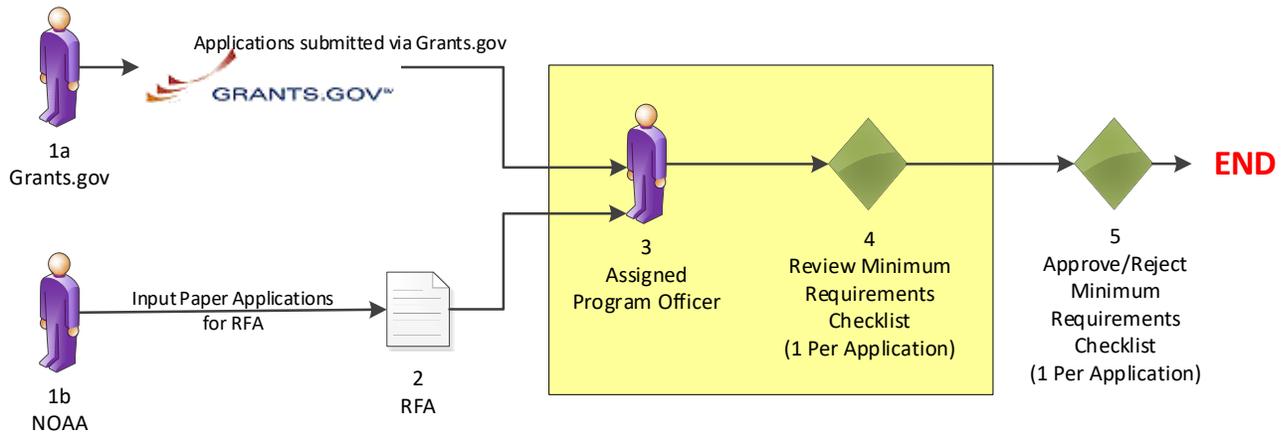
Fiscal Year	Start Date	End Date	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2020	10/01/2019	09/30/2023	\$500,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500,000.00	\$0.00	Edit	Delete

[Add New](#)

Save as Draft **Save and Start Workflow** **Cancel**

The “Total Funding” amount includes both Federal and matching funds.

Minimum Requirements Checklist



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	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="text-align: right;">Spell Check</p>
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	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="text-align: right;">Spell Check</p>
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	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="text-align: right;">Spell Check</p>
Complete Application: Does the application contain all of the required forms?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="text-align: right;">Spell Check</p>
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	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="text-align: right;">Spell Check</p>

Overall Comments:

[Spell Check](#)

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

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

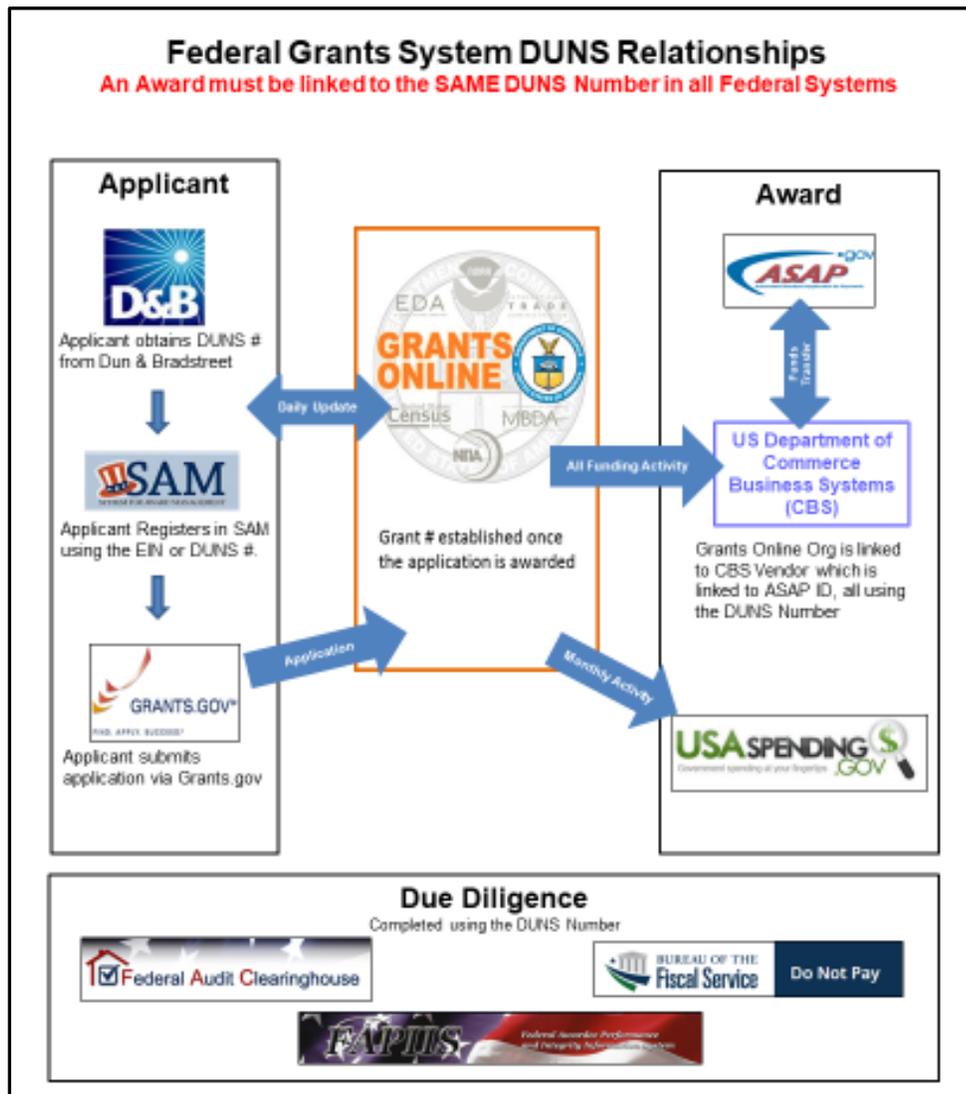
If the “No” radio button is selected on any of the items comprising the Minimum Requirements Checklist, a comment should be entered in the associated comments box or in the Overall Comments box (typically at the bottom of the screen). The user will not be allowed to save the screen without a comment if a “No” radio button has been selected.

Rejecting or Withdrawing an Application

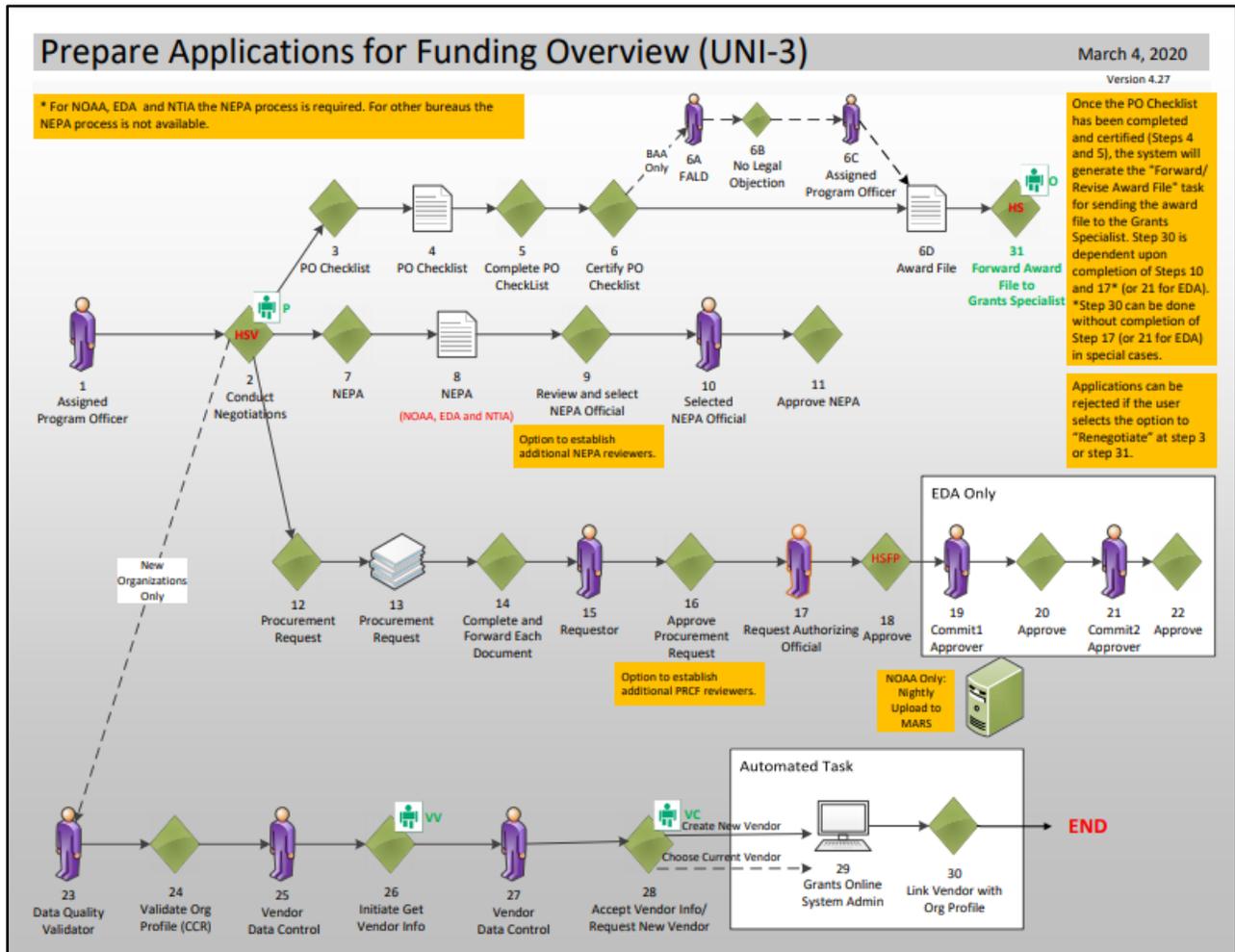
Withdraw – Use for duplicate applications

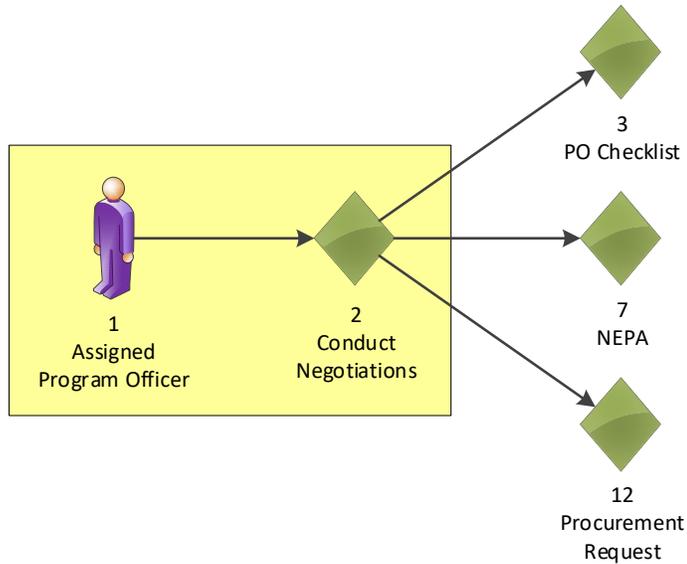
Reject – Use for applications that do not meet minimum requirements. Note: “Reject Application” does not automatically notify the applicant that their application has been rejected. This should be done outside the system, and a copy of the notice saved to the application file.

Federal Grants System DUNS Relationships



SF-424 and Organization Profile: "Conduct Negotiations"





Scenario 1: DUNS Number is found in Grants Online

Application Submission Type and Date Information
 Type of Submission: Application Pre-Application Changed/Corrected Application
 Type of Application: New Continuation Revision Renewal Resubmission
 If Revision, select appropriate letter(s):
 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:

Step 1:
 If the DUNS Number was entered on the application and the organization is found in Grants Online, a message in black bold text will be displayed that reads "This Applicant has been automatically assigned a Grants Online Organization based on unique DUNS Number match."
 Proceed to Step 2.

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

Application Submission Type and Date Information
 Type of Submission: Application Pre-Application Changed/Corrected Application
 Type of Application: New Continuation Revision Renewal Resubmission
 If Revision, select appropriate letter(s): [-Select a Revision Type-]
 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 Please Associate an Organization within Grants Online using the Org Lookup button. Org Lookup
 Department Name: _____
 Division Name: _____
 Duns Number: * (9 or 13 digit number) _____ EIN 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	002880	BANGOR PUBLISHING COMPANY	NOAA	491 MAIN ST. BANGOR, ME 04401-6296 USA	001096643	010024570			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

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: *
 Department Name:
 Division Name:
 Duns Number: * EIN Number: * (9 or 13 digit number) (xx-xxxxxxx)
 Street:
 City: County:
 State: * Province:
 Country: Zip:

Step 1:

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

b) The DUNS Number will automatically be pre-populated in the field. Click the **Search** button.

c) If the desired organization is NOT found in Grants Online, click the **Add a new organization** link.

d) If the organization's record is in the SAM.gov file, click the **Select** link.

OR

e) Click the **Add a blank organization** to manually enter a new organization or individual recipient. Proceed to Step 2.

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

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"/>	3-16795	GLOBAL ENVIRONMENT AND TECHNOLOGY FOUNDATION	2900 S QUINCY ST STE 375, ARLINGTON, VA 22206-2231 USA	878128073	541489434	1DGJ8	true

Associating an Application with an Organization Profile in Grants Online

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).
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 a New 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-xxxxxx) 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

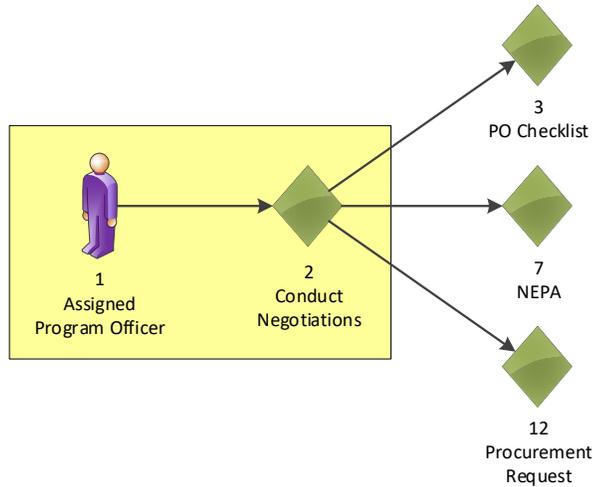
SAM Mailing Address

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).



View	Task Name	Award Number	Task Received Date	Document Type	Project Title	Task Status	Document Id	Task Id	Start Date	Completed Date	Applicant Name	Proposa Number
View	Conduct Negotiations	N/A	02/05/2011	Application	LB Universal2 RFA App	Not Started	2199761	1795527			icmr	LB Univ2 App
View	Notif. Recipients	N/A	02/05/2011	RFA	N/A	In	2199760	1795525	02/05/2011		N/A	N/A

[-] Program Office Added Information

Proposal Number:

Project Type: Construction Non-Construction Both

Principal Investigators-Project Directors:

Keyword(s):

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

[Guidance](#)

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

Step 2: Select Construction, Non-Construction or Both

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: Authorized Representative Lookup – Find Auth Rep in database

Award Number:

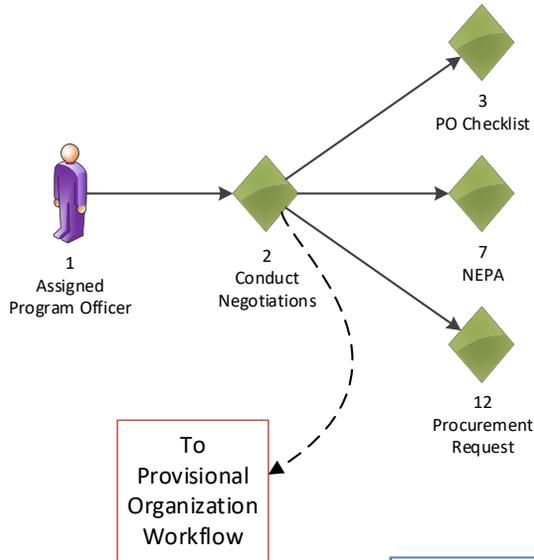
Generate New Award Number

Associate with Existing Award

Save Save and Return to Main Cancel

Step 5: Generate New Award Number or Associate with Existing Award

Conduct Negotiations Complete



No Procurement Request for Zero Dollar Awards

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	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

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

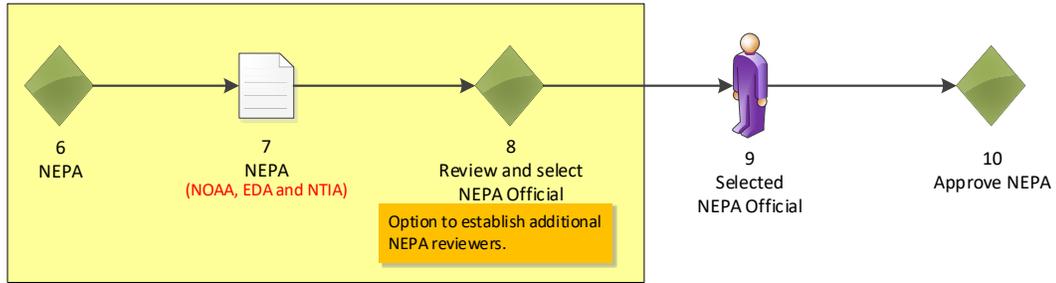
(NEPA - NOAA, NTIA, EDA Only)

In the Universal application process, the Provisional Organization workflow is initiated at the same time as the PO Checklist, NEPA, and Procurement Request when the FPO selects “Negotiations Complete.” However, the Organization Profile task for the Provisional Organization Workflow is not in the FPO’s Inbox. Rather it is created in the Inbox of a new Grants Online user called the Data Quality Validator. The FPO can monitor the progress of the Organization Profile by checking under “Pending Actions” on the Award File launch page.

- Until the Provisional Organization workflow is completed, the FPO will not have an option to Certify the PO Checklist and the Budget Officer will not have an option to Approve the Procurement Request.
- The user will have either two (2) or three (3) new tasks in his/her Inbox. (If there are no new tasks in the Inbox, click the Inbox tab to refresh the screen display.) Only NOAA, NTIA, and EDA receive the NEPA Document. The other bureaus only receive the PO Checklist and the Procurement Request.
- An Award File has also been created in the database. These tasks will move along separate workflow paths but will become a part of the same Award File in the Grants Specialist’s Inbox. The tasks do not have to be completed in any particular order. However, the Grants Specialist may return an “incomplete” Award File to the FPO. The Grants Specialist cannot proceed to the next step until all documents that comprise the Award File are complete. The user should periodically check the Workflow History to ensure the Procurement Request (and if appropriate the NEPA) have completed their approval process before forwarding the Award File to the Grants Specialist. (The task with the option to forward the Award File to the Grants Specialist appears after the user completes the PO Checklist.)
- For a detailed discussion of the rules associated with *Principal Place of Performance*, please refer to the following training manual:

https://content-drupal.noaa.gov/sites/default/files/atoms/files/PPPER_Quick_Reference_Guide.pdf

NEPA Checklist



NEPA Environmental Review Requirements - NA19NOS4730012

Attachments:

No attachments.

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

[Guidance](#)

a.) Level of Review *

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

Categorical Exclusion (Attach memo if required.)
[Select/View CE](#)
 Nothing found to display.

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

Record of Decision associated with Environmental Impact Statement.

Other - Explanation in Attachment.

b.) Mitigating Measures

If either an EA or EIS was completed, did the analysis of the environmental impacts require the implementation of one or more mitigation measures?
 NO YES [Special Condition](#)

c.) Post Award NEPA Review Process

Does the proposal include funding for one or more projects that have not yet been identified and therefore NEPA review cannot be completed?
 NO YES [Special Condition](#)

d.) National Historic Preservation Act

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

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

Please Select a NEPA Official for routing purposes:

Save Save and Return to Main Cancel

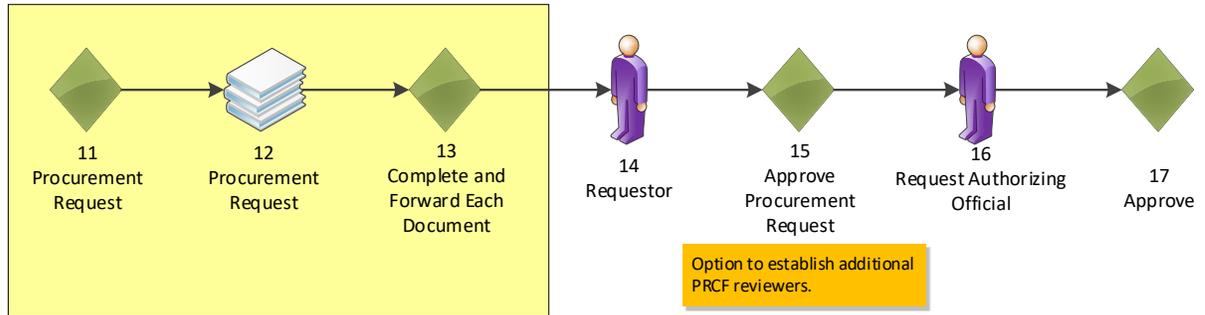
Categorical Exclusions

CE Category	CE Description
<input checked="" type="checkbox"/> 6.03a.3 (b)	Management plan amendments.
<input type="checkbox"/> 6.03a.3 (b)(1)	Management plan amendment may be categorically excluded from further NEPA analysis if the action and the proposed change has no effect individually or cumulatively on the human environment, and a copy of the amendment is submitted to the NEPA Coordinator, and a brief statement with 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 funding). (40 CFR 1508.4).
<input type="checkbox"/> 6.03c.2	Examples of Restoration Actions Eligible for a CE.

From the Action Dropdown menu, select “Complete NEPA Document” and click the Submit button. The NEPA Details screen displays three 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.

- For this class select “Internal Reviewer” as the NEPA Official. After clicking Save and Return to Main, select “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.”

Procurement Requests



Request Authorizing Official: *

Name	Title	Telephone	Action
EDA Budget and NEPA Official		303-555-1212	Change

Additional Reviewers:
Nothing found to display.

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

Requestor: *

Name	Title	Telephone	Action
Corey Dunn		512-381-8169	Change

The ACCS is valid

Validated: true

Bureau (xx): * 20

Fund (xx): * 40

Fiscal Year (yyyy): * 2020

Project - Task: * E000025 - 000

Program Code: 30 - 11 - 00 - 000

Organization: * 99 - 00 - 0000 - 00 - 00 - 00 - 00

Object Class: * 41 - 11 - 00 - 00

Amount: * \$2,000.00 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
20	40	2020	99-00-0000-00-00-00-00	30-11-00-000	E000025-000	41-11-00-00	\$2,000.00	N	Yes

Federal Share: * \$ 4,000.00 Requisition Number: * EDG00000000301

Affected Reference Number: NA16NMF4130006 EIN: 987654321 DUNS: 123456789

To: * Description: *

TEST ORG INC.
123 Germantown Road Germantown, MD
20876

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

Accounting - ACCS Lines *

One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWValidated	Action
20	40	2020	99-00-0000-00-00-00-00	30-11-00-000	E000025-000	41-11-00-00	\$2,000.00	N	Yes	Edit Delete

Add New ACCS Line

PRCF Total for this Award action: \$2,000.00

Total Federal funds authorized for this Award action: \$4,000.00

Next, select the “Procurement Request” task from the Inbox and then select “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. If this is a multi-year award we will discuss how to fund the out-years during the Partial Funding module.

- Fill in Authorizing Official (Internal Reviewer) and Requestor (During class each student should use his/her own training ID (e.g., gstudent01). Select Save.
- 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.

ACCS Lines (Accounting Codes)

- The user must supply data for the ACCS Lines. To complete this task, select 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.

After entering the ACCS information:

1. Click the **Save** button.
2. Click the **DWValidate** button to validate the data against the CBS Data Warehouse tables. If the validation is successful, the Program Code is populated.
3. 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 data element.
4. Click the **Cancel/Done** button to return to the previous screen.
5. Continue to process and forward the Procurement Request as usual.
6. **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

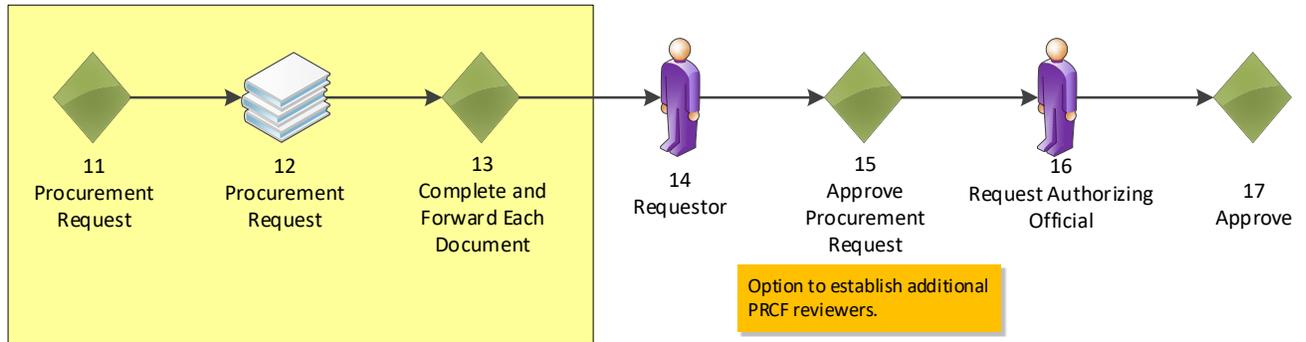
Amount: \$1,250.00 Prior Year Fund: No

Save DWValidate Cancel/Done

Add New ACCS Line

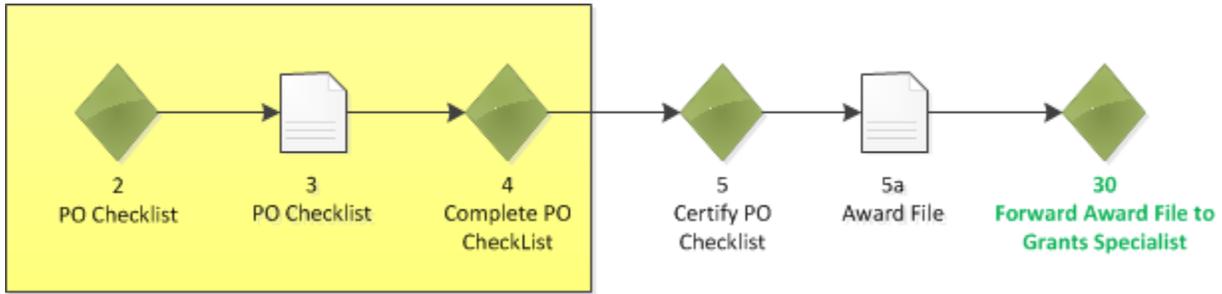
One item found.1

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



- 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.”
- If the user needs to create more than one Procurement Request to send through different approval routes, s/he can select “Create New Procurement Request.” Remember, if there is more than one Procurement Request for an Award, the total funding for all requests must be equal to or less than the Total Federal Funds.
- Select “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 select “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. Select “Approve Procurement Request” from the dropdown menu.

PO Checklist



PO Checklist - NA20GOT9980016

Attachments:
No attachments.
Add new Attachment: [\[+\]](#)
Any changes to information on this page should be saved before adding or removing attachments. File name
[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 Condition](#)

Statutory Authority * [Guidance](#) [Audit Trail:](#)

Project Description/Abstract * [Guidance](#)

[Spell Check](#)

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

Basis of Selection * [Guidance](#)
 Competitive
 Non-Competitive
 Congressionally Directed (Soft Earmark)
 Institutional (designated by Grants Office)
 Formula/Allotment
 Congressionally Mandated (Hard Earmark)

Project Progress Reports [Guidance](#)
Any changes to these values will be applied to the entire grant.

Frequency
 Semi-Annually
 Synchronized to the Federal Financial Report periods
 Annually (for multi-year/institutional)
 Quarterly
 Not Required (for "No Special Purpose" awards). No final report required. Final report selection is
 Not Required (for Single Year awards). One report, covers award period up to 12 months and is d

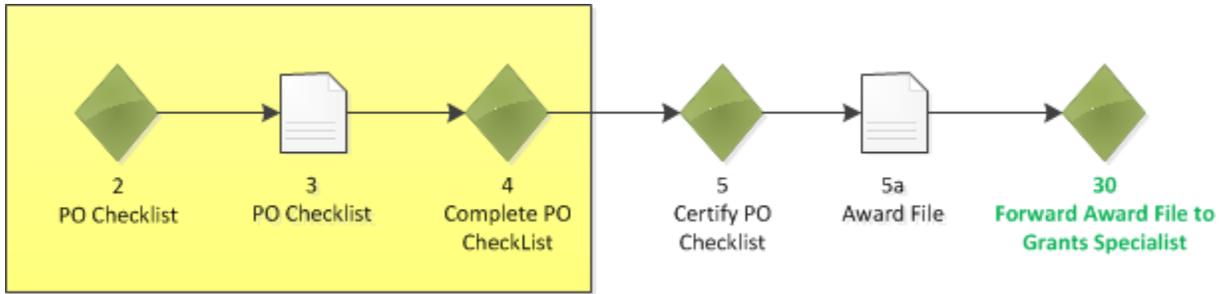
Final Report
 Comprehensive - a last interim report is required
 Comprehensive - a last interim report is not required
 Last Report

[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 and the above values will be ruled in favor of the Specific Award Condition. If no Specific Award Condition award will require the default values as defined for the Agency in the Bureau (or Department) Standard

Conflict of Interest/Post Employment Restrictions [Guidance](#)
 Is there a former DOC employee working for the applicant who represented or will represent the applicant involved in the merit review and/or selection process?
 NO YES
 If YES, please attach files below.



Matching Requirements: * [Guidance](#)

a. Federal Share Amount	b. Required Non-Federal Share Amount	c. Required Cost Share % of Total (Federal + Non Fed)	d. Funding Source / Required Cost Share Explanation	Action
\$500,000.00	\$0.00	0.0	Source or Explanation of 0% Required Cost Share: None Required	Edit Delete

[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 C
 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*
 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

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](#)

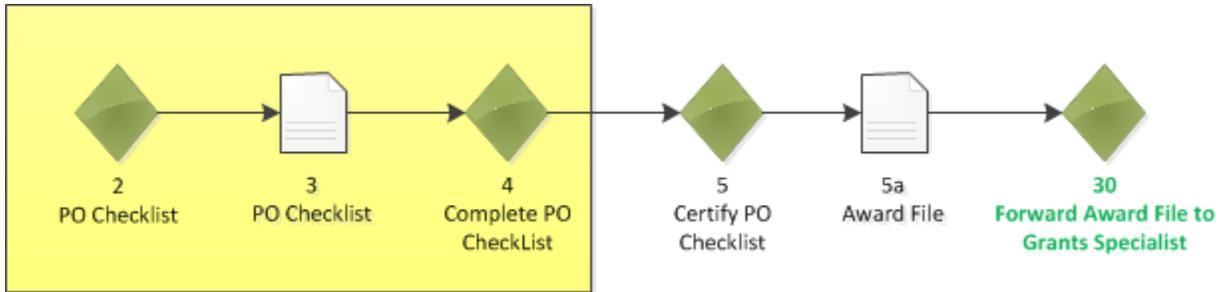
Programmatic Specific Award Condition

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

EDA Specific Information

[View/Edit EDA Specific Information.](#)



EDA-Specific PO Checklist Elements

Geographic Area of Project and Eligibility Information

Description of Geographic Area that qualifies for EDA Assistance:*

Jefferson County, Colorado; City and County of Denver, Colorado; El Paso County, Colorado; and Colorado Springs, Colorado to host the Americas Competitiveness Exchange (ACE) to pursue economic links with economies from more than 25 countries.

[Spell Check](#)

Eligibility Determination Based On (choose one):*

Not Applicable

Date/Event of Eligibility Determination:*(MM/YY)

Per Capita Income Applicant Eligibility US C 36,607 31,177
 Unemployment Rate
 Source 2017 PCPI (BEA)

If eligibility is based on a SPECIAL NEED, does the on how the proposed project will meet the special N/A

Need for the Project (Pressing Need/Economic Development):*

Colorado's industry clusters are comprised of a diverse range of innovative sectors, including aerospace, aviation, medical technology, energy and outdoor recreation.

ACE 13 will help Colorado urban and rural areas harness the power of collaboration to find new opportunities to foster regional and international partnerships.

ACE 13 will provide Colorado the opportunity to pursue innovations in mobility, sustainability, and emerging technologies.

[Spell Check](#)

Maximum Grant Rate Eligibility (%): 50

This project benefits an area which is primarily:

Regional/Multi-Jurisdictional

Anticipated Economic Benefit

Anticipated Economic Benefit:*

By the end of the ACE, participants will see how host communities in urban and rural areas of the Denver Region and their strategic clusters are ready to: Establish global commercial relationships and FDI partnerships among hosts and participants. Share and promote best practices in economic development to strengthen local innovation and entrepreneurship ecosystems. Showcase the importance and benefits of: Public-private partnerships to advance a coordinated regional economic development strategy that leverages local assets and present key lessons and paths defined by regional CEDS; A coordinated regional business plan to stimulate capital investment and job creation; Research to understand problems and develop tools to achieve environmentally sound economic

[Spell Check](#)

Estimated Jobs Created:*

(Number should reflect amounts after attribution is applied.) N/A 0

Estimated Jobs Saved:*

N/A 0

Estimated Private Investment Leveraged:*

N/A 0

Source of Grantee Estimates (check as many as apply):

- Letters from Beneficiaries of the Project
- Input/Output Model (e.g. IMPLAN, REMI)
- Comparison to Similar Projects
- Other Method (specify):
- Unknown Method

Project Beneficiaries:

No beneficiaries have been selected.

Additional Project Information

Special Initiative Codes:*

Primary	Special Initiative Code	Initiative Description	Active	Update Date
No	01	Regional Cooperation (Collaborative Reg. Innovation)	Yes	09/26/2019
No	02	Supports growing/emerging clusters (Collaborative Reg. Innovation)	Yes	09/26/2019
No	04	Federal Partners Participating (Public/Private Partnerships)	Yes	09/26/2019
No	05	State Partners Participating (Public/Private Partnerships)	Yes	09/26/2019
No	06	Local Partners Participating (Public/Private Partnerships)	Yes	09/26/2019
No	07	Foundations Participating (Public/Private Partnerships)	Yes	09/26/2019
Yes	27	Support Export Development and Assistance (Global Competitiveness)	Yes	09/26/2019
No	28	Attracts Foreign Direct Investment (Global Competitiveness)	Yes	09/26/2019
No	29	Encourages Commercialization and Tech Transfer (Global Competitiveness)	Yes	09/26/2019

NAICS Code that best describes the EDA project:*

925120

In the textfield above, enter the code that corresponds to the primary purpose of the project. NAICS codes can be obtained from: <http://www.census.gov/eos/www/naics/index.html>

Are reimbursables being used as EDA funds?*

No

Select the appropriate program under which this application will be funded:*

Select an Option

[Cancel](#)

The user now has one more task in his/her Inbox to complete for this application: **“Complete PO Checklist.”** Click on that task and go to the details page. Fill out this form carefully. Each section is important.

- **Attachments:**
 - If the Grants Online Review Module was not used for the competition/award, but a merit review was conducted outside of Grants Online, a copy of the review documents should be saved here.
- **Statutory Authority** – Data must be entered. The information can be modified by Grants Management; however, policy specifies that the FPO should enter complete and accurate information.
- **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.
- **Research Terms and Conditions** – **Generally, for EDA, this box should be checked “No.”** The effect of choosing “yes” on this page will allow a university to invoke a special authority to unilaterally extend their award for up to one year without Grants Officer approval. Additionally, on the CD-450, the DOC Standard Terms and Conditions are left unchecked; and in lieu of these, the Government-Wide Research Terms and Conditions are required.

In addition to Page 1 of the PO Checklist, EDA project officers also need to complete the “EDA Specific Information”.

- At the bottom of the PO Checklist, click “Save” and then select “View/Edit EDA Specific Information”.
- All Elements marked with an asterisk need to be completed on this page, however the Project Officer should complete as many fields as possible
- These fields include the following:
 - Description of Geographic Area that qualifies for EDA Assistance
 - Eligibility Determination Based On (Choose from drop down menu)
 - Date/Event of Eligibility Determination
 - Need for the Project
 - Benefit area geography type (Choose from drop down menu)
 - Anticipated Economic Benefit
 - Estimated Jobs Created/Saved and Private Investment Leveraged with supporting information as applicable
 - Special Initiative Codes
 - NAICS Code

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 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 Reservation of Funds, and the NEPA Checklist), have been fully 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.

Award File In Progress - ED16ATL3030059

Id: 2279929
Status: ProgramOfficerActions - Not Started

Action:

Your Comments:

Attachments:

Pending Actions 

2 items found, displaying all items.1

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status	Last Action Date	Last Action User
NEPA	2279932	12/17/2015	\$100,000.00	2016	Review NEPA Document: Not Started		EDA Reviewer
Procurement Request and Commitment of Funds	2279930	12/17/2015	\$100,000.00	2016	Review Procurement Request and Commitment of Funds: Not Started		EDA Reviewer

After all the required tasks are completed, the red “X” will change to a green checkmark, signifying that the file is ready to move to the Grants Specialist workflow.

Award File In Progress - ED16ATL3030059

Id: 2279929
Status: ProgramOfficerActions - Not Started

Action:

Your Comments:

Attachments:

Pending Actions 

Nothing found to display.

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.

For more specifics on how to revise an approved procurement request or correct ACCS lines on a funding award, please reference the following user manual:

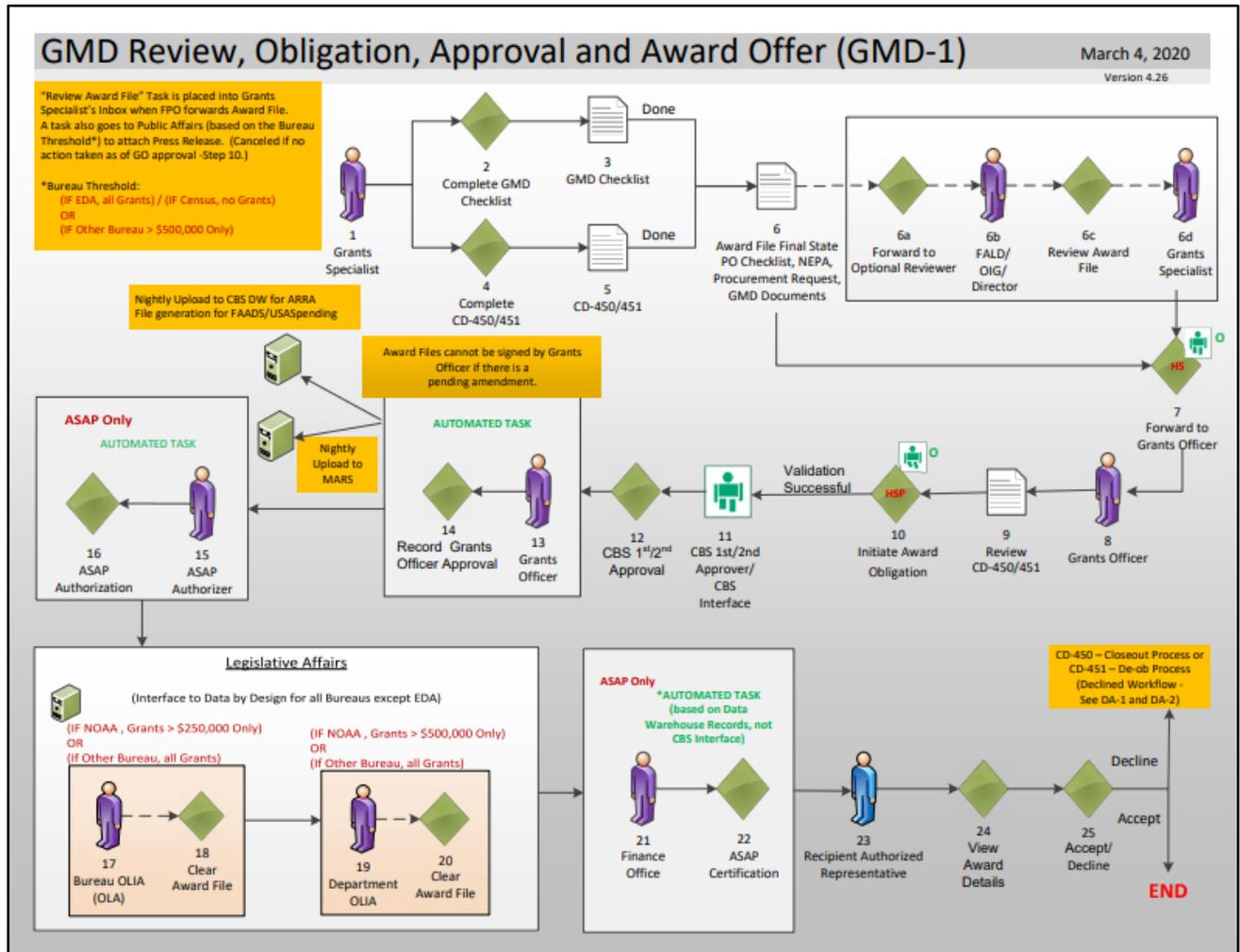
https://www.noaa.gov/sites/default/files/atoms/files/ACCS_Correction_Guidance.pdf

For more specifics on how to revise the components of an award package, please reference the following reference guide:

https://www.noaa.gov/sites/default/files/atoms/files/Renegotiations_QRG.pdf

Once all of the program tasks have been completed, the project officer should choose the “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. 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 (**see chapter on reassignments**).

Grants Management Process



General Information

- 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. Grants Management has 60 days to complete its review and approval process.
- If funds have been removed from the ASAP accounts 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 indicated as ASAP, the ASAP steps on this workflow will be skipped. Subsequently, the recipient must use an "Organization Profile Change Request" to initiate their ASAP enrollment after the award has been accepted. This process

must still take place even if a “Non-ASAP” organization was accidentally associated with the application instead of the ASAP record for that organization.

- For EDA, the OLIA and OLA tasks are manually cleared.

CD-450

Financial Assistance Award			
Recipient Name:	University of Maryland, Center for Environmental Science	Federal Share of Cost:	\$50.00
Street Address:	2020 Horns Pt 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	<input type="checkbox"/>
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 type="checkbox"/>	Award Specific Special Award Conditions		
<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 76390 DECEMBER 30, 2014)		Required

Do Not Pay should be checked when SAM.GOV has been checked and no issues found.

Attachments

NOTE: Only save FINAL documents to the CD-450/451 page.

Name	Short Description	Created Date	Internal Use Only
i6 2015 required metrics.pdf	i6 2015 Required Metrics	03/13/2015 11:28:41 AM	No
ED15HDQ0200001 - FINAL Line Item Budget.pdf	Line Item Budget	03/13/2015 01:19:48 PM	No
ED15HDQ0200001 - Authorized Scope of Work.pdf	Authorized Scope of Work	03/13/2015 01:32:05 PM	No
ED15HDQ0200001 - Special Award Conditions.docx	EDA Special Award Conditions	03/25/2015 12:24:41 PM	No

NOTE: Short Descriptions of all file attachments should be entered into the “Other” field on the CD-450 – this will ensure that they are included in the CD-450 “report” generated by the system.

<input type="checkbox"/>	American Recovery and Reinvestment Act of 2009 - DoC Standard Terms and Conditions
<input checked="" type="checkbox"/>	Other(s) <div style="border: 1px solid black; padding: 5px;"> Co-Recipient: Clemson University Land Stewardship Foundation, Inc. EDA Special Award Conditions This award is being made under competitive Federal Funding Opportunity Number EDA-HDQ-OIE-2014-2004219 posted at Grants.gov on 09/04/2014. </div>

Also note any Co-Recipients in the “Other” box, and be sure to add a specific award condition through the Grants Online interface to track whether the Co-Recipient has signed an “Acknowledgement and Agreement of Co-Recipient.”

Filename Conventions for CD-450 Attachments

1. Line Item Budget
 - a. File Name
 - i. Initial Award: “[Award Number] – FINAL Line Item Budget” (example: ED15HDQ0200001 - FINAL Line Item Budget.pdf)
 - ii. Amendment: “[Award Number] – Amendment [#] FINAL Line Item Budget”(example: ED15HDQ0200001 - Amendment 1 FINAL Line Item Budget.pdf)
 - b. Short Description
 - i. Initial Award: “Line Item Budget”
 - ii. Amendment: FINAL Line Item Budget Amendment [#] (example: Line Item Budget Amendment 1)
2. EDA Specific Award Conditions
 - a. File Name
 - i. Initial Award: “[Award Number] – Specific Award Conditions” (example: ED15HDQ0200001 - Specific Award Conditions.pdf)
 - ii. Amendment: “[Award Number] – Amendment [#] Specific Award Conditions”(example: ED15HDQ0200001 - Amendment 1 Specific Award Conditions.pdf)
 - b. Short Description
 - i. Initial Award: “EDA Specific Award Conditions”
 - ii. Amendment: EDA Specific Award Conditions Amendment [#] (example: EDA Specific Award Conditions Amendment 1)
3. Authorized Scope of Work
 - a. File Name
 - i. Initial Award: “[Award Number] – Authorized Scope of Work” (example: ED15HDQ0200001 - Authorized Scope of Work.pdf)
 - ii. Amendment: “[Award Number] –Authorized Scope of Work Amendment [#]”(example: ED15HDQ0200001 - Authorized Scope of Work Amendment 1.pdf)
 - b. Short Description
 - i. Initial Award: “Authorized Scope of Work”
 - ii. Amendment: Authorized Scope of Work Amendment [#] (example: Authorized Scope of Work Amendment 1)

GMD Checklist

GMD Checklist - ED19DEN3030029

Attachments:
No attachments.

 [_ \(No Comments\) - Comments](#)

Checklist Items	
Not Required	<input type="checkbox"/> Budget/Cost Analysis Memo
As Needed	<input type="checkbox"/> Property
Applicants Management and Financial Capabilities	
Required	<input checked="" type="checkbox"/> Delinquent Federal Debt
Required	<input checked="" type="checkbox"/> Single Audit
Required	<input checked="" type="checkbox"/> SAM Exclusions
Required	<input checked="" type="checkbox"/> Past Performance
As Needed	<input type="checkbox"/> Risk Recipient
Not Required	<input type="checkbox"/> Awards to Insular Area <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Not Answered
Required	<input checked="" type="checkbox"/> Grant Type <input type="radio"/> Cooperative Agreement <input checked="" type="radio"/> Grant
Required	<input checked="" type="checkbox"/> Confirm Financial and Progress Report Requirements
Required	<input checked="" type="checkbox"/> Review Specific Award Conditions
Required	<input checked="" type="checkbox"/> Project Details
Required	<input checked="" type="checkbox"/> Statutory Authority
Required	<input checked="" type="checkbox"/> Project Dates

DoNotPay check is complete

[View/Manage Recipient Organization](#)

Save **Save and Return to**

PAN AMERICAN DEVELOPMENT FOUNDATION, INC.

[Edit >>](#)

 [_ \(No Comments\) Internal Comments](#)
Note: These comments are for internal use only.

Audit Trail: 

Description

Grants Online Bureau	1000110 - Economic Development Administration (EDA)
Grants Online Org ID	2005589
Organization Type	External Recipient
Applicant Type	Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)

With multiple Bureaus in Grants Online, the Grants Specialist is encouraged to click on the View/Manage Recipient Organization link to confirm that the correct Bureau has been associated with the organization record linked to the award.

Checking SAM.gov

SAM.gov should be checked for “Delinquent Debt”. **Check with Bernadette to see if List for parties excluded is still being checked – no longer on the Grants Online screen.**

When SAM.gov is checked, a screenshot of the search results should be uploaded to the Organization Profile for the applicant, and the date of the search should be filled in to the relevant fields. The description of the SAM.gov screenshot should include the name of the applicant and the date of the search, e.g.: “SAM.gov check for SRI International 20150917”.

Grants Management - Risk Review
Risk Recipient true
[Do Not Pay Information](#)
[SAM Information](#)
[Federal Awardee Performance and Integrity Information System \(FAPIIS\) Information](#)
[Negotiated Indirect Cost Rate Agreements \(NICRA\) Information](#)
[Other Information](#)

Grants Online Specific
Grants Management - Do Not Pay
Delinquent Debt Review Date
Delinquent Debt Found Yes No
Attachments:
No attachments.

Grants Online Specific
Grants Management - SAM
Is the Party excluded from Procurement/Non-Procurement Activities Yes No
Date of Check for Exclusion from Procurement/Non-Procurement Activities
Date Party was excluded from Procurement/Non-Procurement Activities
CAGE CODE:
SAM ACTIVATION DATE:
SAM EXPIRATION DATE:
Attachments:
No attachments.

Checking for the most recent Single Audit

Similarly, after checking the Clearinghouse for the applicants’ most recent single audit, the relevant details should be completed on the Organization Profile for the applicant; a copy of the audit does not need to be attached if enough information is completed in order to access it again on the Clearinghouse; however, if there were no records found in the Clearinghouse, a screenshot of the search should be attached. Any relevant questioned costs or findings should be addressed in the Comments box.

Specific Award Conditions

Specific Award Conditions

[Create From Scratch](#)

Available Specific Award Conditions

Name	Description	Options
Matching Requirement	Since this award requires the Recipient to provide \$(From matching requirement on CD-450 or 451) in project-related costs from non-federal sources, the Recipient must maintain in its official accounti	Template
Technical Monitor	The Technical Monitor for this award is:	Template
Project Milestones	To ensure adequate and timely progress towards project completion and achievement of the goals of the Recovery Act with respect to project timing and associated expenditure of funds, NOAA and the gran	Template

Specific Award Condition Details

Name: *

Description: *

[Spell Check](#)

Association Edits:

Response Required: Due Date: (mm/dd/yyyy) Satisfied Date:

Type: Administrative Pending

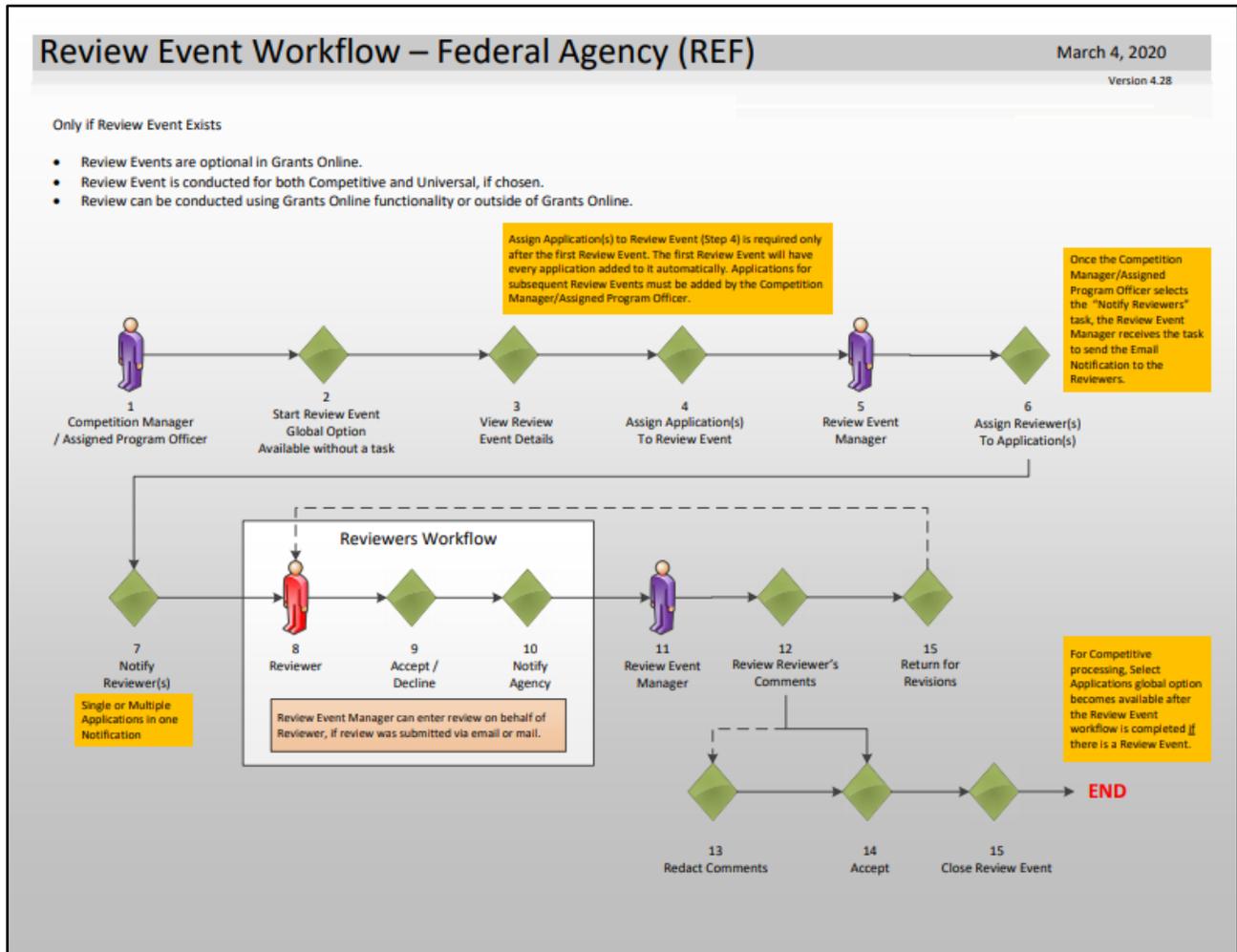
[Save](#) [Save and Return to Main](#) [Cancel](#)

- Clicking a template will pull up stock language for any given Specific Award Condition. This language can then be edited for that particular award.
- All Specific Award Conditions entered through this screen will be aggregated into a PDF that is automatically attached to the CD-450/451.
- Checking “Response Required” will allow you to track the grantee’s progress in fulfilling a particular award condition.

Processing a Competitive Application

(Regional Innovation Strategies Program Example)

Merit Review Module - Managing a Review Event



This applies to our Build to Scale (formerly Regional Innovation Strategies) program which follows a true competitive process where applications are assigned to reviewers, scores are recorded and analyzed, and funding decisions are made based on scores and other pertinent criteria set forth in the NOFO.

Independent Individual Merit Review

Id: 2279925
 Status:

Action: Please select an action Submit

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

Spell Check

Save Comment

Independent Individual Merit Review

Id: 2279925
 Status: ManageReviewEvent - Not Started

Action: Please select an action Submit

Your Comments: Please select an action
Assign Applications To Review Event
Assign Reviewers To Applications
Close Review Event
View Review Event Details
View Review Event Summary

Save Comment

Workflow Analysis
 There is an open workflow task on the Review Event. All Review Events must be completed through closeout before applications can be selected for funding.

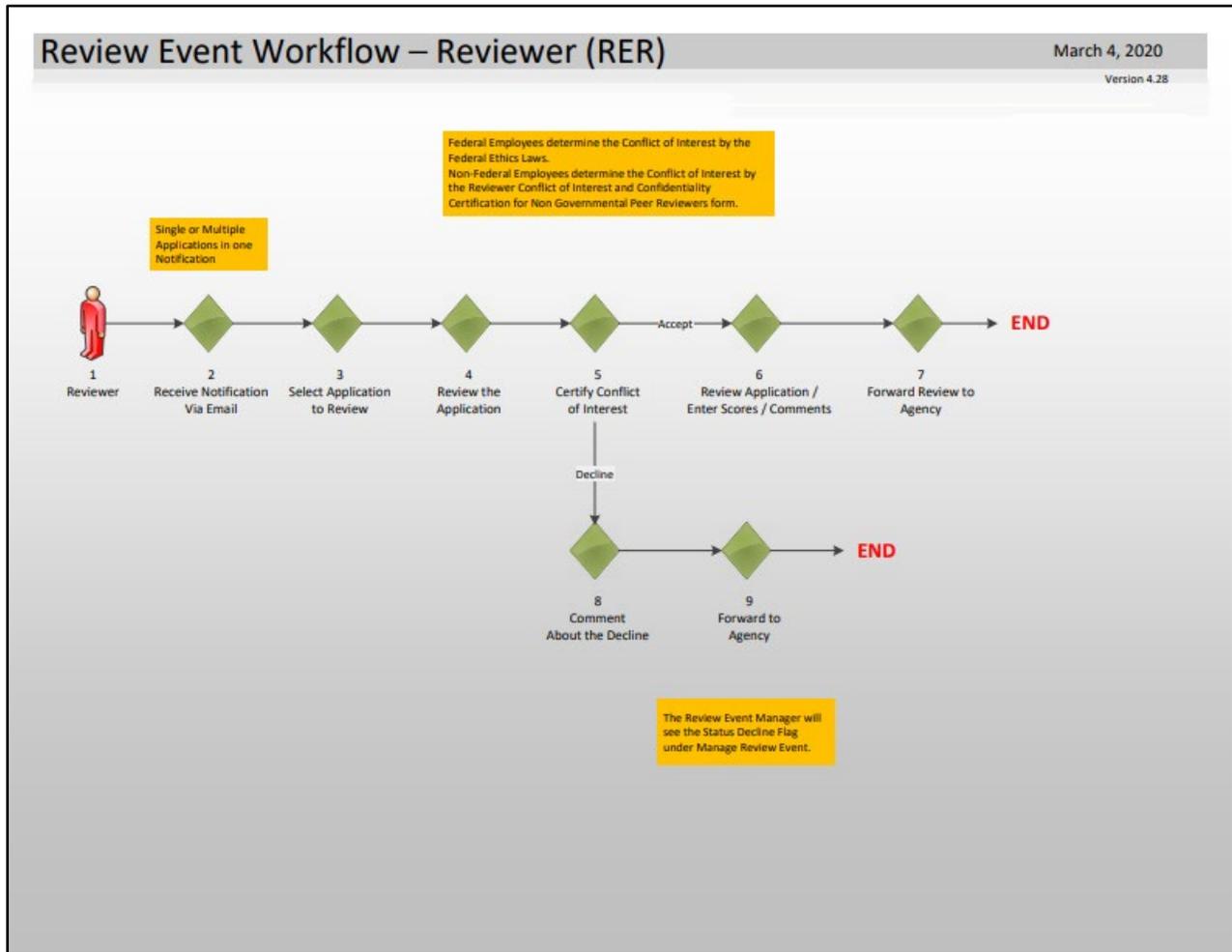
Workflow History

Name	Date Assigned	Date Started	Date Completed	Performer	Role	Action Taken	Current Status	User Co
Start Review Event	11/02/2015 05:10:13 PM	11/02/2015 05:10:13 PM	11/02/2015 05:10:13 PM	Chris A. Student25		StartReviewEvent	Complete	

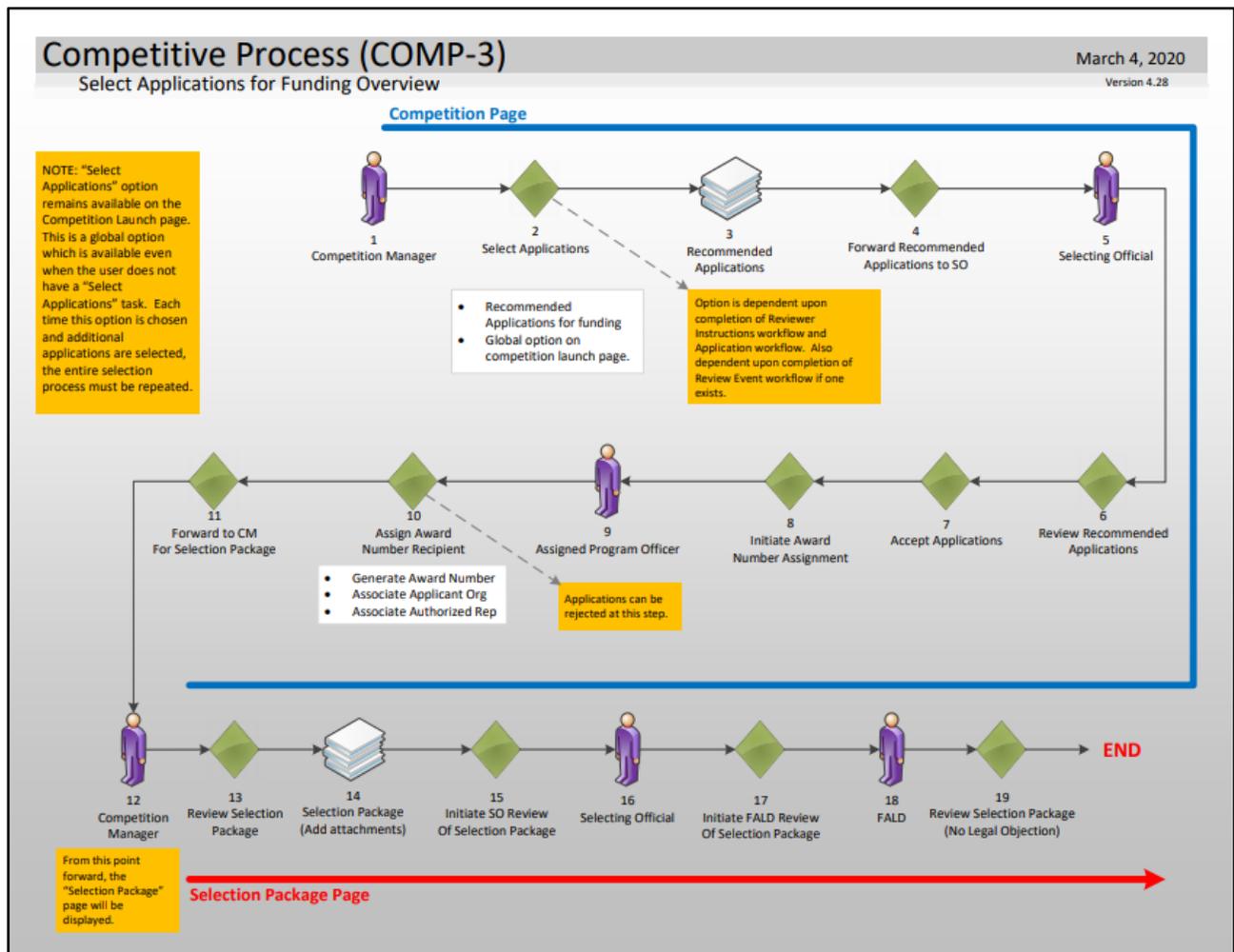
Export options: [Excel](#)

- Initially there is not a Review Event task in the Inbox. Therefore, the Competition Manager should navigate to the Review Event Launch Page (from the sub-documents section of the Competition Launch Page). When the Competition Manager completes that process, the “Start the Review Event” option is now available on the Action dropdown menu. Remember, the option to Start the Review Event will only be available if the Reviewer Instructions task has been completed by FALD.
- When the Review Event has been started by the Competition Manger a “Manage Review Event” task goes to the Review Event Manager.

Merit Review Module - Reviewing an Application



Selection Package



Steps 1-4

- The Competition Manager is responsible for reviewing the recommendations from the merit reviewers and creating a list of recommended applications for the Selecting Official.

Steps 5-8

- The Selecting Official is responsible for reviewing the recommendations of the Competition Manager and finalizing the list of selected applications.

Steps 9-11

- During the class, the Select Applications workflow will be demonstrated using the Instructor's RFA. Students will have tasks at Steps 9-11 to assign award numbers to the application. This step is

functionally the same as the “Conduct Negotiations” step of the Universal Application Processing workflow.

Assign Award Number/Recipient

The “Assign Award Number/Recipient” task is now with each Assigned Program Officer:

Your Tasks

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

6 items found, displaying all items.1

View	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date	Completed Date	Award Number
View	3489953	Assign Award Number/Recipient	Not Started	Application	2443903			N/A
View	3489952	Assign Award Number/Recipient	Not Started	Application	2443878			N/A
View	3489916	Conduct Negotiations	In Progress	Application	2444004	03/11/2016		N/A
View	3489913	Forward/Revise Award File	In Progress	Award File	2443987	03/11/2016		NA16G0T9990001

- The requirements for this task are the same as the “Conduct Negotiations” task covered earlier.
- 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.
- When the Award number has been generated, click “Save and Return to Main.” Next, select the option to “Forward to Competition Manager for Selection Package.” After the last application has completed this step, the Competition Manager will receive the next task to Review the Selection Package. After the Competition Manager reviews the package, it can be prepared for approval by the Selecting Official and FALD.

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 not necessarily have more than one line of funding.

Create Selection Package

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 of 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 OCC 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 OCC 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.

Start Award Processing

To move forward with application processing, the Competition Manager selects 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.

The user should now have three (3) new tasks in his/her Inbox. If not, the user should refresh his/her Task screen (Do NOT use the browser’s “Back” button to refresh the screen display). An Award File has also been created in the database. These three tasks will move along three separate (but parallel) workflow paths. All three tasks, when completed, will comprise one “Award File” after it has been forwarded for Grants Specialist processing.

View Report: Application Report

RFA

Id: 2499961
Status: Published

Action: Please select an action Submit

Your Comments:

Spell Check

Save Comment

Attachments:

Competitive RFA Details

RFA Header Information

Document ID:	2499961	CFDA Number:	11.020
Announcement Type:	Initial	SubProgram:	
Funding Opportunity Number:	EDA-HDQ-OIE-2014-2004219	Assigned Program Office:	Office of Innovation and Entrepreneurship (OIE)
Line Office:	EDA Headquarters (HDQ)	Assigned Program Officer:	Andria Fisanich
RFA Name:	FY 2014 Regional Innovation Strategies Program	Anticipated Publication Date:	08/21/2014
Fiscal Year:	2014	Publication Date:	09/04/2014

Sub Documents

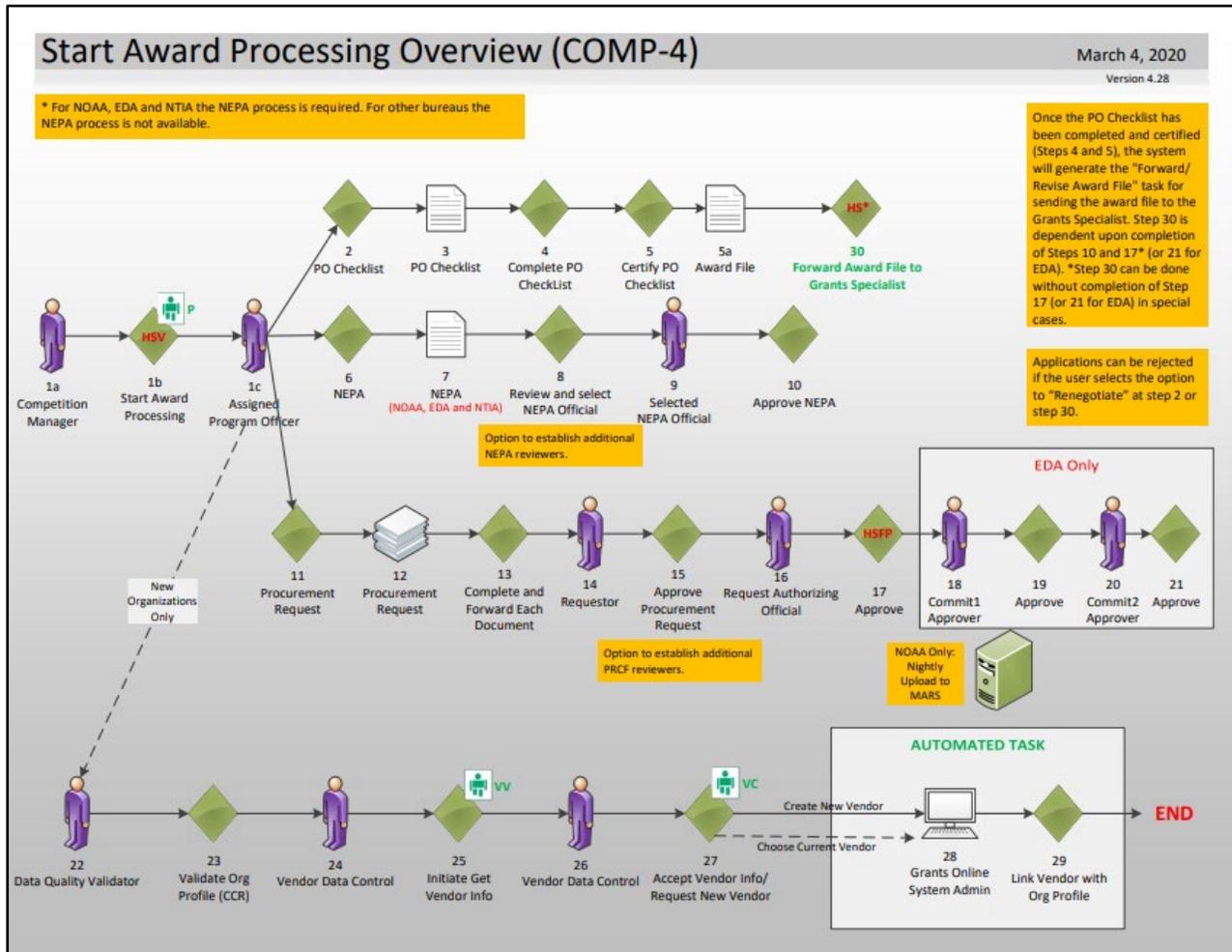
Type	ID	Title	Status
Applications Report	2499961	Applications Report	
Competition	2500007	FY 2014 Cluster Grants for Seed Capital Funds	CompetitionManagerActions - Complete
Competition	2499994	FY 2014 Science and Research Park Development Gran...	SelectingOfficialActions - Complete
Competition	2499973	FY 2014 i6 Challenge	CompetitionManagerActions - Complete
Federal Funding Opportunity	2500036	FY 2014 Regional Innovation Strategies Program	Publish - Complete

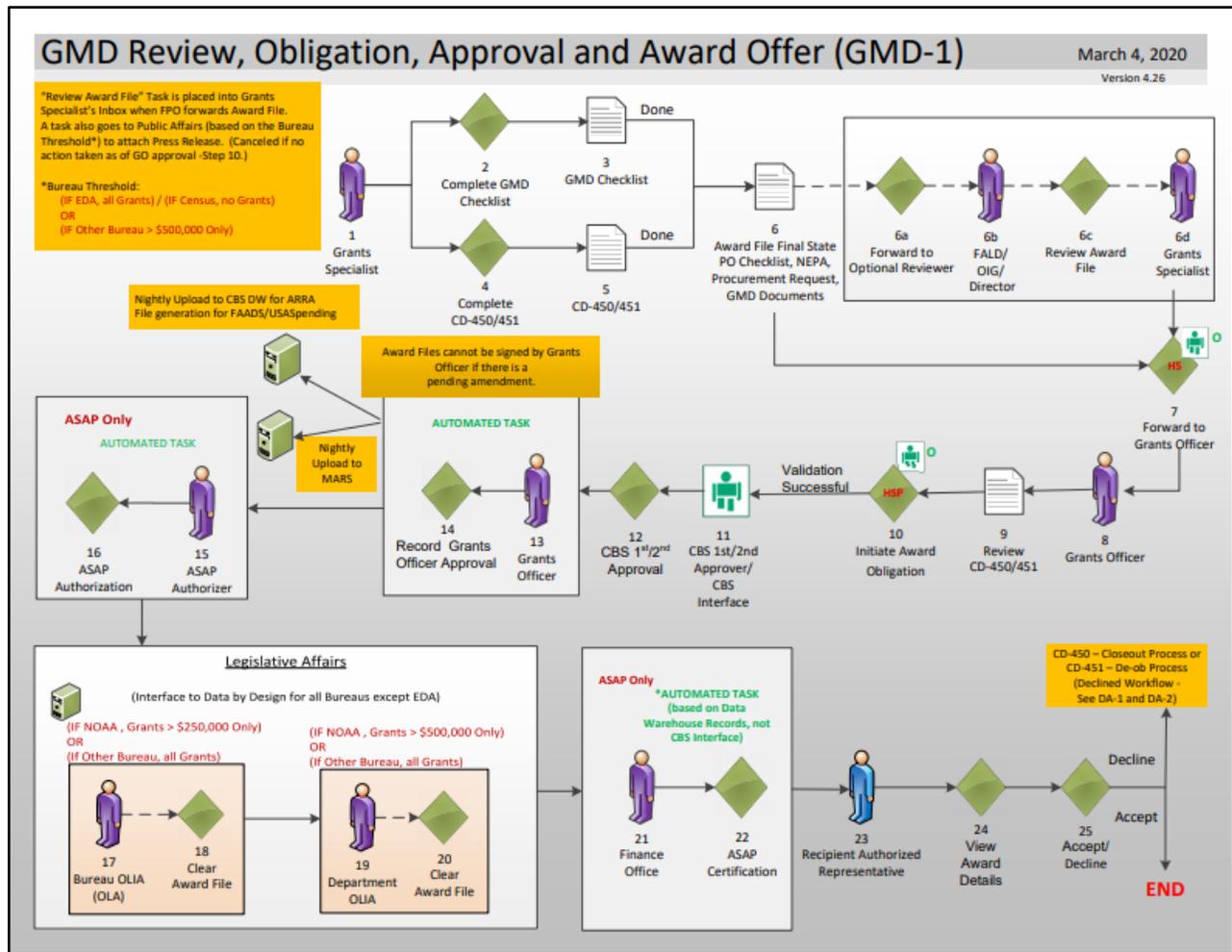
Export options: [Excel](#)

Click the ID link to download an excel file that shows all applications associated with the RFA, contact information for the authorized representatives, and the disposition of the application in the application review process (note: status does not update to follow the application after selection, so if an application is awarded, the awarded status is not reflected here).

There is a similar link under each competition, which will limit the results to just that competition.

Review of Application Processing Maps





Recipient Award Acceptance

See the Recipient Quick Reference Guide:

https://www.noaa.gov/sites/default/files/atoms/files/GrantRecipients_Quick_Ref_Guide.pdf

NOTE: If the authorized representative identified on the application turns out not to be the person who needs to accept the award at the organization, they must call the Grants Online helpdesk in order to designate a new person to accept the award on behalf of their organization. EDA cannot change the authorized rep once the award has been signed by the Grants Officer.

View Report: Award Tracking Report

EDA
U.S. ECONOMIC DEVELOPMENT ADMINISTRATION

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

Welcome to Grants Online Kerstin Millius. Your password expires on 12/31/2011. You are logged in to PROD2T. [Log Off](#)

Award Tracking Report

Advisories >> Search RFAs >> RFA >> Application - ED15HDQ0200023 >> Grants File - ED15HDQ0200023 >> Award File 0 - ED15HDQ0200023 >> Comp

Report Parameters - Award Tracking

Note : Summary results of years prior to FY 2003 will be incomplete.

Start Fiscal Year * (use format YYYY)

End Fiscal Year * (use format YYYY)

Bureau

Line Office

Program Office

FPO

CFDA Number

Funded Only Yes

Award Number

Recipient Name

Recipient City

Recipient State

Congressional District within State

Recipient Type

Signed Award Only Yes

Award Start Date (MM/DD/YYYY)

Award End Date (MM/DD/YYYY)

Grant Officer Sign Date Between (MM/DD/YYYY) and

Method of Selection:

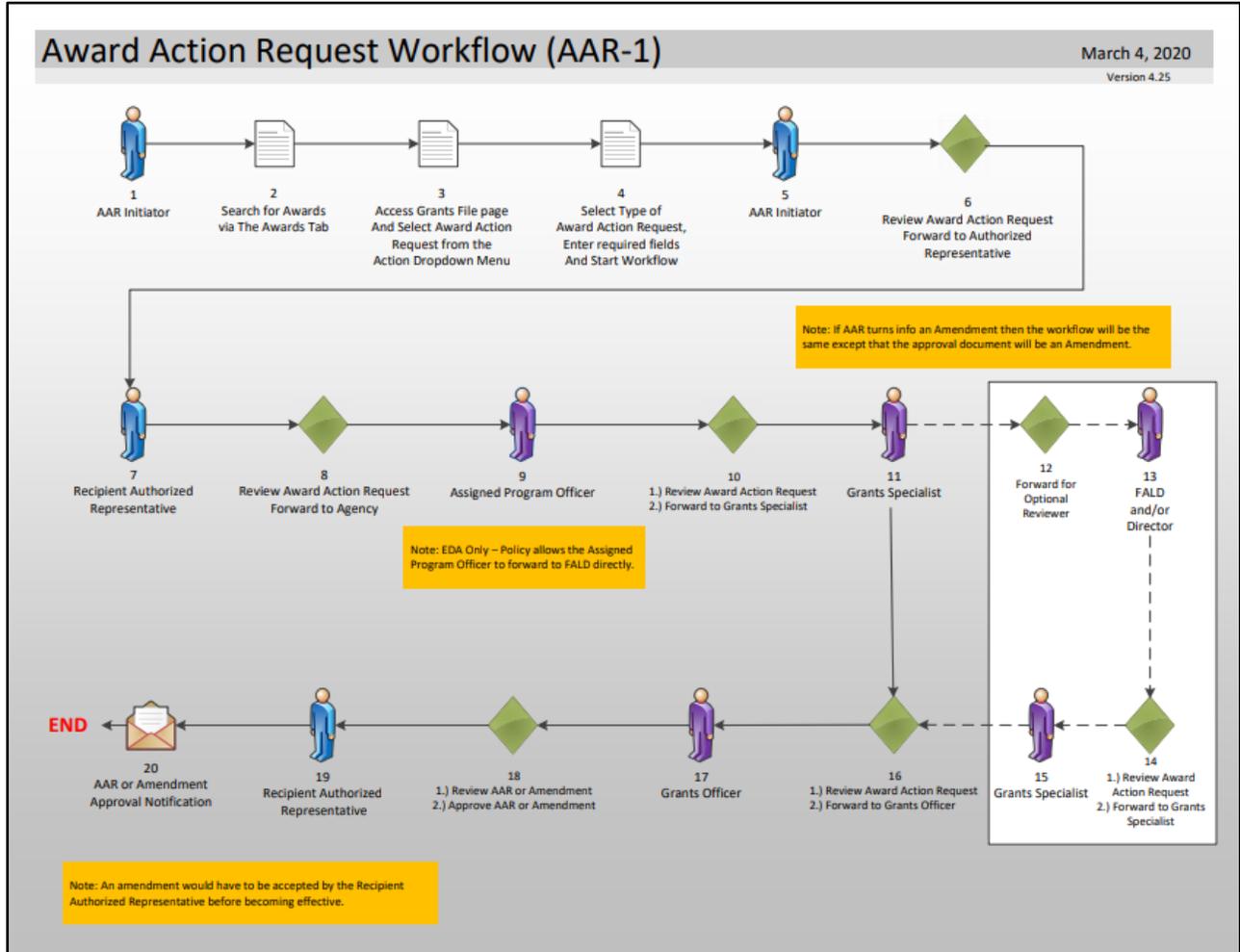
Run Report **Cancel**

This is the only “customizable” report for general award information in Grants Online. There is a production control report service available, for more information contact the Grants Online Help Desk.

Post Award Processing

Award Action Requests

General Award Action Request Workflow



Award Action Request Index Page

Award Action Requests marked with an asterisk (*) will always result in an amendment (CD451) 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:

https://www.noaa.gov/sites/default/files/atoms/files/Recipient_AAR_Help.pdf

[* No Cost Extension - Prior Approval Required](#)

[Extension to Close Out](#)

[Change in Principal Investigator/Project Director](#)

[Change in Key Person Specified in the Application](#)

[Satisfy Specific Conditions](#)

[Transfer of Funds Budgeted for Participant Support Costs to Other](#)

[Categories of Expense](#)

[Rebudget - Prior Approval Required](#)

[Pre-Award Costs More than 90 Days](#)

[Submit Additional Closeout Documents](#)

[Other](#)

[No Cost Extension - Prior Approval Waived \(Research Terms and Conditions\)](#)

[* Change in Scope](#)

[Foreign Air Carrier for Travel](#)

[Disengagement for More Than 3 Months, or 25% Reduction by Project Director or PI](#)

[Inclusion of Costs Requiring Prior Approval in Cost Principles](#)

[* Subaward, Transfer or Contract Out Work Under the Award if Not Described in the](#)

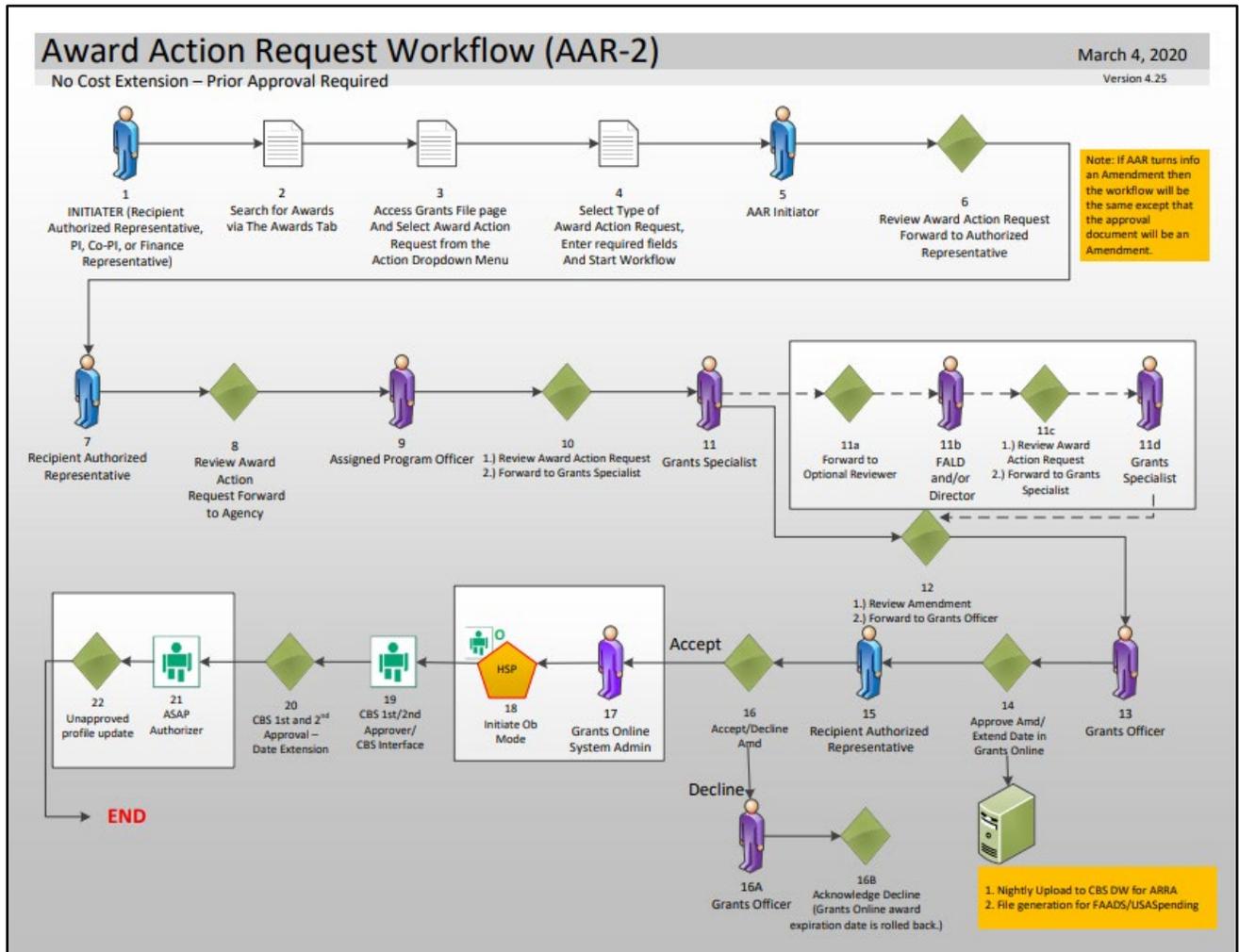
[Approved Application](#)

[Re-budget - Prior Approval Waived \(Research Terms and Conditions\)](#)

[* Termination by Consent](#)

[ASAP Drawdown Request](#)

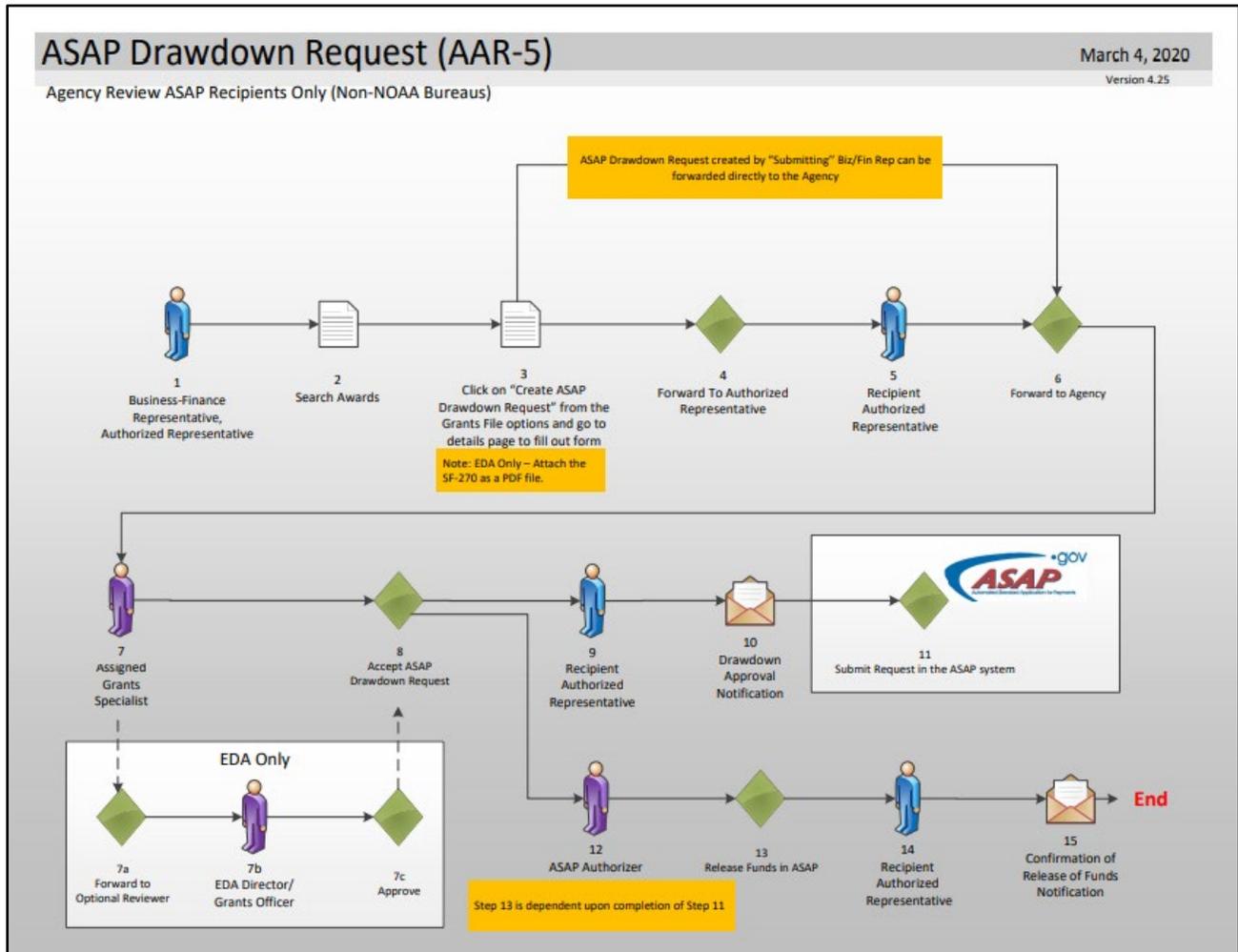
No Cost Extension



For No Cost Extensions, since project date updates are now going to be updated at CBS, the workflow will go through the CBS approval process. For ASAP awards a task will go to the ASAP Authorizer to update the ASAP profile with the new date.

Financial and Progress Reports

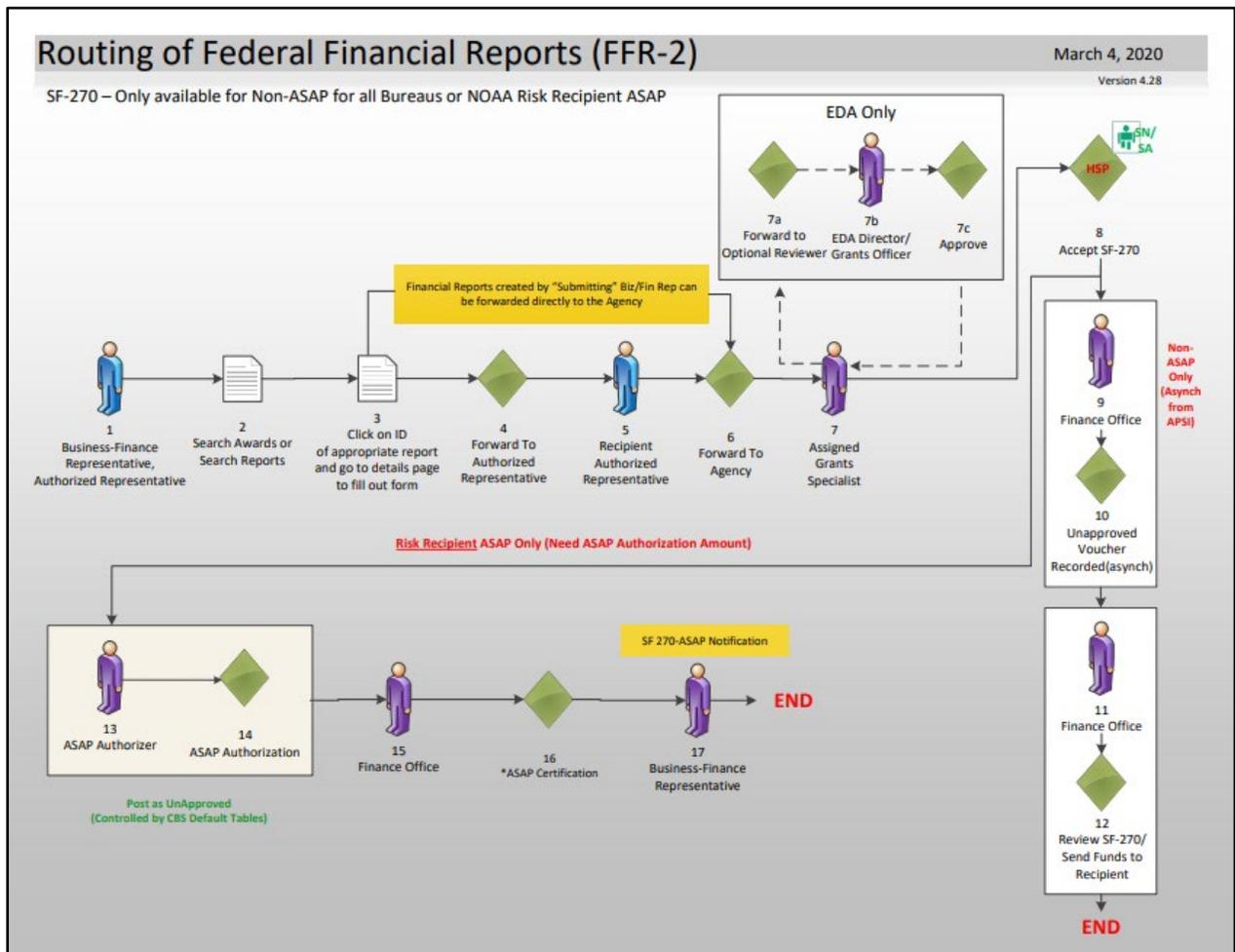
ASAP Drawdown Request



* No Cost Extension - Prior Approval Required
 Extension to Close Out
 Change in Principal Investigator/Project Director
 Change in Key Person Specified in the Application
 Satisfy Specific Conditions
 Transfer of Funds Budgeted for Participant Support Costs to Other Categories of Expense
 Rebudget - Prior Approval Required
 Pre-Award Costs More than 90 Days
 Submit Additional Closeout Documents
 Other

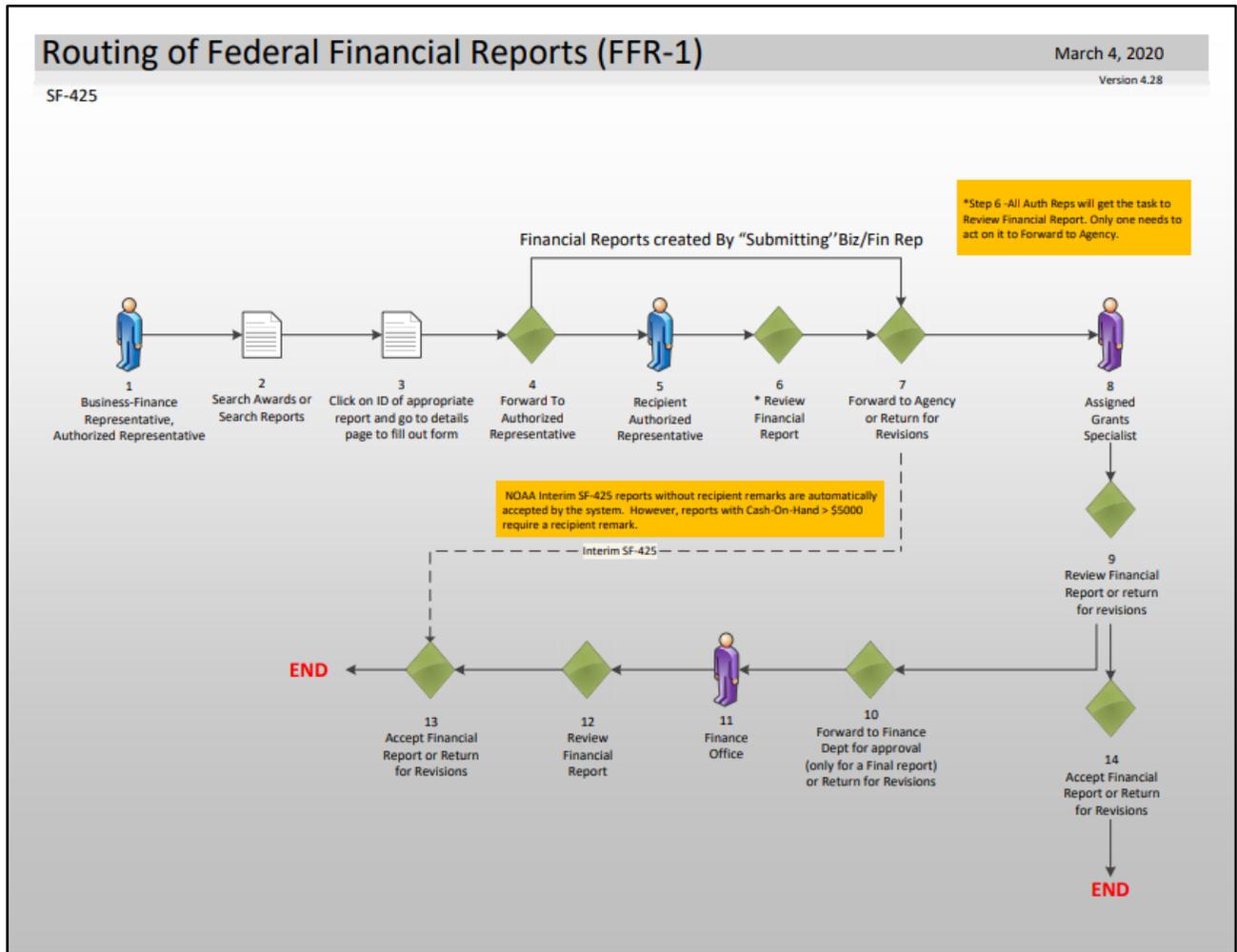
No Cost Extension - Prior Approval Waived (Research Terms and Conditions)
 * Change in Scope
 Foreign Air Carrier for Travel
 Disengagement for More Than 3 Months, or 25% Reduction by Project Director or PI
 Inclusion of Costs Requiring Prior Approval in Cost Principles
 * Subaward, Transfer or Contract Out Work Under the Award if Not Described in the Approved Application
 Re-budget - Prior Approval Waived (Research Terms and Conditions)
 * Termination by Consent
 ASAP Drawdown Request

SF-270



The option to submit a SF-270 is now only available to Non-ASAP recipients. A new Award Action Request has been created for ASAP Recipients on the Agency Review process, who wish to inform the agency that a drawdown request has been submitted in ASAP. (See ASAP Drawdown Request AAR.)

Federal Financial Report



Performance Progress Reports

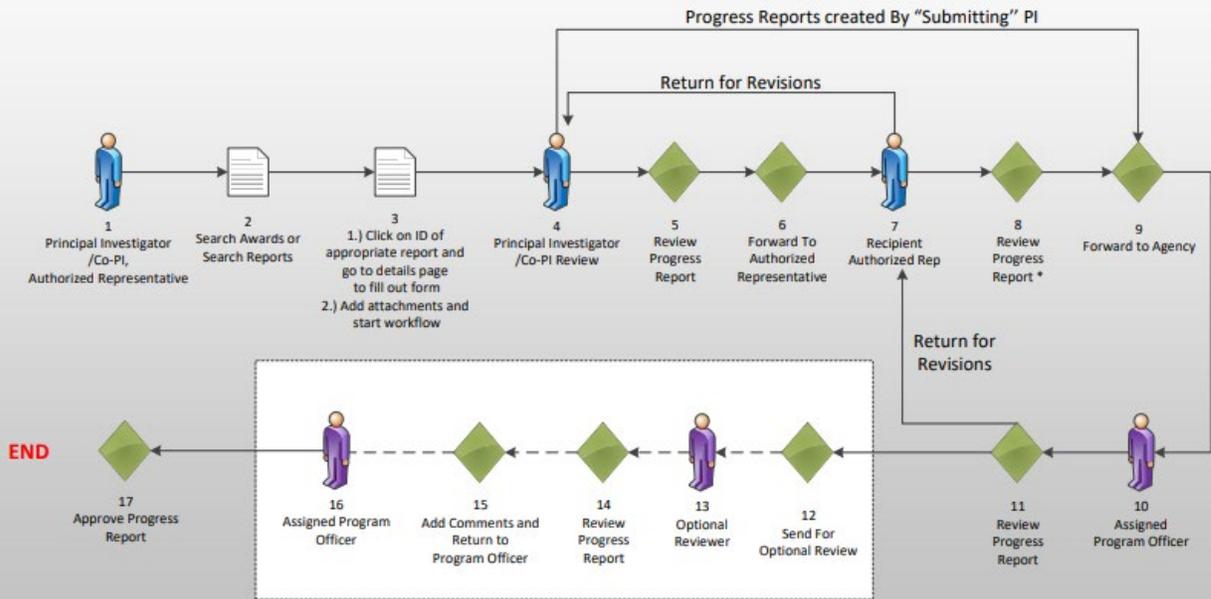
Routing of Performance Progress Report (PPR-1)

March 4, 2020

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.



View Report: Satisfied Specific Award Conditions

Navigate to the Grants File for the award.

Scroll Down to “Sub Documents” and click “Specific Award Condition Report.”

Sub Documents				
Type	ID	Title	Status	Status Date
Award Package	2813140	TEST RECORD - Identifying Co-occurrence Between Wh...	Accepted	06/28/2019
Specific Award Condition Report	2813140	Specific Award Condition Report		
Award File 0	2811037	TEST RECORD - Identifying Co-occurrence Between Wh...	Accepted	06/14/2019

Export options: [Excel](#)

Grantees must submit an award action request for Satisfied Specific Award conditions in order to document that a Specific Award Condition has been fulfilled.

Search Awards

Award Number:

Recipient Name:

Project Title:

Award Status:

PI-PD Last Name:

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.

Search Results

26 items found, displaying all items.1

Award Number	Org ID	Recipient Name	Project Title	Award Status	Priority
NA09GOT4990038	2001932	Institute for Culturally Managed Resources (ICMR)	TEST RECORD - Grants Online Training Application05	Accepted	None
NA09GOT4990027	2001932	Institute for Culturally Managed Resources (ICMR)	TEST RECORD - Grants Online Training Application07	Accepted	None Designated
NA09GOT4990008	2001932	Institute for Culturally Managed Resources (ICMR)	TEST RECORD - Grants Online Training Application	Accepted	None Designated
NA09GOT4000034	2001032	Institute for	TEST RECORD - Grants	Accepted	None Designated

Grants File - NA09GOT4990038

Id: 2139154
Status: Accepted

Action:

Your Comments:

1. From the Award Tab, search for the Award that will be Partially Funded.
2. From the Grants File Launch Page select "Partially Fund this Award" from the Action dropdown list.
3. Click the "Submit" button.

Partial Funding -- NA09GOT4990038

Memo * [Guidance](#)

Approved Plan and Prior Obligations

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

Selected Application

None

Approved Plan and Prior Obligations

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

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

4. Click the “plus” (+) beside the Action box to get details for the appropriate application for Partial Funding. (All applications associated with the Award will be available. However, Partial Funding can be applied to only ONE application at a time.)
5. Click the “Select” button to choose the desired application.
6. In the Memo box, provide a detailed explanation of why the partial funding action is being completed (new year in a multi-year award, additional available funding after appropriations are passed following a CR, etc).

Partial Funding -- NA09GOT4990038

Memo* [Guidance](#)

Enter appropriate memo language here. See guidance.

Spell Check

Windows Internet Explorer



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

OK

Cancel

Selected Application

Application ID	Approved Fed Share	Remaining Fed Share	Pending Fed Share	Fed Add Amount*	Approved Non-Fed Share	Remaining Non-Fed Share	Pending Non-Fed Share	Non-Fed Amount	AMD No.	Project Title
2139113	\$500,000.00	\$375,000.00	\$325,000.00	\$0,000.00	\$0.00	\$0.00	\$0.00	0.00	0	TEST RECORD - Grants Online Training Application05

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

7. Enter the amount for Partial Funding into the "Fed Add Amount" box and, if appropriate, the amount for the "Non-Fed Amount."
8. Click "Save and Start Workflow."
9. Click "OK" on the warning message alerting you that a Procurement Request is being added to your task box. The user will be returned to the launch page of the new Award File.

Your Tasks

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

34 items found, displaying all items.1

View	Task Id	Award Number	Task Name	Task Status	Applicant Name	Document Type
View	1380605	NA09GOT4990038	Procurement Request and Commitment of Funds	Not Started	Institute for Culturally Managed Resources (ICMR)	Procurement Request and Commitment of Funds
View	1380604	NA09GOT4990038	Review Release of Funds	Not Started	Institute for Culturally Managed Resources (ICMR)	Award File

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

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

The Procurement Request should be completed and sent through the workflow process. The steps to complete the Procurement Request are the same as those used for a new award and will not be repeated here.

11. Click the “View” link for Review Release of Funds.

Award File In Progress - NA09GOT4990038

Id: 2147952
Status: ProgramOfficerActions - Not Started

Action: Forward to Grants Specialist for Review Submit

Your Comments: Please select an action
Edit Special Award Conditions
Forward to FALD for Review
Forward to Grants Specialist for Review
Reassign Award File
View Amendment Details
View FAIS Sheet
View Reporting Frequencies
View/Edit Partial Funding Document
Save Comment

Print Award File History

Attachments:

Pending Actions X

One item found

Type	ID	Start Date	Federal Funding	Fiscal Year	Last Action Status	Last Action Date	Last Action User
Procurement Request and Commitment of Funds	214795304/24/2009			2009	Procurement Request and Commitment of Funds: Not Started		NOAA Student

NOTE: Be certain the Procurement Request has been approved before forwarding the Award File to the Grants Specialist. (The Red "X" should change to a green check mark.)

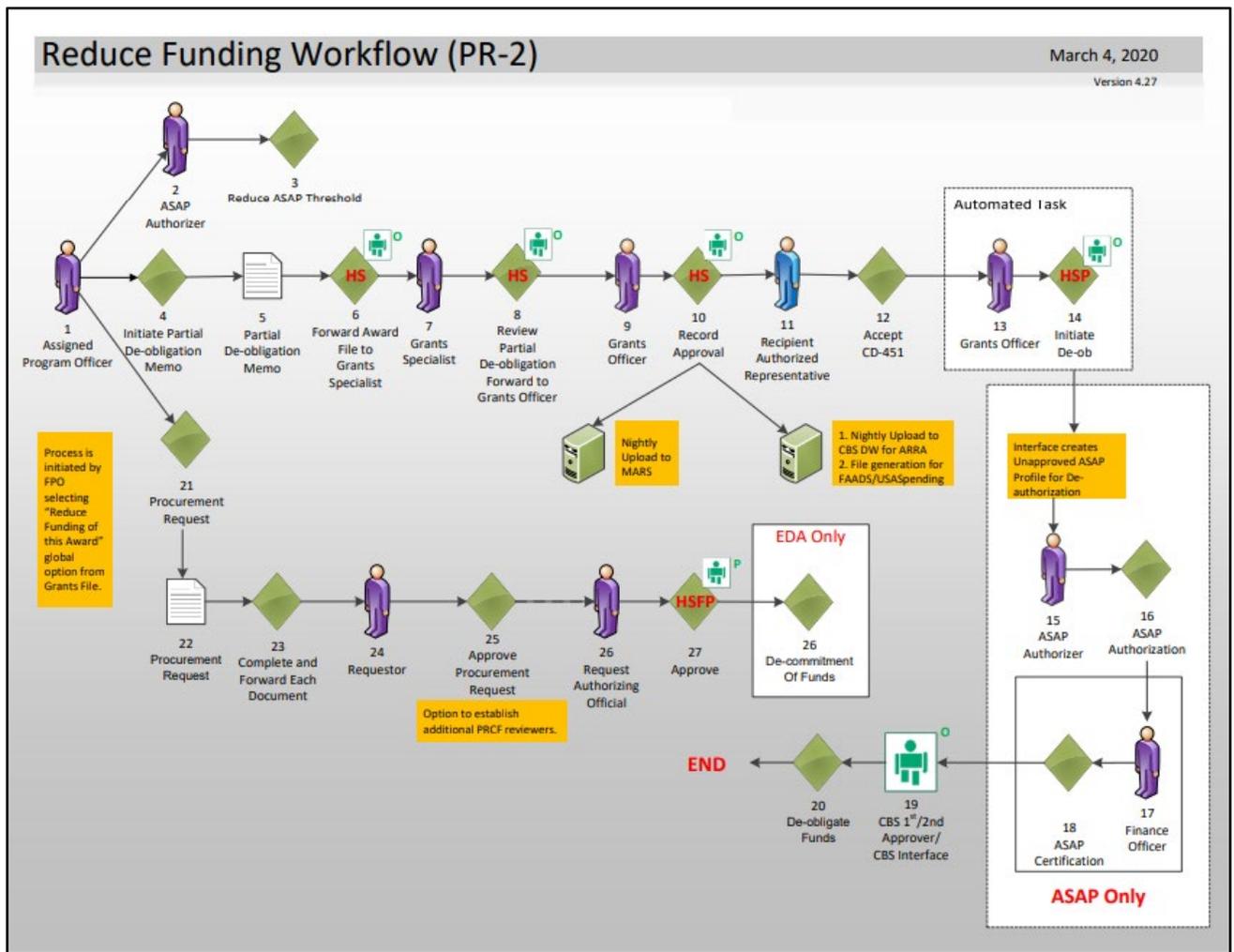
12. Usually, after the Procurement Request has been approved, the user can select “Forward to Grants Specialist for Review” and add a workflow comment. You will have the opportunity to make modifications to the “Amendment Details”; in your role as “Grants Specialist.” If changes to the Partial Funding Memo or Funding Amounts are necessary select “View/Edit Partial Funding Document.”

NOTE: If changes are being made to the Federal Funding Amount, the Procurement Request task must also be in the user’s Inbox. Make certain the same changes are made on both documents (the Procurement Request and Commitment of Funds and the Review Release of Funds).

Sample Language for Partial Funding Memo

- **(STANDARD)** This release of funds of \$ ____ is for year __ of a __ year multi-year award. All required Progress and Financial reports have been submitted and accepted.
- **(EXAMPLE 2)** This release... Due to _____, total funding for this award period is not available; additional funds will be provided at a later date. All required Progress...
- **(EXAMPLE 3)** This release... Due to _____, total funding for this award period is not available in this FY. Additional funds will be provided in FY __. It is our intent to provide total funding for this award. All required Progress...
- **(EXAMPLE 4*)** This release... Due to _____, additional funds will not be provided and this award will be reduced by _____. All required Progress and Financial reports have been submitted and accepted.
- **(EXAMPLE 5)** This release of funds is expected to be the final release of funds in FY __. The remainder of the project is expected to be funded in FY __ through FY __ assuming funds are available. All required Progress...
- **(EXAMPLE 6**)** This release of funds of \$ ____ is for year __ of a __ year multi-year application which was originally funded as Amendment _____. All required Progress...
- **NOTES:**
 - *When no additional funds are to be made available, the Program Office needs to advise the Grants Officer. This allows the Grants Officer to create an amendment informing the recipient that no additional funds will be provided. The recipient has the option of continuing work with existing funds or terminating the award.*
 - ** If Federal Funding is being reduced, the match should be reduced accordingly.*
 - *** If the Partial Funding is on a continuation application, instead of the original award, note the appropriate amendment number in the Partial Funding Memo.*

Reduce Funding



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

A Reduction in Funding Action is initiated from the Grants File page similar to a Partial Funding action.

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

Grants File - NA12GOT9990023

Id: 2245484
Status: Accepted

Action:

Your Comments:

-
-
-
-

Reduce Funding -- NA12GOT9990023

Memo * [Guidance](#)

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

143 / 4000

Approved Plan and Prior Obligations

Action	Application ID	Project Title
<input type="button" value="Select"/>	2245483	For Reduction in Funding Screen Shots

Planned Year	Approved Fed Share	Obligated	Approved Non-Fed Share	Assigned Non-Fed Share
2012	\$10,000.00	\$10,000.00	\$0.00	\$0.00

Selected Application

Application ID	Approved Fed Share	Remaining Fed Share	Pending Fed Share	Fed Deduct Amount	Approved Non-Fed Share	Remaining Non-Fed Share	Pending Non-Fed Share	Non-Fed Amount	AMD No.	Project Title
2245483	\$10,000.00	\$0.00	\$0.00	100.00	\$0.00	\$0.00	\$0.00	0	0	For Reduction in Funding Screen Shots

On the Reduce Funding Memo only the “Fed Deduct Amount” and “Non-Fed Amount” (also a deduction) are available for data entry. The word “Deduct” will be added to the Non-Fed Amount label to avoid confusion. Although positive numbers should be entered into these fields the amounts will be deducted from the award.

0.4 items found, displaying all items.

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

For a Reduction in Funding, two tasks are generated in the FPO Inbox similar to a Partial Funding action.

The Reduction in Funding Procurement Request should be for a negative dollar amount.

Last CBS Validation: Status:

Active Procurement Requests:
Nothing found to display.

Withdrawn Procurement Requests:
Nothing found to display.

Federal Share: * \$

Accounting - ACCS Lines *
One item found.1

Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DWV	Validated	Action
14	2000	2012	10-01-0002-00-00-00-00	52-30-00-000	SAE0000-SAE	41-12-00-00	(\$100.00)	N		Yes	Edit Delete

[Add New ACCS Line](#)

PRCF Total for this Award action: \$-100.00
Total Federal funds authorized for this Award action: \$-100.00

Similar to a Partial Funding, two tasks are generated in the FPO’s Inbox. The Procurement Request must be filled out using negative numbers for the funding reduction. The workflow must be completed by the Authorizing Official (Budget Officer role) to allow the Procurement Request to be forwarded to Grants Management.

THIS DOCUMENT IS LOCKED

MEMORANDUM: NOAA Finance Office
FROM: Grants Management Division
SUBJECT: FINANCIAL CLOSEOUT
De-obligation Request for Award: ED14HDQ3130053

Total Federal Funding (entire award): \$150.00
Recipient Name: BANGOR PUBLISHING COMPANY
EIN: 010024570
DUNS: 001096643
ASAP ID (if applicable):
Award Period: 05/01/2014 - 07/16/2014
Federal Program Officer: Matthew Chasse
Obligation Number: (Available only for Interfaced Awards)
Total De-obligation Amount from CBS: \$150.00
(Available only for Interfaced Awards)

Item #/MDL	ACCS	Amount to De-obligate
0 / 0	Not interfaced. No ACCS lines available.	\$0.00

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

Justification for De-obligation:

The Grants Management Division received the Final SF-425 (attached) and recognizes that it does not reconcile with the Commerce Business System (CBS) due to <REASON GOES HERE>. De-obligations and closeout are authorized for the remaining unobligated balance as reported by CBS.

[Spell Check](#)

Financial Closeout Checklist:

The Grants Management Division recognizes there is a reconciliation issue with this grant in the CBS:

Grants Officer Approval: Lamar Dwayne Revis 07/17/2014
Finance Office Approval: Diana Carpenter 07/17/2014

Attachments:

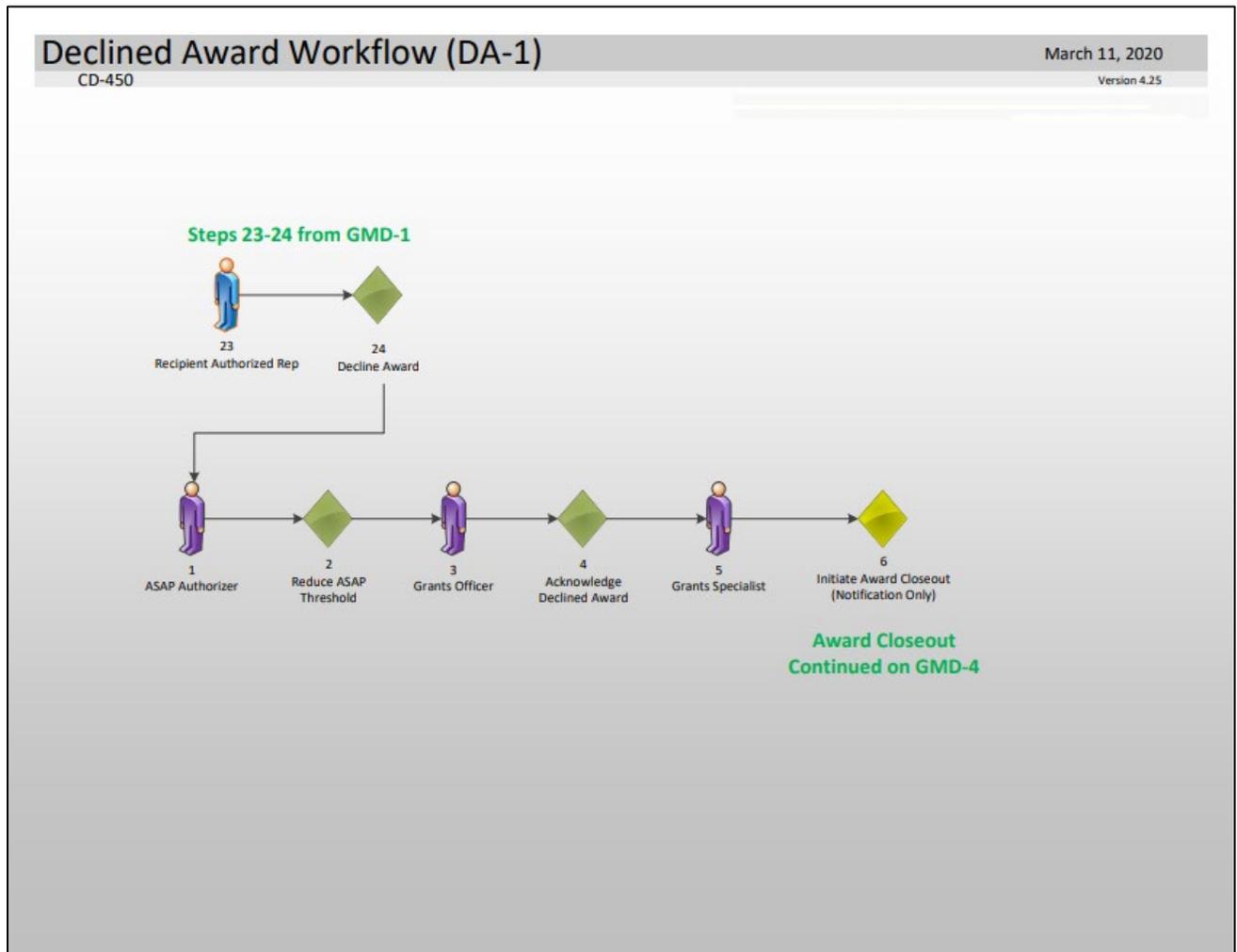
No attachments.

[Cancel](#) [Print Memo](#) [Print Final Financial Report](#)

The Award File for a Reduction in Funding contains a de-obligation memo. This is used to document the de-obligation by the system via the interface. For EDA (which is non-interfaced), the workflow will go through the Finance Office where the de-obligation memo will be manually approved.

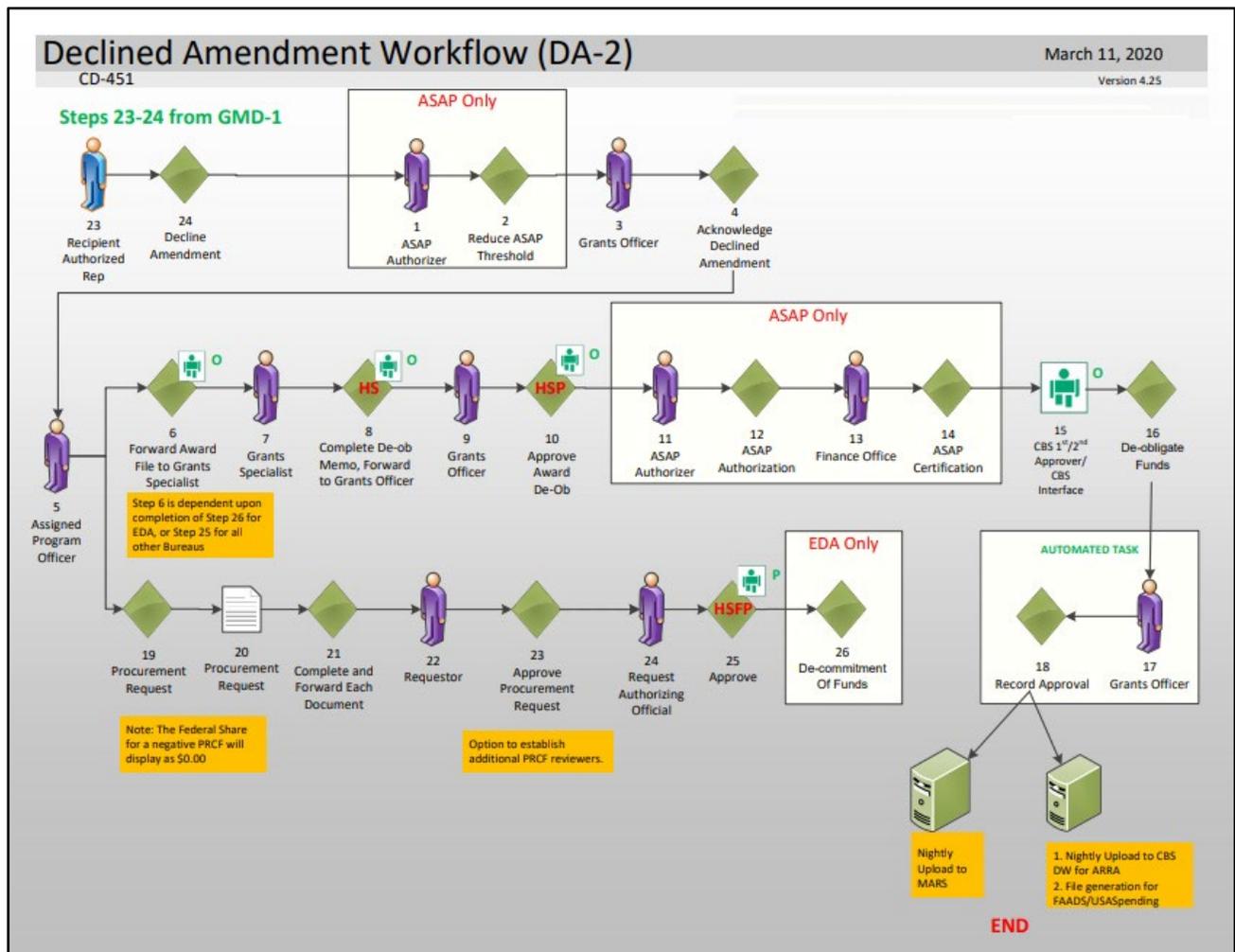
Note: For EDA, the accounting line will not be shown, because EDA's accounting system is not interfaced with Grants Online. The label that says "Total De-Obligation Amount from CBS" has a parenthetical beneath it that indicates this data field is only available for interfaced awards but there is still an amount showing which is actually coming from the final SF-425.

De-Obligate Declined Award



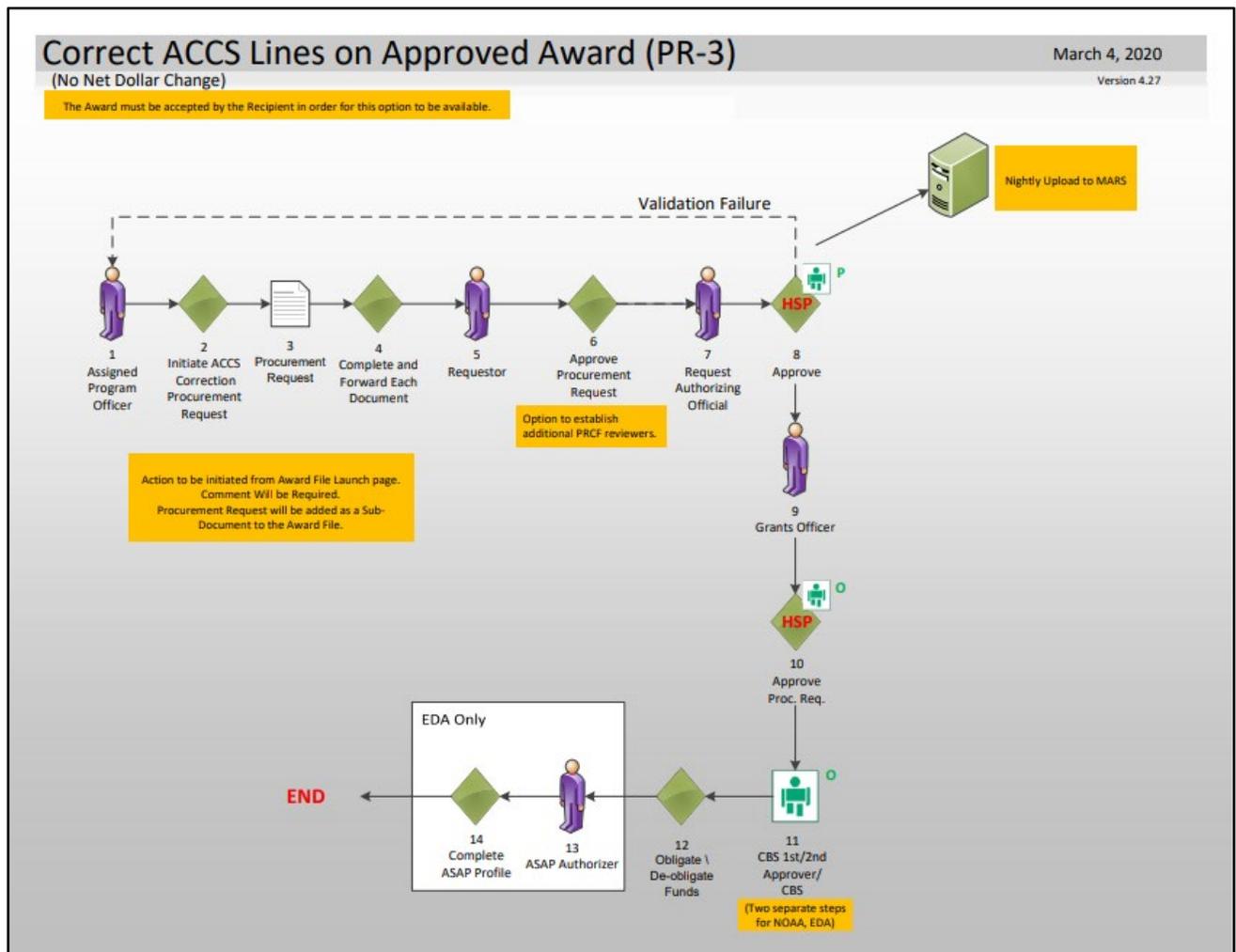
If an award is declined by the recipient, the extraneous CBS Approver task will be automatically closed for interfaced awards. For non-interfaced awards the task should be manually closed by the CBS Approver and then the Help Desk should be notified in order to remove the Closeout date from the Award File. The Award still needs to go through a Financial Closeout process to de-obligate the funds via the interface using the de-obligation memo.

De-Obligate Declined Amendment



The Declined Amendment workflow looks just like a Reduction in Funding except that the De-obligation Memo and De-obligating Procurement Request are generated when the Grants Officer acknowledges the declined award as opposed to the Federal Program Officer initiating an action. The Declined Amendment workflow will not be an “Award File in Progress” but will have the amendment number of the Declined Amendment.

Correct ACCS Lines on Approved Award



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

1. Navigate to the Award File containing the Procurement Request that needs to be corrected.
2. Access the details page of the Procurement Request that needs to be corrected.
3. Click on the “Correct ACCS” button. This will generate a new “zero-dollar” Procurement Request.
4. Edit the ACCS line to make the amount (or portion of the amount) negative.
5. Add one or more positive ACCS lines to make a net balance of zero on the Procurement Request.
6. Start the workflow for approval of the Procurement Request.

NOTE: Only the Assigned Program Officer for the Award can make a correction to an ACCS line on an award that has been approved.

Procurement Request and Commitment of Funds - NA12GOT9990014

THIS DOCUMENT IS LOCKED

THIS REQUEST IS APPROVED

[Correct ACCS Lines](#)

Last CBS Validation: Status:

Accounting - ACCS Lines *

2 items found, displaying all items.1

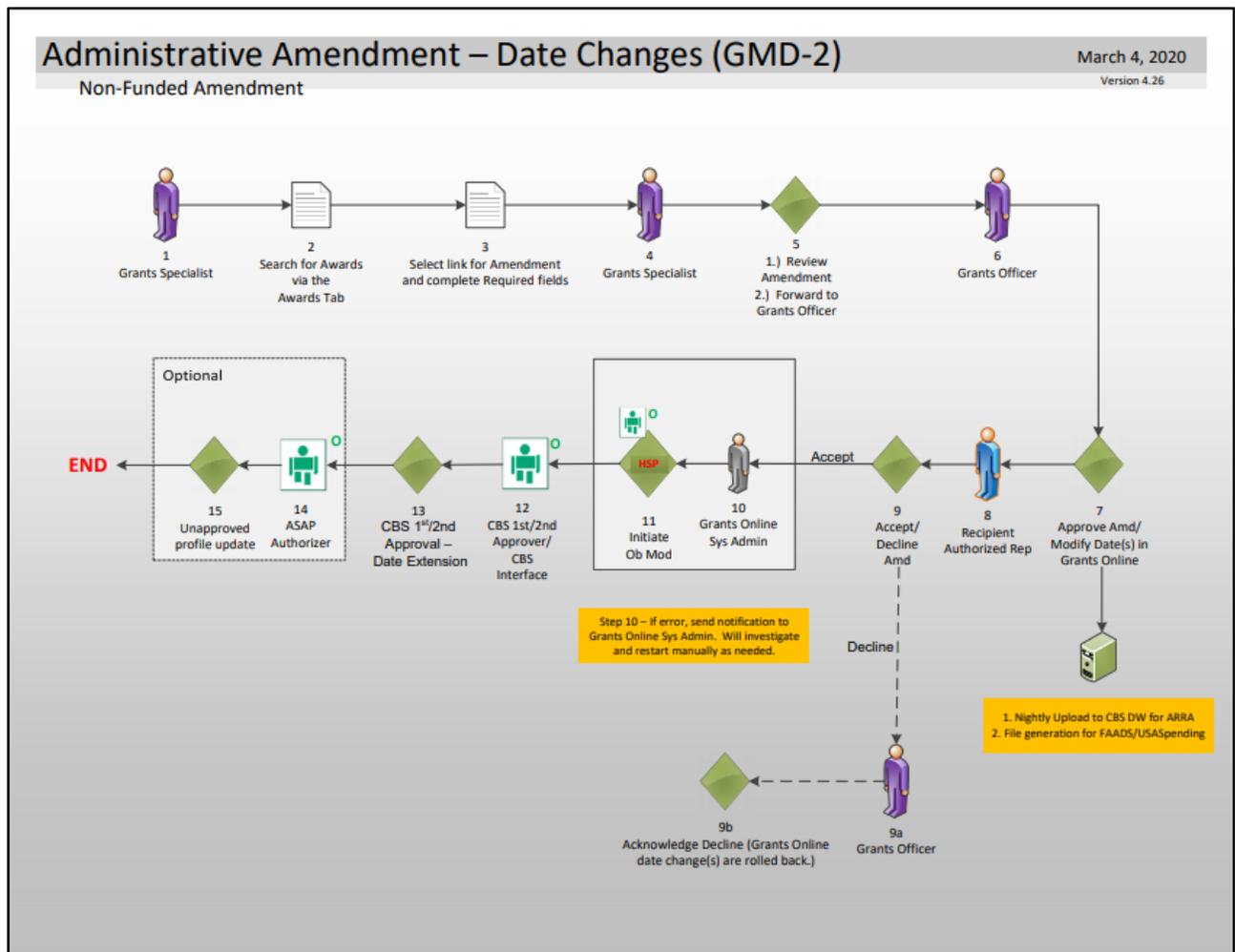
Bureau	Fund	Fiscal Year	Organization	Program	Project - Task	Object Class	Amount	Prior Year	DW	Validated
14	1	2012	06 -02 -0004-01-00-00-00	01-01-02-000	14K3BN8-P00	41-11-00-00	\$10,000.00	N	Yes	
14	2000	2012	10 -01 -0002-00-00-00-00	52-30-00-000	SAE0000-SAE	41-12-00-00	(\$10,000.00)	N	Yes	

[Add New ACCS Line](#)

PRCF Total for this Award action: \$10,000.00

Total Federal funds authorized for this Award action: \$10,000.00

Correct Award Dates (Administrative Amendment)



The EDA Project Officer can initiate administrative amendments to make corrections to Project Start and/or End Dates without requiring the Recipient to submit a No-Cost Extension request.

1. Navigate to the Grants File and Select “Create Administrative Amendment” from the drop-down menu.

2. On the Amendment page, fill in the required fields

Amendment to Financial Assistance Award

CFDA Number:
11.312

Award Number:
ED17HDQ3120040

URI:

Recipient Name:
TRUSTEES OF INDIANA UNIVERSITY

Street Address:
BRYAN HALL 107 S INDIANA AVENUE
BLOOMINGTON, IN 47405-7000

Amendment Start and End Dates: *
[] - []

Project Start and End Dates:
[] - []

Grant Type:
 Grant Cooperative Agreement

Amendment Number:
Pending

DBA Name:
INDIANA UNIVERSITY

Extend Work Completion To:
N/A

The Amendment Start and End Date fields and the Project Start and End Date fields are not part of the official CD-451. The Amendment Start and End Dates are for internal reporting purposes only and cannot be used by themselves to extend the award. The award can only be extended using the Project End date field or by submission of a No-Cost Extension Award Action Request.

- Amendment Start and End Dates (date you are performing this action and the date you are changing the project end date to)
- Project Start and End Dates (current project start date and new project end date)
- Reasons for Amendment: Select "Enter Reasons"

For funded amendments the Federal Share and Recipient Share fields are populated from the Procurement Request(s) associated with. For all other amendments the Recipient Share can be edited until the award is signed by the Grants Officer.

Costs Are Revised As Follows:	Previous Estimated Cost	Add	Deduct	Total Estimated Cost
Federal Share of Cost	\$2666691.00	\$0.00	\$0.00	\$2666691.00
Recipient Share of Cost	\$0.00	\$0.00	\$0.00	\$0.00
Total Estimated Cost	\$2666691.00	\$0.00	\$0.00	\$2666691.00

→ Reason(s) for Amendment: [Enter Reasons](#)

*Include a justification for the change.

3. Save and Start Workflow

Flagging an Organization as “Risk Recipient”

Grants Management - Risk Review	
Risk Recipient	false
Do Not Pay Information	
SAM Information	
Federal Awardee Performance and Integrity Information System (FAPIIS) Information	
Negotiated Indirect Cost Rate Agreements (NICRA) Information	
Other Information	

EDA must contact the Grants Online Help Desk in order to change the High-Risk flag for an organization: it cannot be changed manually through the Organization Details page.

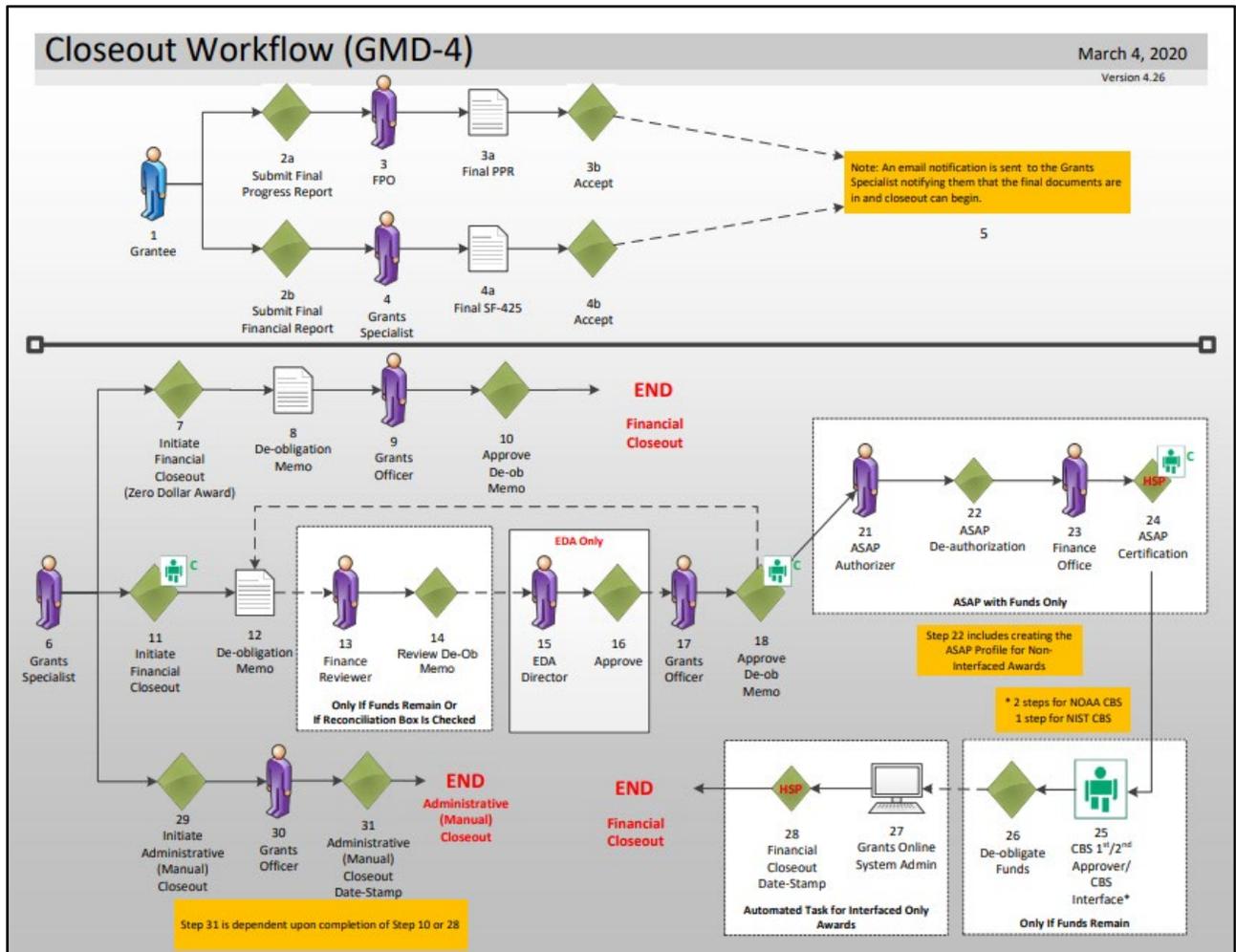
Organization Profile Change Request (ASAP Enrollment Request)

Note – this functionality does not currently work for EDA grantees. Applicants must contact their project officer with requests for changes, who will then work with the Grants Online Helpdesk and NOAA Finance to make sure the updates get made in both Grants Online and CBS.

The EDA process is currently done outside of Grants Online. The EDA steps are as follows:

1. EDA Project Officers initiate the contact with the Recipients to get their enrollment forms and forward that information to NOAA Finance/AOD.
2. AOD works with the Recipient to complete the ASAP enrollment process.
3. After the Recipient has been set up in ASAP and the vendor information has been updated in CBS, AOD will send an email to the Grants Online Help Desk with the vendor no, vendor ids, and ASAP ID so that the Recipient's non-construction awards can be switched to an ASAP organization profile in Grants Online. AOD will cc: the Project Officer on the Help Desk request so EDA will know that the ASAP setup is now complete for that award.
4. For Grants Online awards, EDA will notify the Recipient of their ability to request ASAP payments, but that they will be using the "ASAP Drawdown" Award Action Request in Grants Online (with an attached SF-270) before submitting the request in ASAP (See next slide).

Closeout



For a step by step guide on how to closeout an award, please reference the following manual:

https://www.noaa.gov/sites/default/files/atoms/files/Closeout_Processing.pdf

Grants File - NA15NOS4820044

Id: 2439208

Status: Accepted

Action:

Initiate Financial Closeout ▼

Submit

Your Comments:

Please select an action
Create Administrative Amendment
Create Award Action Request
Create Enforcement
Initiate Financial Closeout
Initiate Manual Closeout - Override GMD Policy
Request Extension to Closeout
Submit Additional Closeout Documents
Submit Satisfied Special Award Conditions
View Accounting Details
View/Manage Award-related Personnel

THIS DOCUMENT IS LOCKED

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FROM: Grants Management Division
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De-obligation Request for Award: ED14HDQ3130053

Total Federal Funding (entire award): \$150.00
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Finance Office Approval: Diana Carpenter 07/17/2014

Attachments:

No attachments.

Cancel **Print Memo** **Print Final Financial Report**