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### Version History

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

<table>
<thead>
<tr>
<th>Release Date</th>
<th>Changes Made</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 2015</td>
<td>First edition of this Manual</td>
</tr>
<tr>
<td>December 2015</td>
<td>Typos and formatting errors fixed. Training agenda updated. Chapters on Task and File Reassignment Created. Chapter on “Forward/Revise Award File” Created</td>
</tr>
<tr>
<td>October 2019</td>
<td>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.</td>
</tr>
<tr>
<td>May 2020</td>
<td>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</td>
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</table>
# Training Agenda

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

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

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

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 am</td>
<td>GMD Checklist</td>
<td>60 min</td>
</tr>
<tr>
<td>9:00 am</td>
<td>Specific Award Conditions</td>
<td>30 min</td>
</tr>
<tr>
<td>10:00 am</td>
<td>CD-450</td>
<td>30 min</td>
</tr>
<tr>
<td>10:30 am</td>
<td>Morning Break</td>
<td>15 min</td>
</tr>
<tr>
<td>10:45 am</td>
<td>Merit Review Module - Managing a Review Event</td>
<td>60 min</td>
</tr>
<tr>
<td>11:45 am</td>
<td>Lunch Break</td>
<td>60 min</td>
</tr>
<tr>
<td>12:45 pm</td>
<td>Merit Review Module - Reviewing an Application</td>
<td>30 min</td>
</tr>
<tr>
<td>1:15 pm</td>
<td>Selection Package*</td>
<td>60 min</td>
</tr>
<tr>
<td>2:15 pm</td>
<td>View Report: Application Report*</td>
<td>15 min</td>
</tr>
<tr>
<td>2:30 pm</td>
<td>Review of Application Processing Maps*</td>
<td>15 min</td>
</tr>
<tr>
<td>2:45 pm</td>
<td>Afternoon Break</td>
<td>15 min</td>
</tr>
<tr>
<td>3:00 pm</td>
<td>Recipient Award Acceptance</td>
<td>30 min</td>
</tr>
<tr>
<td>3:30 pm</td>
<td>View Report: Award Tracking Report*</td>
<td>15 min</td>
</tr>
<tr>
<td>3:45 pm</td>
<td>Questions</td>
<td>30 min</td>
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</table>
### Day 3 – Post Award Processing

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 am</td>
<td>Award Action Request: Satisfied Specific Award Conditions</td>
<td>(45 min)</td>
</tr>
<tr>
<td>9:15 am</td>
<td>Award Action Request: No-Cost Extension</td>
<td>(60 min)</td>
</tr>
<tr>
<td>10:15 am</td>
<td>ASAP Drawdown Request</td>
<td>(30 min)</td>
</tr>
<tr>
<td>10:45 am</td>
<td><em>Morning Break</em></td>
<td>(15 min)</td>
</tr>
<tr>
<td>11:00 am</td>
<td>Partial Funding</td>
<td>(60 min)</td>
</tr>
<tr>
<td>12:00 am</td>
<td><em>Lunch Break</em></td>
<td>(60 min)</td>
</tr>
<tr>
<td>1:00 pm</td>
<td>Financial and Progress Reports</td>
<td>(60 min)</td>
</tr>
<tr>
<td>2:00 pm</td>
<td>Questions</td>
<td>(30 min)</td>
</tr>
<tr>
<td>2:30 pm</td>
<td>Discussion of Reporting Needs</td>
<td>(15 min)</td>
</tr>
<tr>
<td>2:45 pm</td>
<td><em>Afternoon Break</em></td>
<td>(15 min)</td>
</tr>
<tr>
<td>3:00 pm</td>
<td>Meet with RO Leadership on Assignment of Roles and Any Other Issues/Concerns*</td>
<td>(60 min)</td>
</tr>
</tbody>
</table>
Grants Online Overview
# Grants Online Acronym List

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

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

For the Grants Online Glossary, please reference:

## Grants Life Cycle

<table>
<thead>
<tr>
<th>Pre-Award</th>
<th>Award</th>
<th>Post-Award</th>
<th>Close-Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create/Review RFA/NOFO in Grants Online, Post NOFO/Application at Grants.gov</td>
<td>Recommend Applicant for Award</td>
<td>Submit Progress Reports</td>
<td>Initiate Close-Out</td>
</tr>
<tr>
<td>Notify Applicants (Non-Comp only)</td>
<td>Approve Selection Package (Competitive only)</td>
<td>Submit Financial Reports</td>
<td>Submit Final Documents</td>
</tr>
<tr>
<td>Submit Applications via Grants.gov</td>
<td>Modify/Withdraw Application</td>
<td>Manage User Accounts, Update Org Info</td>
<td>Approve Final Documents</td>
</tr>
<tr>
<td>Review Application Package (Minimum Requirements)</td>
<td>Obligate Funds</td>
<td>Impose/Remove Specific Award Conditions</td>
<td>Close Grant</td>
</tr>
<tr>
<td>Review, Evaluate Applications</td>
<td>Award Grant</td>
<td>Initiate Award Action Requests</td>
<td>Amend/Suspend/Reactivate/Transfer/Terminate Award</td>
</tr>
</tbody>
</table>

### KEY

<table>
<thead>
<tr>
<th>Federal User Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grantee and Federal User Functionality</td>
</tr>
<tr>
<td>Reviewer Functionality</td>
</tr>
</tbody>
</table>
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](http://www.corporateservices.noaa.gov/grantsonline/pdfs/IE%20Compatibility%20View%20Fix.pdf)

Grants Online and Grants.gov

[Diagram showing flow between Grants Online, Grants.gov, General Public, Applicant, Recipient, DOC, MBDA, NTIA, SBA]
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

Pre-Award Processing

- RFA
  - NOFO
  - Competitions
  - Merit Reviews
  - Applications

Post Award Processing

- Grants File
  - Progress Reports
  - Financial Reports
  - Award Action Requests
  - Correspondence

- Award File
- • PO Checklist
- • GMD Checklist
- • CD-450/451
- • Special Award Conditions
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.

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.

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 Logo](image)

### Your Tasks

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Open</td>
</tr>
</tbody>
</table>

- Items found, displaying all items: 1

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Task Type</th>
<th>Document Type</th>
<th>Document</th>
<th>Start Date</th>
<th>Completed Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task 1</td>
<td>Type 1</td>
<td>Type A</td>
<td>File 1</td>
<td>2023-01-01</td>
<td>2023-02-01</td>
</tr>
</tbody>
</table>

Welcome to Clean Cuton: Benedetti Graham. You are logged in to PROD.3p.
Buttons vs. Column Headings

- **Buttons**

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

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

- **Column Headings**

  - **Workflow History**
    - **Name**
      - ASAP Authorization-Extension to Close Out
      - Review Award Action Request
      - Review Award Action Request
    - **Date Assigned**
      - 01/24/2020 12:19:54 PM
      - 02/23/2020 02:34:25 PM
      - 01/23/2020 02:33:32 PM
    - **Date Started**
      - 01/27/2020 08:19:35 AM
      - 01/24/2020 12:19:53 PM
      - 01/23/2020 02:34:24 PM
    - **Date Completed**
      - 01/27/2020 08:22:22 AM
      - 01/24/2020 12:19:53 PM
      - 01/23/2020 02:34:24 PM

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

  - **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**
      - **Task Received Date**
      - **Task Name**
      - **Task Status**
      - **Document Type**

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

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

- **Save | Save and Return to Main | Cancel**
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**

<table>
<thead>
<tr>
<th>Bernadette Grafton</th>
<th>202-482-2917</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ryan Smith</td>
<td>202-482-1464</td>
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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)

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## Grants Online User Roles - Definitions

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<tr>
<th>User Role</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Authorized Account Approver (AAA)</td>
<td>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.</td>
</tr>
<tr>
<td>ASAP Authorizer</td>
<td>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 &quot;Finance Office&quot;. The ASAP Authorizer is also responsible for releasing ASAP profiles as appropriate and reducing ASAP thresholds in the case of a reduction in funding.</td>
</tr>
<tr>
<td>Budget Officer (Request Authorizing Official)</td>
<td>The &quot;Budget Officer&quot; 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.</td>
</tr>
<tr>
<td>CAMS First Approver</td>
<td>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.</td>
</tr>
<tr>
<td>CAMS Second Approver</td>
<td>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.</td>
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<td>CAMS First Approver - D</td>
<td>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.</td>
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<td>CAMS Second Approver - D</td>
<td>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.</td>
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<tr>
<td>CESU Manager (NOAA Only)</td>
<td>This role provides oversight for CESU (Cooperative Ecosystem Studies Units) Awards.</td>
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<tr>
<td>Closeout Notification Receiver</td>
<td>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.</td>
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<tr>
<td>Commit1</td>
<td>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.</td>
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<tr>
<td>Commit2</td>
<td>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.</td>
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<tr>
<td>Director (EDA Only)</td>
<td>This role is unique to EDA and is given to the user who has Director-level approval authority on award actions and payments.</td>
</tr>
<tr>
<td>FALD</td>
<td>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.</td>
</tr>
<tr>
<td>Federal Program Officer - Certified</td>
<td>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 &quot;Certify&quot; 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.</td>
</tr>
<tr>
<td>User Role</td>
<td>Definition</td>
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<tr>
<td><strong>Federal Program Officer - Uncertified</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Finance Office</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Finance Reviewer</strong></td>
<td>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 &quot;Reconciliation&quot; checkbox on the deobligation memo.</td>
</tr>
<tr>
<td><strong>GMAC (Grants Management Advisory Committee)</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Grants Officer</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Grants Specialist</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Lead Budget Officer</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>NEPA Official</strong></td>
<td>The NEPA Official reviews and approves the NEPA documentation, a part of the Award File, prior to submission to Grants Management.</td>
</tr>
<tr>
<td><strong>NEPA Reviewer</strong></td>
<td>The NEPA Reviewer provides an additional review of the NEPA documentation as part of an Award File prior to submission to Grants Management.</td>
</tr>
<tr>
<td><strong>OIG -- Clearance</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>OIG -- Oversight</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>OLA</strong></td>
<td>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.</td>
</tr>
<tr>
<td>User Role</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>OLIA</td>
<td>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.</td>
</tr>
<tr>
<td>Primary Office Contact</td>
<td>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.</td>
</tr>
<tr>
<td>Program Office Reviewer</td>
<td>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.</td>
</tr>
<tr>
<td>Program Office Staff</td>
<td>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.</td>
</tr>
<tr>
<td>Progress Report Reviewer</td>
<td>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.</td>
</tr>
<tr>
<td>Public Affairs Liaison</td>
<td>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.</td>
</tr>
<tr>
<td>Recipient Administrator</td>
<td>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.</td>
</tr>
<tr>
<td>Recipient Authorized Representative</td>
<td>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.)</td>
</tr>
<tr>
<td>Recipient Business/Finance Representative</td>
<td>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.</td>
</tr>
<tr>
<td>Recipient Business/Finance Representative -- Submitting</td>
<td>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.</td>
</tr>
<tr>
<td>User Role</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Recipient Investigator</strong>&lt;br&gt;(Principal Investigator/Project Director)</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Recipient Investigator -- Submitting</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Recipient User</strong>&lt;br&gt;(Recipient Key Personnel)</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Requestor</strong>&lt;br&gt;(Program Office Requestor)</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Reviewer</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>RFA Publisher</strong></td>
<td>This role is given to users who are responsible for posting grant opportunity notices at Grants.gov.</td>
</tr>
<tr>
<td><strong>Selecting Official</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Vendor Control</strong></td>
<td>This role is given to Finance Officer users who create and update vendors in CBS to be associated with Grants Online Organizations on an &quot;interfaced&quot; award. Obligations for &quot;interfaced&quot; awards are created and modified via web services between Grants Online and CBS. For &quot;non-interfaced&quot; awards the obligations are created and updated manually. Vendor Control users do not get workflow in Grants Online for &quot;non-interfaced&quot; awards.</td>
</tr>
<tr>
<td><strong>Vendor Validator</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>View Agency</strong></td>
<td>This role is available for Federal staff (at the Agency/Bureau level) who need view-only access to grants files.</td>
</tr>
<tr>
<td><strong>View Line Office</strong></td>
<td>This role is available for Federal staff (at the Line Office Level) who need view-only access to grants files.</td>
</tr>
<tr>
<td><strong>View Program Office</strong></td>
<td>This role is available for Federal staff (at the Program Office Level) who need view-only access to grants files.</td>
</tr>
</tbody>
</table>
| Certified Program Officer or  
<table>
<thead>
<tr>
<th>Uncertified Program Officer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Uncertified Federal Program Officers</strong> and <strong>Program Office Staff</strong> have identical Grants Online roles.</td>
</tr>
</tbody>
</table>

**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](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.

**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.

![Image of pop-up menu]

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.

![Image of breadcrumb trail]

**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.

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.
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.

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

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.

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.
7. 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.

8. To update his/her affiliations, click the **Details** link under the Affiliations header.

9. When the screen shown below displays, click the **Edit** link.
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](image1)

**NOTE:** If a user wishes to change his/her Organization, s/he must contact his/her bureaus’ 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](image2)

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

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

1. The user can modify his/her notifications using the checkboxes in the Email Inbox column (under the Notification Preferences section – top potion 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.

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.
**Change the Password**

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

   ![User Preferences Screen](image)

   - **Page Size**: 100
   - **Number of Bread Crops**: 20
   - **Look and Feel**: DOC
   - **Workflow Warning**: Yes

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 Screen](image)

   *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.

[Image of Account Management tab with My Delegations link highlighted]

2. The Delegate Authority screen is visible.

[Image of Delegate Authority screen showing search fields for First Name, Last Name, Organization, and Role]

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.

[Image of Delegate Authority screen with search fields populated and Find Peers button highlighted]
3. When the search results are returned, choose the user you would like to assign as a delegate. Click the Delegate button.

![Delegate Authority](image1)

4. 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](image2)

**Rescind a Delegation**

1. From the Account Management Tab, click the My Delegations link.
2. 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.

3. Click the Rescind link next to the name of the individual(s) you would like to remove as a delegate.

---

**Log In As a Delegate**

1. The user should log in to Grants Online with his/her normal user name.

2. Click the OK button on the Notice to Users page.

3. 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).
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.

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
Searching for an RFA

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

**Award Number Algorithm:**

**BBYYLLCCCNNNN** (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:**

<table>
<thead>
<tr>
<th>City</th>
<th>Identifier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlanta</td>
<td>ATL</td>
</tr>
<tr>
<td>Austin</td>
<td>AUS</td>
</tr>
<tr>
<td>Chicago</td>
<td>CHI</td>
</tr>
<tr>
<td>Denver</td>
<td>DEN</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>PHI</td>
</tr>
<tr>
<td>Seattle</td>
<td>SEA</td>
</tr>
<tr>
<td>Headquarters</td>
<td>HDQ</td>
</tr>
</tbody>
</table>
Processing a Non-Competitive Application

(EDD Example)
We will use the sample application in the training package for data entry.
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.
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.

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

1a. Grants.gov

Input Paper Applications for RFA

1b. NOAA

Applications submitted via Grants.gov

GRANTS.GOV

2. RFA

3. Assigned Program Officer

4. Review Minimum Requirements Checklist (1 Per Application)

5. Approve/Reject Minimum Requirements Checklist (1 Per Application)

END

<table>
<thead>
<tr>
<th>View</th>
<th>Task Id</th>
<th>Task Name</th>
<th>Task Status</th>
<th>Award Number</th>
<th>Document Id</th>
<th>Document Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>5694490</td>
<td>Notify Recipients</td>
<td>In Progress N/A</td>
<td>2714322</td>
<td>RFA</td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>5694491</td>
<td>Review Min. Req. Checklist</td>
<td>Not Started N/A</td>
<td>2714351</td>
<td>Application</td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Minimum Requirement</th>
<th>Met Requirement ?</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received on Time:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does the application received before the date and time?</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Correct Federal Funding:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Does the application request the correct federal funding amount?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Correct Match:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Does the application contain the correct non-federal funding amount?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Complete Application:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Does the application contain all of the required forms?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Data Management Plan:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Was a Data Management Plan included with the proposal if required by the NOFO?</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

Overall Comments:

Add comments here if necessary.

Save | Save and Return to Main | Cancel

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

**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**
Prepare Applications for Funding Overview (UNI-3)

Once the PO Checklist has been completed and certified (Steps 4 and 5), the system will generate the "Forward Award File to" task for sending the award file to the Grants Specialist. Step 33 is dependent upon completion of Steps 19 and 20 (or 25 for EDA).

Step 30 can be done without completion of Steps 17 (or 21 for EDA) in special cases.

Applications can be rejected if the user selects the option to "Reject/Close" at step 3 or step 31.

Automated Task

Grants Online System Admin
Link Vendor with Org Profile
Scenario 1: DUNS Number is found in Grants Online

Step 1:
If the DUNS Number was entered on the application and the organization is found in Grants Online, a message in black bold text will be displayed that reads “This Applicant has been automatically assigned a Grants Online Organization based on unique DUNS Number match.” 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): [ ]
- Other (specify): [ ]
- Is this application being submitted to 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: 10/30/2019
- Federal Agency Received Date: 10/30/2019
- Applicant Identifier: [ ]
- State Application Identifier: [ ]
- Federal Identifier: [ ]

**Applicant Information**

- Legal Name: Bangor Publishing Company
- Department Name: [ ]
- Division Name: [ ]
- Duns Number: [ ] (9 or 12 digit number)
- EIN Number: [ ]
- Street: [ ]
- City: [ ]
- State: Tennessee [ ]
- County: [ ]
- Address State: [ ]
- 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.

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

c) If the desired organization is found, click the **Select** link to associate the organization in Grants Online. Proceed to Step 2.
Scenario 3: DUNS Number was not found in Grants Online

Step 1:

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

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

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

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

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

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).
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.

**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

**Step 4:** Authorized Representative Lookup – Find Auth Rep in database

**Step 5:** Generate New Award Number or Associate with Existing Award
Conduct Negotiations Complete

No Procurement Request for Zero Dollar Awards

Your Tasks

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Open</td>
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<table>
<thead>
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<th>Task Name</th>
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<th>Document Type</th>
<th>Project Title</th>
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<th>Document Title</th>
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<th>Task Title</th>
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</thead>
<tbody>
<tr>
<td>Procurement Request</td>
<td>Not Started</td>
<td>NEPA</td>
<td>Test/Training App 1 for Not Released</td>
<td>Not Started</td>
<td>NEPA Document 1</td>
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<td>NEPA Document 1</td>
<td>Not Started</td>
<td>NEPA</td>
<td>NEPA</td>
<td>NEPA</td>
</tr>
<tr>
<td>Complete PO Checklist</td>
<td>Not Started</td>
<td>NEPA</td>
<td>Test/Training App 1 for Not Released</td>
<td>Not Started</td>
<td>NEPA Document 1</td>
<td>Not Started</td>
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</tr>
<tr>
<td>Assign Award Number/Recipient</td>
<td>Not Started</td>
<td>NEPA</td>
<td>Test/Training App 1 for Not Released</td>
<td>Not Started</td>
<td>NEPA Document 1</td>
<td>Not Started</td>
<td>NEPA</td>
<td>NEPA</td>
<td>NEPA</td>
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Pending Actions

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<th>Task Status</th>
<th>Task Title</th>
<th>Task Title</th>
<th>Task Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO Checklist</td>
<td>2/18/2022</td>
<td>Not Started</td>
<td>NEPA Document 1</td>
<td>Not Started</td>
<td>NEPA</td>
<td>NEPA</td>
<td>NEPA</td>
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<tr>
<td>NEPA</td>
<td>2/18/2022</td>
<td>Not Started</td>
<td>NEPA Document 1</td>
<td>Not Started</td>
<td>NEPA</td>
<td>NEPA</td>
<td>NEPA</td>
</tr>
<tr>
<td>Completed Request and Commitment Letter</td>
<td>2/18/2022</td>
<td>Not Started</td>
<td>NEPA Document 1</td>
<td>Not Started</td>
<td>NEPA</td>
<td>NEPA</td>
<td>NEPA</td>
</tr>
</tbody>
</table>

Organization Profile: 2/18/2022: $0.00: 2022: Validate Organization Profiles: Not Started

Organization Profile: 2/18/2022: $0.00: 2022: Validate Organization Profiles: Not Started
In the Universal application process, the Provisional Organization workflow is initiated at the same time as the PO Checklist, NEPA, and Procurement Request when the FPO 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:

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.

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.)
- 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?

- [ ] YES
- [ ] NO

Special Conditions

Categorical Exclusions

- 6.03a.3 Management plan amendments.
- 6.03a.3b 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 is consistent with the NTIA’s Rustic Place Guidelines for a Trail.
- 6.03a.3c Minor technical additions, corrections, or changes to a management plan.
- 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, activities, or the cumulative have significant impacts on the human environment (e.g., actions with federal (40 CFR §500.4).

Please Select a NEPA Official for routing purposes:

- Select A NEPA Official

Save | Save and Return to Main | Cancel
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

11 Procurement Request
12 Procurement Request
13 Complete and Forward Each Document
14 Requestor
15 Approve Procurement Request
16 Request Authorizing Official
17 Approve

The ACCS is valid
- Validated: true
- Bureau (xx): 20
- Fund (xx): 40
- Fiscal Year (yyyy): 2020
- Project - Task: E000025
- Program Code: 30-11-00-000
- Organization: 99-00-0000-0000-00-00-00
- Object Class: 41-11-00-00
- Amount: $2,000.00
- Prior Year Fund: No

Federal Share: 4,000.00
Requisition Number: E5000000000000

Affected Reference Number: NA.gov/Inc: 330106

To:
TEST ORG INC
125 Germantown Road Germantown, MD 20076

Accounting - ACCS Lines
- One item found:

<table>
<thead>
<tr>
<th>Bureau</th>
<th>Fund</th>
<th>Fiscal Year</th>
<th>Organization</th>
<th>Program</th>
<th>Project - Task</th>
<th>Object Class</th>
<th>Amount</th>
<th>Prior Year</th>
<th>DWValidated</th>
<th>Action</th>
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<tr>
<td>20</td>
<td>40</td>
<td>2020</td>
<td>99-00-0000-0000-0000-0000-0000-0000</td>
<td>30-11-00-000</td>
<td>E000025-000</td>
<td>41-11-00-00</td>
<td>$2,000.00</td>
<td>N</td>
<td>Yes</td>
<td>Edit Delete</td>
</tr>
</tbody>
</table>

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:**

![Validated ACCS Line](image)
- 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

2
PO Checklist

3
PO Checklist

4
Complete PO Checklist

5
Certify PO Checklist

5a
Award File

30
Forward Award File to Grants Specialist

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 ATOMIC CS State: CA

Applicant’s EIN and DUNS numbers have been verified.

Grant Type

- Grant
- Cooperative Agreement

If Cooperative Agreement, enter Cooperative Agreement Specific Award Condition

Statutory Authority

Project Description/Abstract

- Guidance

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 Barmark)
- Institutional (designated by Grants Office)
- Formula/Allotment
- Congressionally Mandated (Hard Barmark)

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

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) Stand

Conflict of Interest/Pot Employment Restrictions

- Guidance

Is there a former DOE employee working for the applicant who represented or will represent the agency involved in the merit review and/or selection process?
- NO
- YES

If YES, please attach files below.
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.

Eligibility Determination Based On (choose one):

Date/Event of Eligibility Determination:

For the Project (Pressing Need/Coordination):
Colorado's industry clusters are comprised of a diverse set of innovative sectors, including aerospace, aviation, medical technology, energy and outdoor recreation.
ACE 13 will help Colorado urban and rural areas in collaboration to find new opportunities to foster international partnerships.
ACE 13 will provide Colorado the opportunity to participate in innovations in mobility, sustainability, and emerging technologies.

Need for the Project (Pressing Need/Economic):

Maximum Grant Rate Eligibility (%):
50%

This project benefits an area which is primarily:
Regional/Multi-Jurisdictional.

Anticipated Economic Benefit

Anticipated Economic Benefits:
By the end of the ACE, participants will see how host communities in urban and rural areas of the Denver Region will receive new partnership opportunities to strengthen local innovation and entrepreneurial ecosystems. Showcases the importance of building local partnerships and providing incentives to create comprehensive regional economic development strategies that leverage local assets and present best practices and lessons learned by regional clusters. A coordinated regional business plan to stimulate capital investment and job creation. Research to understand and develop new tools to achieve environmentally sound economic development.

Estimated Jobs Created:
N/A

Estimated Jobs Saved:
N/A

Estimated Private Investment Leveraged:
N/A

Source of Grants Estimates (check as many as apply):
- Letters from Beneficiaries of the Project
- Input/Output Model (CAPEX, BPEX, BEP)
- Comparison to Similar Projects
- Other Method (specify):

Project Beneficiaries:
No beneficiaries have been selected.

Additional Project Information

Special Initiative Code/Initiative Description

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<tr>
<th>No.</th>
<th>Initiative Code</th>
<th>Initiative Description</th>
<th>Active Update Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Regional Capacity (Collaborative RSP, Innovation)</td>
<td>Yes, 09/26/2019</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>Supports growing/emerging clusters (Collaborative RSP, Innovation)</td>
<td>Yes, 09/26/2019</td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>Federal Partners Participating (Public/Private Partnerships)</td>
<td>Yes, 09/26/2019</td>
<td></td>
</tr>
<tr>
<td>04</td>
<td>State Partners Participating (Public/Private Partnerships)</td>
<td>Yes, 09/26/2019</td>
<td></td>
</tr>
<tr>
<td>05</td>
<td>Local Partners Participating (Public/Private Partnerships)</td>
<td>Yes, 09/26/2019</td>
<td></td>
</tr>
<tr>
<td>06</td>
<td>Foundations Participating (Public/Private Partnerships)</td>
<td>Yes, 09/26/2019</td>
<td></td>
</tr>
<tr>
<td>07</td>
<td>NAICS Code that best describes the EDA project (<a href="http://www.census.gov/geo/www/naics/index.html">http://www.census.gov/geo/www/naics/index.html</a>)</td>
<td>R32120</td>
<td></td>
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</tbody>
</table>

Details:

Are reimbursable being used as EDA funds?

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

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.
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.

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:


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).
The General Information section elaborates on the following points:

- **Process Overview**: 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.

- **Funds Removal**: 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.

- **Record Indication**: 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 accidently associated with the application instead of the ASAP record for that organization.

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

### CD-450

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.

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.

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)
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”.

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

- 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)
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.
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 Manager a “Manage Review Event” task goes to the Review Event Manager.
Selection Package

Competitive Process (COMP-3)
Select Applications for Funding Overview

March 4, 2020
Version 4.28

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:

- 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.
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.
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.
Award Action Requests

General Award Action Request Workflow

Award Action Request Workflow (AAR-1)

流程图展示了从第一阶段到第二阶段的各个步骤，包括搜索和访问奖励事项，选择奖励事项，然后向授权的代表发送请求，并进行评估和审批。流程图中还包含了与奖励相关的各个角色和职责。

备注：如果AAR变为修正案，则流程图将与原始流程图相同，但已批准的文件将被视为修正案。

备注：LDA的每日政策允许授权的项目官员将修正案直接发送给LD的直接负责人。

末尾：在修正案提交后，必须由受赠人授权代表签署并生效。
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:

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

ASAP Drawdown Request (AAR-5)  
Agency Review ASAP Recipients Only (Non-NOAA Bureaus)  
March 4, 2020

1. Business Finance Representative, Authorized Representative
2. Search Awards
3. Click on "Create ASAP Drawdown Request" from the grants file options and go to details page to fill out form
   Upload附件 as a PDF file
4. Forward To Authorized Representative
5. Recipient Authorized Representative
6. Forward to Agency
7a. Assigned Grants Specialist
7b. Assign ASAP Drawdown Request
8. Approve
9. Recipient Authorized Representative
10. Drawdown Approval Notification
11. Submit Request in the ASAP system
12. ASAP Authorizer
13. Release Funds in ASAP
14. Recipient Authorized Representative
15. Confirmation of Release of Funds Notification

EDA Only
7a. Forward to Optional Reviewer
7b. EDA Director/Grant Officer
7c. Approve

Step 13 is dependent upon completion of Step 11

* 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 Expenditures
  - Preaward - 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 33% Reduction by Project Director or PI
* Inclusion of Costs Requiring Prior Approval in Cost Principles
* Subaward, Transfer or Contractor Work Under the Award if Not Described in the Approved Application
* Rebudget - Prior Approval Waived (Research Terms and Conditions)
* Termination by Consent

ASAP Drawdown Request
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.)
Performance Progress Reports

Routing of Performance Progress Report (PPR-1)

March 4, 2020

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

Progress Reports created by "Submitting" PI.

1. Principal Investigator (PI) or Authorized Representative
2. Search Awards or Search Reports
3. Click on ID of appropriate report and go to details page to fill out form
4. Principal Investigator /Co-PI Review
5. Review Progress Report
6. Forward to Authorized Representative
7. Recipient Authorized Rep
8. Review Progress Report
9. Forward to Agency
10. Assigned Program Officer
11. Review Progress Report
12. Send for Optional Review
13. Optional Reviewer
14. Review Progress Report
15. Add Comments and Return to Program Officer
16. Assigned Program Officer
17. Approve Progress Report
18. Return for Revisions

END
**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 Table]

Grantees must submit an award action request for Satisfied Specific Award conditions in order to document that a Specific Award Condition has been fulfilled.
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.
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).
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.
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.
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:
- Please select an action
- Submit

### Your Comments:
- Please select an action
- Reduce Reduction in Funds Award
- View Accounting Details
- View/Manage Award-related Personnel

### Reduce Funding -- NA12GOT9990023

**Memo**: Guidance

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

### Approved Plan and Prior Obligations

<table>
<thead>
<tr>
<th>Action</th>
<th>Application ID</th>
<th>Project Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>2245483</td>
<td>For Reduction in Funding Screen Shots</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Planned Year</th>
<th>Approved Fed Share</th>
<th>Obligated</th>
<th>Approved Non-Fed Share</th>
<th>Assigned Non-Fed Share</th>
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</thead>
<tbody>
<tr>
<td>2012</td>
<td>$10,000.00</td>
<td>$10,000.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
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</table>

### Selected Application

<table>
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<tr>
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<tbody>
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<td>2245483</td>
<td>$10,000.00</td>
<td>$0.00</td>
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<td>$100.00</td>
<td>$0.00</td>
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<td>$0.00</td>
<td>$0.00</td>
<td>0</td>
<td>For Reduction in Funding Screen Shots</td>
</tr>
</tbody>
</table>
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.

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

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

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.
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.
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.
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.
### Accounting - ACCS Lines *

2 items found, displaying all items.

<table>
<thead>
<tr>
<th>Bureau/Fund/Fiscal Year/Organization</th>
<th>Program</th>
<th>Project - Task/Object Class/Amount</th>
<th>Prior Year/DVValidated</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 2012</td>
<td>06-02-0004-01-00-00-00 01-01-02-0001</td>
<td>41-10-00-00 $10,000.00</td>
<td>N Yes</td>
</tr>
<tr>
<td>14 2002 2012</td>
<td>10-01-0002-00-00-00 02-30-00-0000</td>
<td>41-12-00-00 ($10,000.00)</td>
<td>N Yes</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>CFDA Number:</th>
<th>11.312</th>
<th>Grant Type:</th>
<th>Cooperative Agreement</th>
</tr>
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<tbody>
<tr>
<td>Award Number:</td>
<td>ED17HDQ3120040</td>
<td>Amendment Number:</td>
<td>Pending</td>
</tr>
<tr>
<td>URI:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recipient Name:</td>
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<td>DBA Name</td>
<td>INDIANA UNIVERSITY</td>
</tr>
<tr>
<td>Street Address:</td>
<td>BRYAN MALL 107 S INDIANA AVENUE BLOOMINGTON, IN 47405-7900</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Amendment Start and End Dates:

- **Amendment Start Date**: [ ]
- **Amendment End Date**: [ ]

*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 Start date field or by submission of a No-Cost Extension Award Action Request.*

| Project Start and End Dates: | [ ] |

3. Save and Start Workflow

### 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 this award. For all other amendments the Recipient Share can be edited until the award is signed by the Grants Officer.*

<table>
<thead>
<tr>
<th>Costs Are Revised As follows:</th>
<th>Previous Estimated Cost</th>
<th>Add</th>
<th>Deduct</th>
<th>Total Estimated Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Share of Cost</td>
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<tr>
<td>Recipient Share of Cost</td>
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<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Total Estimated Cost</td>
<td>$2666691.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$2666691.00</td>
</tr>
</tbody>
</table>

**Reason(s) for Amendment:** [Enter Reasons]

*Include a justification for the change.*
Flagging an Organization as “Risk Recipient”

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

Grants File - NA15NOS4820044

Id: 2439208  
Status: Accepted

Action: Initiate Financial Closeout
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

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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 Periods: 05/01/2014 - 07/16/2014
Federal Program Officers: Matthew Chase
Obligation Numbers (Available only for Interfaced Awards):  
Total De-obligation Amount from CBS: $150.00
(Not interfaced, no ACCS lines available, $0.00)

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

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

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

Attachments:  
No attachments.