Federal Program Officer, Grants Specialist and Grant Recipient

Reassignments

NOAA Grants Online Program Management Office

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# Table of Contents

Reassignments........................................................................................................................................... 5
Universal – Inbox – Task Management ........................................................................................................... 6
Federal Program Officers ................................................................................................................................... 11
  Reassign Competition for Applications ........................................................................................................ 11
  Reassign Program Officer on Awards or Applications ................................................................................... 14
  Review Minimum Requirements – Reassign Application ............................................................................. 24
  Conduct Negotiations – Reassign Application .......................................................................................... 27
  PO Checklist – Reassign Award File ......................................................................................................... 30
Grants Specialist / Director ......................................................................................................................... 33
Appendix – Reassignment of Task Notification ......................................................................................... 37
Reassignments

Grants Online is a workflow driven application, where tasks are assigned to the appropriate role/user. At times, task(s) may need to be reassigned. Some common reasons are as follows:

- An Uncertified FPO completes a document, but is not authorized to start the workflow. In this example, the Uncertified FPO would need to reassign the task to a Certified FPO.
- An individual is leaving his/her position, and therefore reassigns his/her tasks.

Grants Online provides a notification when a task has been reassigned. The notification will note the former task owner, the current task owner and who reassigned the task.

This manual will focus on how to reassign a task for two principle user roles, the Federal Program Officer (FPO), and Grants Specialist / Director role.

When looking to reassign a task, keep in mind the following two criteria:

- The user can only select a person with a role that has oversight of his/her role
- The user can only select a person within the same Program Office / Line Office
Universal – Inbox – Task Management

Most Grants Online users have access to the Inbox tab as well as the Task Management feature which allows the user to reassign tasks between users. This will only reassign the owner for the selected task. This process will not reassign any subsequent tasks for the selected application / award.

The following steps explain how to reassign a task between users in the same organization. In addition to being affiliated with the same organization, the user to whom the task is being assigned must have the same Grants Online role.

1. Click the **Inbox** tab.

2. Click the **Task Management** link. The Task Management page is displayed.

3. While on the Task Management page, choose the appropriate role from the Search Criteria dropdown list. The selection defaults to the user’s main role.

4. Select the appropriate Organization from the second dropdown menu. If the user is affiliated with multiple organizations, they must choose the right organization for the task to be reassigned.

5. Click the **Search** button.
6. When search results display, click the **Reassign** link next to the task that is to be reassigned.

![Task Management Image]

Note that all available tasks are displayed using this search method. Other methods that can be used to refine the search are:

a. Add the Last Name of User to the search criteria.
b. Add the Award Number to the search criteria.

![Task Management](image1)

- Award Number: NA19GOT9980001
- Last Name of User:
- Task ID:
- Organization: One Commerce Program Office (OCPO)

3 Items found, displaying all items 1

<table>
<thead>
<tr>
<th>Reassignment</th>
<th>Award Number</th>
<th>Task ID</th>
<th>Owner</th>
<th>Project Title</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA19GOT9980001</td>
<td>5686673</td>
<td></td>
<td>Grants Student00</td>
<td>GSTUDENT00 - Competitive Application for Nov18 Webinar FPO Training</td>
<td>NEPA Document</td>
</tr>
<tr>
<td>NA19GOT9980001</td>
<td>5686672</td>
<td></td>
<td>Grants Student00</td>
<td>GSTUDENT00 - Competitive Application for Nov18 Webinar FPO Training</td>
<td>NEPA Document</td>
</tr>
<tr>
<td>NA19GOT9980001</td>
<td>5686671</td>
<td></td>
<td>Grants Student00</td>
<td>GSTUDENT00 - Competitive Application for Nov18 Webinar FPO Training</td>
<td>NEPA Document</td>
</tr>
</tbody>
</table>


c. Add the Task ID to the search criteria.

![Task Management](image2)

- Task ID: 5686672
- Last Name of User:
- Organization: One Commerce Program Office (OCPO)

One Item found.

<table>
<thead>
<tr>
<th>Reassignment</th>
<th>Award Number</th>
<th>Task ID</th>
<th>Owner</th>
<th>Project Title</th>
<th>Name</th>
</tr>
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<td>NA19GOT9980001</td>
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<td>Grants Student00</td>
<td>GSTUDENT00 - Competitive Application for Nov18 Webinar FPO Training</td>
<td>NEPA Document</td>
</tr>
</tbody>
</table>
7. The result of clicking the Reassign button is the Search Users screen. Click the **Search** button. The user may also specify the last name of the user to whom the task should be reassigned. If the search is conducted using a common last name, also specify the first name; that limits the number of records returned by the search.

8. Click the **Select** link next to the name of the user to whom the task should be reassigned.
9. The final step in the process is to confirm the reassignment. This page recaps the details of the task to be reassigned. Click the **Yes** button to confirm the request or the **No** button to cancel the request.
Federal Program Officers

Federal Program Officers (FPO’s) have the option to reassign a task, an application or an award at various steps within the application and award processes as outlined in this manual.

Reassign Competition for Applications

This feature in Grants Online allows an application to be reassigned from one competition to another competition within the same RFA. An application cannot be reassigned to a different RFA. Additionally, only applications for which the Minimum Requirements Checklist has not been started or is currently in progress can be reassigned. Applications that have passed minimum requirements cannot be reassigned.

1. Click on the Application tab and then click the Reassign Competition for Applications link. The Reassign Competition for Applications page is displayed.

2. Enter the search criteria and click the Search button. In this example, we are searching by Competition Title.
3. When the search results are displayed, click the **Select** link next to the appropriate application.

4. The next step is to identify the correct Competition that the application should be reassigned under. To do this, select the radio button next to the appropriate Competition name and click the **Reassign** button at the bottom of the screen.
5. The top of the screen now displays the following message: “Application successfully reassigned to <<New Competition Name>>.” The next optional step is to identify the new Program Officer to be responsible for processing the application from this point onward. Select the radio button next to the appropriate FPO and click the Submit button.

![Reassign Competition for Applications]

Application successfully reassigned to Reassignments RFA - COMP 2 competition.

Reassign Competition for Applications
Although not required, it is strongly recommended that you select a new Program Officer to perform minimum requirements check on the reassigned application. For your convenience, the list of program officers on the routing list is displayed below. Please select the Program Officer, who will be responsible for processing this application from this point onward.

The Program Officer Grants Student10 is currently assigned to the selected application. One item found.

<table>
<thead>
<tr>
<th>Program Officer</th>
<th>Name</th>
<th>Affiliation</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Grants One Commerce Program Office (OCPO)</td>
<td>301-555-1212</td>
</tr>
</tbody>
</table>

[Submit] [Cancel]
Reassign Program Officer on Awards or Applications

The Reassign Program Officer on Awards or Applications feature will permanently reassign the award or application, so that any subsequent tasks will be assigned to the new individual. This feature can be used to reassign the Program Officer and/or the Program Office. The following three scenarios will be covered in this section:

- Scenario 1 – Reassign to a new Program Officer
- Scenario 2 – Reassign to a new Program Office
- Scenario 3 – Reassign to a new Program Office and a new Program Officer

Scenario 1 – Reassign to a new Program Officer; Program Office stays the same

1. Click on the Application tab and then click the Reassign Program Officer on Awards or Applications link. The Reassign Program Officer on Awards/Applications page is displayed.

Please note: Be sure to select the correct Document Type in order for the search to display the desired result(s).
2. In this example, we are searching by RFA Name and Application. Enter the appropriate search criteria and click the **Search** button.

![Reassign Program Officer on Awards/Applications](image1)

3. When the search results are displayed, select the checkbox next to the appropriate application and click the **Search the User to Reassign** button.

![Reassign Program Officer on Awards/Applications](image2)
4. The Search Users page is displayed. In this scenario, choose the same Line Office (i.e., Grants Online Training) and Program Office (i.e., One Commerce Program Office) from the dropdown menu and enter the First and/or Last Name if desired. Click the **Search** button.

5. When the search results are displayed, select the radio button next to the appropriate individual’s name and click the **Submit** button at the bottom of the screen.
6. The final step in the process is to confirm the reassignment. This page recaps the award/application details, as well as the selected new owner. To proceed with this request, click the Reassign button, otherwise click the Cancel button.
Scenario 2 – Reassign to a new Program Office; Program Officer stays the same

1. Click on the Application tab and then click the Reassign Program Officer on Awards or Applications link. The Reassign Program Officer on Awards/Applications page is displayed.

2. In this example, we are searching by RFA Name, and Application. Enter the appropriate search criteria and click the Search button.
3. When the search results are displayed, select the checkbox next to the appropriate application and click the **Search the User to Reassign** button.

4. The Search Users page is displayed. In this scenario, the original Line Office is Grants Online Training and the original Program Office is One Commerce Program Office. Choose a different Line Office and Program Office from the dropdown menu. To further refine the search, the user may also enter the First and/or Last Name. Click the **Search** button.
5. When the search results are displayed, select the radio button next to the same individual, in this case Grants Student 10, and click the Submit button at the bottom of the screen.
Scenario 3 – Reassign to a new Program Office and a new Program Officer

1. Click on the Application tab and then click the Reassign Program Officer on Awards or Applications link. The Reassign Program Officer on Awards/Applications page is displayed.

2. In this example, we are searching by RFA Name, and Application. Enter the appropriate search criteria and click the Search button.
3. When the search results are displayed, select the checkbox next to the appropriate application and click the **Search the User to Reassign** button.

4. The Search Users page is displayed. In this scenario, the original Line Office is Grants Online Training and the original Program Office is One Commerce Program Office. Choose a different Line Office and Program Office from the dropdown menu. To further refine the search, the user may also enter the First and/or Last Name. Click the **Search** button.
5. When the search results are displayed, select the radio button next to a different individual, in this case someone other than Grants Student 10, and click the Submit button at the bottom of the screen.
Review Minimum Requirements – Reassign Application

After an application is submitted via Grants.gov or an application is manually input in Grants Online, the Review Minimum Requirements Checklist task is available.

The workload routing section of the RFA identifies who will receive the original task assignment. At this step in the process, the application can be reassigned to a different Federal Program Officer. Any subsequent tasks will be assigned to the new individual.

1. Click the **Inbox** tab.

2. Click the **Tasks** link to display the items currently available to the Program Officer.

3. Click the View link beside the **Review Min. Req. Checklist** task.
4. The Application launch page is visible. From the action dropdown menu, choose **Reassign Application**. Click the **Submit** button.

![Application Details](image1.png)

5. The Reassign Application screen is displayed.

![Reassign Application Screen](image2.png)
6. Choose the correct individual from the dropdown menu and click the **Reassign** button.

![Reassign Application](image)  

**Reassign Application**  
Available Program Officers: Student09, Grants  
Reassign  
Cancel

7. This update has been completed. The Inbox is displayed, and the Review Min. Req. Checklist task is no longer on the Your Tasks list.
Conduct Negotiations – Reassign Application

After the Minimum Requirements Checklist has been completed on an application, the next step in the process is to Conduct Negotiations.

The workload routing section of the RFA identifies who will receive the original task assignment. At this step in the process, the application can be reassigned to a different Federal Program Officer. Any subsequent tasks will be assigned to the new individual.

1. Click the **Inbox** tab.

2. Click the **Tasks** link to display the items currently available to the Program Officer.

3. Click the View link beside the **Conduct Negotiations** task.

4. The Application launch page is displayed. Prior to completing the Conduct Negotiations task, the FPO has the option to reassign this application to another user. Choose the **Reassign** option from the dropdown menu and click the **Submit** button.
Note that even after the Conduct Negotiations task has been started, the Reassign option is available. Choose **Reassign** from the dropdown menu and click the **Submit** button.

5. The Reassign Application screen is displayed.
6. Choose the correct individual and click the **Reassign** button.

![Reassign Application](image)

7. This update has been completed. The Inbox is displayed, and the Conduct Negotiations task is no longer on the Your Tasks list.
PO Checklist – Reassign Award File

During Award Processing, the Assigned FPO has three tasks to complete: the PO Checklist, NEPA and Procurement Request. The PO Checklist provides the ability to reassign the award file so that any subsequent tasks will be assigned to the new individual.

1. Click the **Inbox** tab.
2. Click the **Tasks** link to display the items currently available to the Program Officer.
3. Click the View link beside the **Complete PO Checklist** task.
4. The PO Checklist launch page is displayed. The FPO has the option to reassign the award file to another user. Choose the **Reassign Award File** option from the dropdown menu and click the **Submit** button.

5. The Reassign PO Checklist screen is displayed.
6. Choose the correct individual and click the Reassign button.

7. This update has been completed. The Inbox is displayed, and all tasks related to the award file which was reassigned are no longer on the Your Tasks list.
Grants Specialist / Director

At any time during the workflow, the Grants Officer (or the EDA Director) may reassign the Grants Specialist and/or Director on an Award.

1. Click the Applications tab.

2. Click the Reassign Grants Specialist or Director on Award link. The Reassign Grants Specialist or Director on Awards page is displayed.
3. Enter the search criteria, including the user type, and click the **Search** button. In this example, we are searching by Grants Specialist within the Grants Online Training-NOAA Line Office.

Note that all available tasks are displayed using this search method.

- To refine the search results, add the Award Number to the search criteria.
4. Choose the appropriate Award by clicking the **Select** check box and click the **Search the User to Reassign** button.

5. The Search Users page is displayed. Enter any applicable search criteria, if desired, and click the **Search** button.

6. The search results are displayed. Choose the appropriate Grants Specialist by clicking on the **Select** radio button next to the correct individual and click the **Submit** button.
7. The final step in the process is to confirm the reassignment. This page recaps the award details as well as the selected new Grants Specialist. To proceed with this request, click the **Reassign** button, otherwise click the Cancel button.
Appendix – Reassignment of Task Notification

Notification of a reassignment of task will be available under Your Notifications. Click the View Notification link next to the Reassignment of Task subject line to view the notification.

The notification details screen will be displayed with details of the reassignment and of the task.