Federal Program Officer Training Manual

Universal Application Processing

Prepared by NOAA and BearingPoint, Inc.

Version 2.17*

December 10, 2007

* Version numbers now correspond with Grants Online Release number which can be found at the bottom of the home page.

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Document Conventions

Overview

Welcome to the Grants Online Training Manual. This manual is set up to provide you with step-by-step information to accomplish tasks within Grants Online. The manual is logically sequenced based on the National Oceanic and Atmospheric Administration's (NOAA) Grants lifecycle process and is written to address your role within Grants Online.

Using this Guide

Use the following writing conventions as a guide in using the manual. The manual uses block label text in order to scan for the information desired.

Text Conventions

Text; Example	**What it means.**
Text in Bold; Click **Done**	Indicates a command.
Text in Italics; *FFO Details* screen appears.	Indicates a screen.
Text in Bold Italics; ***Name***	Indicates data to be entered into a field.
Text in All Caps; LOGIN	Indicates a field name.

Notes and Warnings

Notes and Warnings are used to indicate information or advisories when using Grants Online.

Note: A note is used to inform you about additional information during the procedure or process.

Warning! Business process may not work as desired or a procedure may produce an undesirable effect.

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Grants Online Overview

Overview

The National Oceanic and Atmospheric Administration (NOAA) offer a variety of competitive and Universal grants or Awards to various communities including states, universities, and non-profit organizations. Prior to the advent of Grants Online, the processing of grants was a paper-based task involving time-consuming human interactions and program polices to process the grants and to ensure the awarding of the grant is given to the most qualified applicant for a competitive Award, and for qualified designated applicants of Universal Awards.

As part of NOAA's strategy to move scientifically and operationally into the 21st century, Grants Online was developed. Grants Online is an E-Government initiative to create an automated tool that will support the grant evaluation, Award management, and operations process. Grants Online significantly streamlines and unifies grants processing throughout all of NOAA, allowing the Agency to increase efficiencies related to its mission goals.

Grants Online is designed to answer several issues that occur during the Award process including:

- Reducing or eliminating paper forms for application.
- Providing an interface with Grants.gov to ensure applicants can apply for grants electronically.
- Reducing the processing time by incorporating workflows between Federal Program Officers (FPO), Grants Management Division (GMD), Financial Assistance Legal Division (FALD), and Grantees.
- Serving the NOAA community in its efforts to meet mission goals more effectively.

Audience

This manual is developed for Federal Program Officers (FPO). This guide provides the user with step by step instructions for completing the following:

- Input Paper Applications
- Minimum Requirements
- Conduct Negotiation
- PO Checklist
- NEPA Document
- Procurement Request and Commitment of Funds (CD-435)

This guide does not teach policy or business procedures for Federal Program Officers.

Grants Online Software Description

About Grants Online

Grants Online operates in a web environment. As such, you will be required to use an Internet browser to log in and use Grants Online. No software is required for installation. As Grants Online is web-based, you may access the system anywhere at anytime provided that you have Internet access. Login IDs and passwords are required and will be relayed to you once you are established within the system.

Note: You must have an Internet connection in order to access Grants Online.

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Getting Started

Overview When you use any Windows-based software, navigation and ease of use are key components. Grants Online incorporates an intuitive Graphic User Interface (GUI) that assists end users with navigation and appropriate system use. In this module, you will be shown the basics of Grants Online, including the look and feel of the system, navigation, and user customizations.

Module Objectives The Getting Started module will review the following objectives:

- Obtaining your password
- Logging into Grants Online

Overview Grants Online is accessible through your web browser, specifically Internet Explorer.

Accessing Grants Online

1. Click on the Internet Explorer icon on your desktop to open Internet Explorer.

2. Enter the following URL information in the address bar of your browser: https://grantsonline.rdc.noaa.gov, then press **ENTER**

- *Grants Online Login* page appears

Logging into Grants Online

1. If you haven't already, contact the Grants Online Help Desk to obtain your Username and Password.

- Phone: 301-713-1000 or toll free at 1-877-662-2478
- Email: grantsonline.helpdesk@noaa.gov

2. Enter your assigned ***Username.***

3. Enter your assigned ***Password.***

4. Click **Enter.**

Warning! If you enter your username or password incorrectly you will see a nn error message in red on the screen. After three unsuccessful attempts to log in, the system will lock you out and you will have to contact the Grants Online Help Desk to unlock your account.

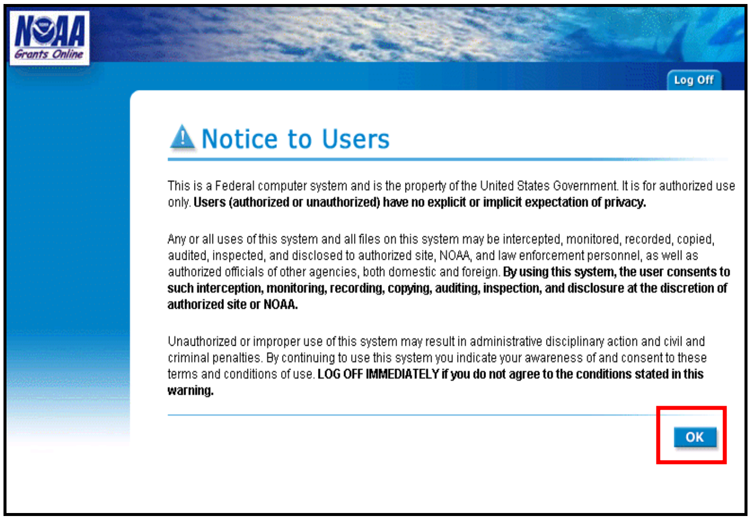
If nothing happens when you click enter, it means the server is down and will need to be restarted.

Note: If you click on the **Grants Online Training** link you can view and download training material including training manuals, quick reference guides, and online webinars.

Logging in to Grants Online

5. The *Notice to Users* screen appears.

6. Review disclaimer information and click **OK.**



Universal Application Overview

Overview

In this manual, you will learn how to input a paper application into the Grants Online system, as well as how to process the application.

Manual Objectives

The Competitive Application Processing manual will review the following objectives:

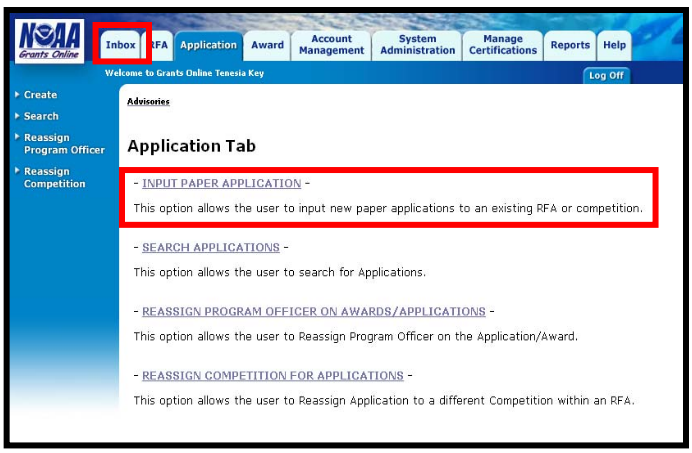
- Input a Paper Application
- Perform the Minimum Requirements Check
- Conduct Negotiations
- Complete the PO Checklist, NEPA Document, and Procurement Request and Commitment of Funds
- Forward Award File to GMD

Processing an Application

If an applicant sends in a paper application to NOAA as opposed to submitting through Grants.gov, the FPO will need to input that application into the Grants Online system. The steps provided during this section will demonstrate how you can accomplish this action. During this time you should also be working on scanning this application into electronic PDF files that you will later upload to the system.

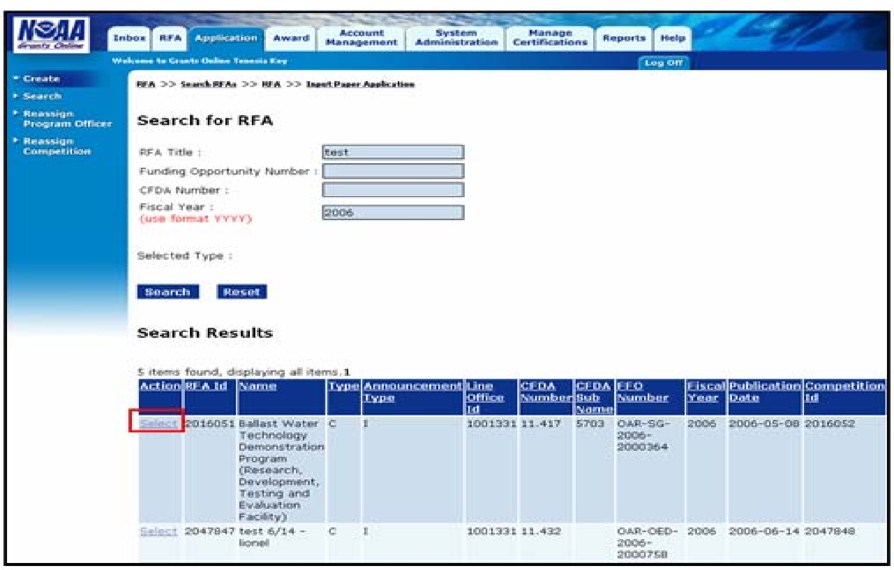
Inputting a Paper Application

1. Select the **Application** tab.
2. Select the **Input Paper Application** link.



3. The *Search for RFA* screen displays. The system wants you to identify the RFA that this application belongs to.
4. Type query information into at least one of the searchable fields.
5. Select the **Search** button.

6. Your search results will display.
7. Click the **Select** link next to the RFA you wish to associate the application with.

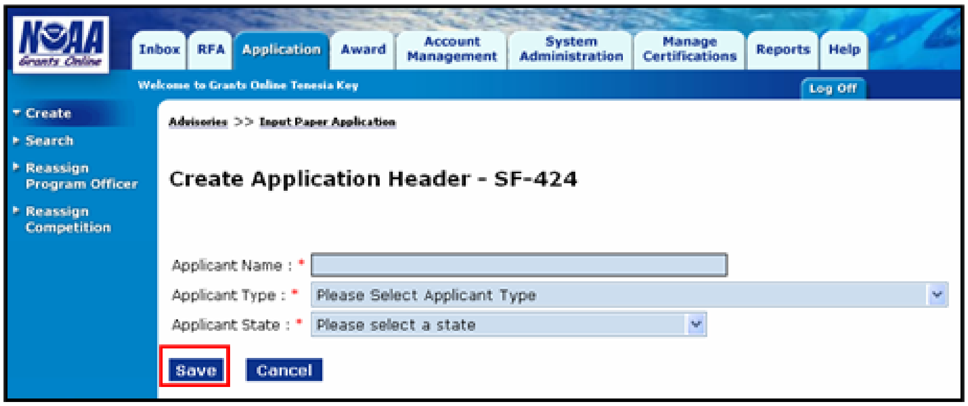


Note: If your search yielded no response, this can mean that your RFA is not listed as published. You can only input paper applications to a published RFA.

8. The *Create Application Header* page appears. Use the information from the SF424 to populate the following mandatory fields:

- Applicant Name
- Applicant Type
- Applicant State

9. Select the **Save** button.

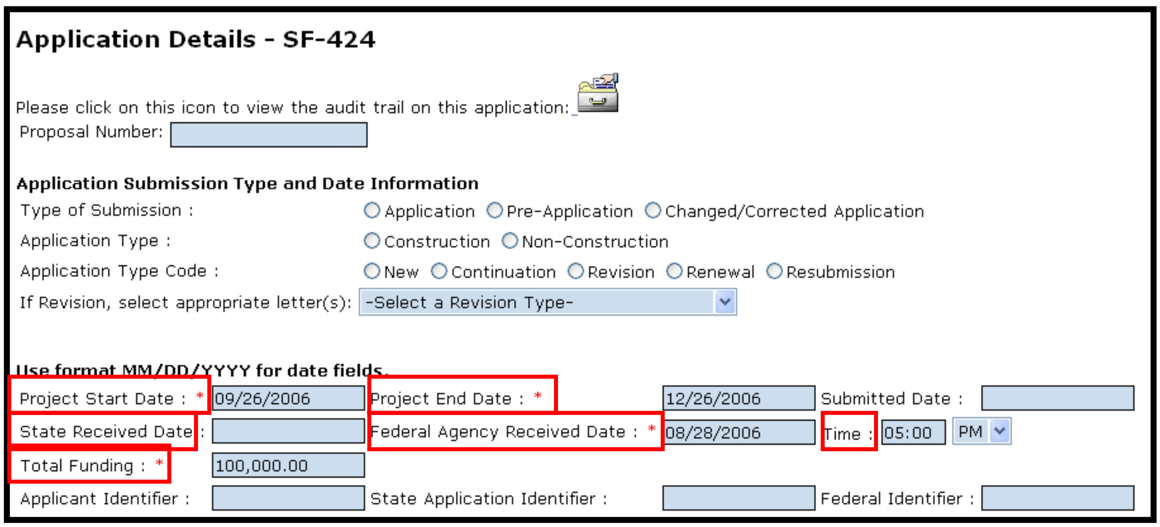


Note: All required fields in Grants Online are indicated by a red asterisk * next to the field name.

Note: Once you click **Save**, the basis for an application is created. You can continue to enter the information or you can complete it at a later time. If you choose to complete it at another time, you must first save the application as a draft and follow the following steps: Go to the RFA tab, search and select the RFA, scroll down the page and click on the Application hyperlink under *Associated Documents*, and then click on the Go to Application Details Page hyperlink to continue working on the application.

10. The *Application Details pa*ge appears. Use the information on the SF424 to enter information into the mandatory fields, highlighted by red asterisk, as well as any other information that you would like to include. Remember that you will be uploading the scanned copies of this application to the system. (The picture below is only the top half of the screen).

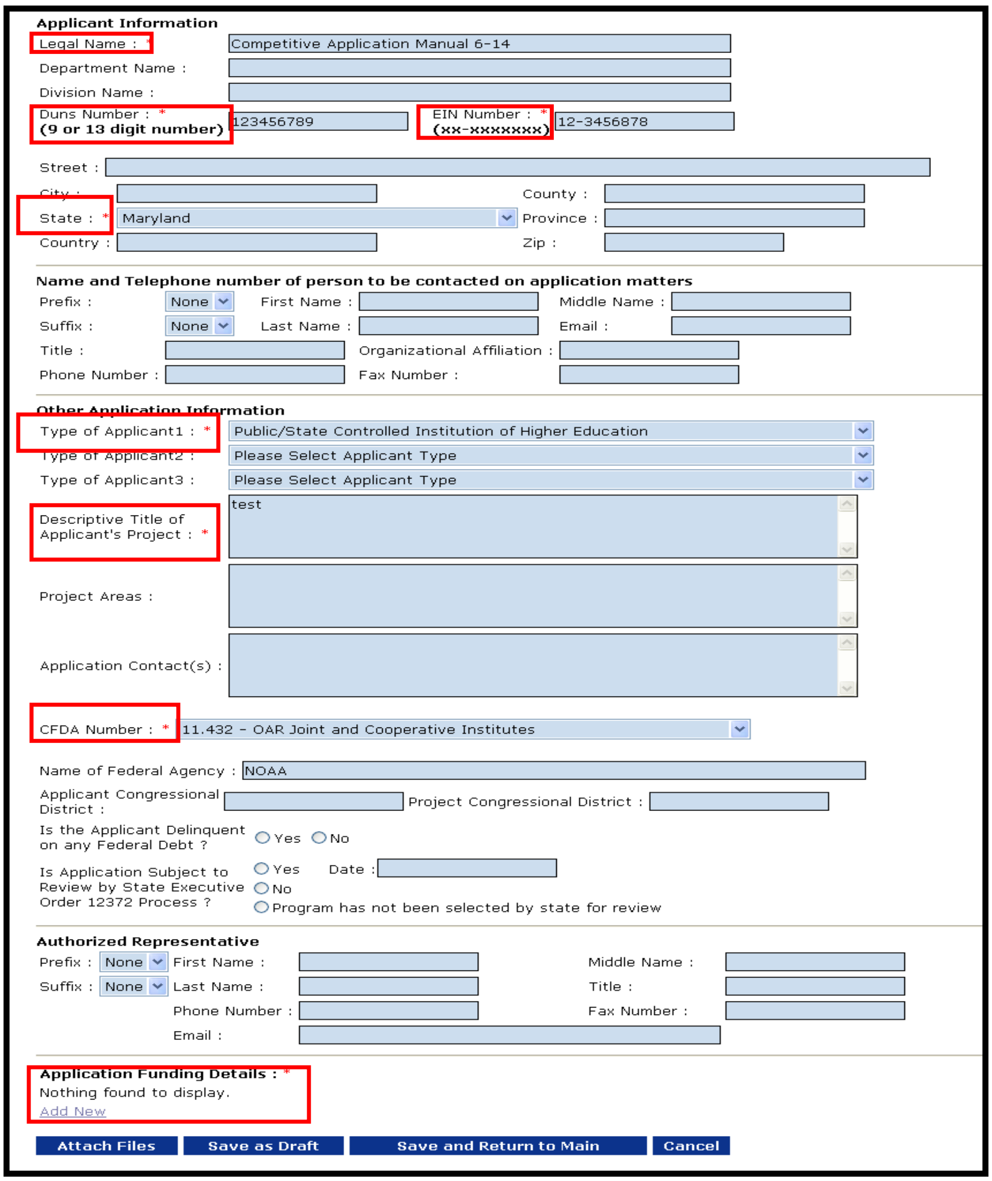
- Project Start Date
- Project End Date
- Federal Agency Received Date/Time
- Total Funding



Note: If this is a multi year award, you will want to enter the start and end date for the entire award, as well as the funding amount for the entire award.

11. Continue entering information on the bottom half of the *Application Details* page (Please note: the picture below represents the bottom portion of the *Application Details* page– you may have to scroll down to see it.)

- Legal Name
- Duns Number
- EIN Number
- State
- Type of Applicant
- Descriptive Tile of Applicant's Project
- CFDA Number
- Application Funding Details



Applicant Information

Legal Name : * Competitive Application Manual 6-14
Department Name :
Division Name :
Duns Number : * (9 or 13 digit number) 123456789
EIN Number : * (xx-xxxxxxx) 12-3456878
Street :
City :
County :
State : * Maryland
Province :
Country :
Zip :

Name and Telephone number of person to be contacted on application matters

Prefix : None
First Name :
Middle Name :
Suffix : None
Last Name :
Email :
Title :
Organizational Affiliation :
Phone Number :
Fax Number :

Other Application Information

Type of Applicant1 : * Public/State Controlled Institution of Higher Education
Type of Applicant2 : Please Select Applicant Type
Type of Applicant3 : Please Select Applicant Type
Descriptive Title of Applicant's Project : * test
Project Areas :
Application Contact(s) :
CFDA Number : * 11.432 - OAR Joint and Cooperative Institutes
Name of Federal Agency : NOAA
Applicant Congressional District :
Project Congressional District :
Is the Applicant Delinquent on any Federal Debt ? Yes No
Is Application Subject to Review by State Executive Order 12372 Process ? Yes Date : No Program has not been selected by state for review

Authorized Representative

Prefix : None
First Name :
Middle Name :
Suffix : None
Last Name :
Title :
Phone Number :
Fax Number :
Email :

Application Funding Details : *
Nothing found to display.
Add New

Attach Files | Save as Draft | Save and Return to Main | Cancel

12. Select the **Add New** link. (Please note: the picture below represents the bottom portion of the *Application Details* page – you will have to scroll down to see it.)

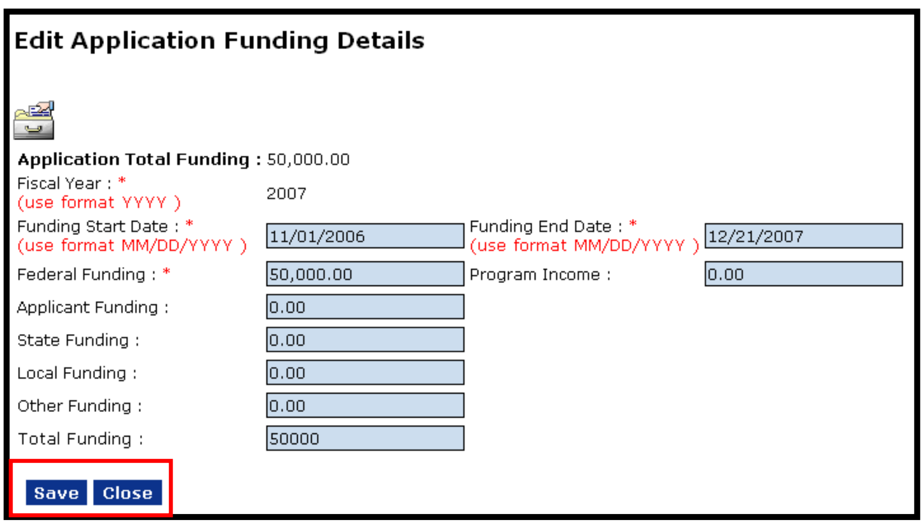
13. Enter the information required in the fields below:

- Fiscal Year
- Funding Start Date
- Funding End Date
- Federal Funding

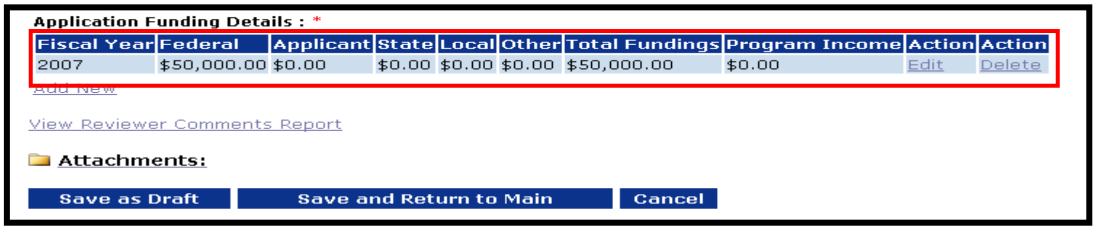
If this is a multi year award, you will want to enter the start and end date for the first year of the award, as well as the funding amount for that year. Repeat process for each additional year.

14. Select **Save** to capture changes and move forward.

a. Select **Close** if you wish to exit the screen. Selecting this option will not capture the changes without saving them first.



15. Note that one year of funding has been identified under Application Funding Details. If this had been a one-year award, the entire funding amount would have been entered during steps 12-14 on the previous page. However, since this is a multi-year award, select **Add New** and provide the information for the second year of funding.


Application Funding Details : *

Fiscal Year	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2007	$50,000.00	$0.00	$0.00	$0.00	$0.00	$50,000.00	$0.00	Edit	Delete

Add New

View Reviewer Comments Report

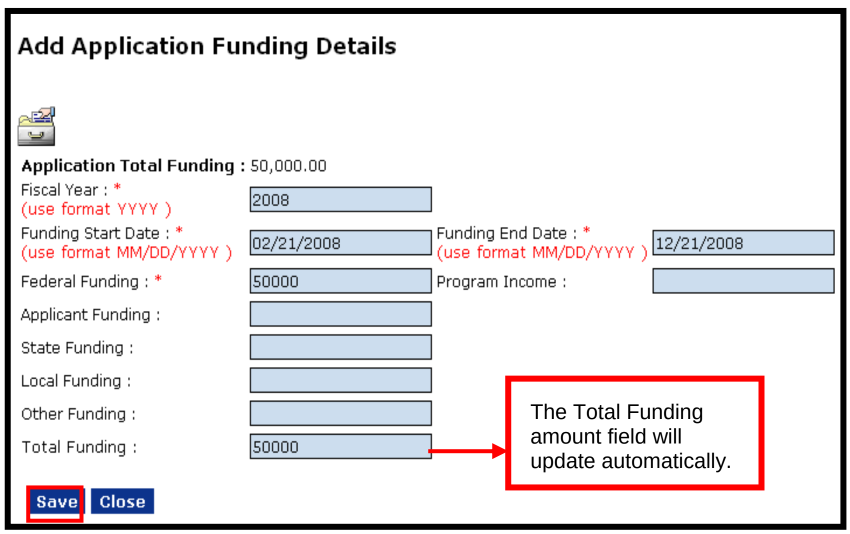
Attachments:

Save as Draft | Save and Return to Main | Cancel

16. Enter in the data for the second year of funding (follow steps 12-14 as a reference)

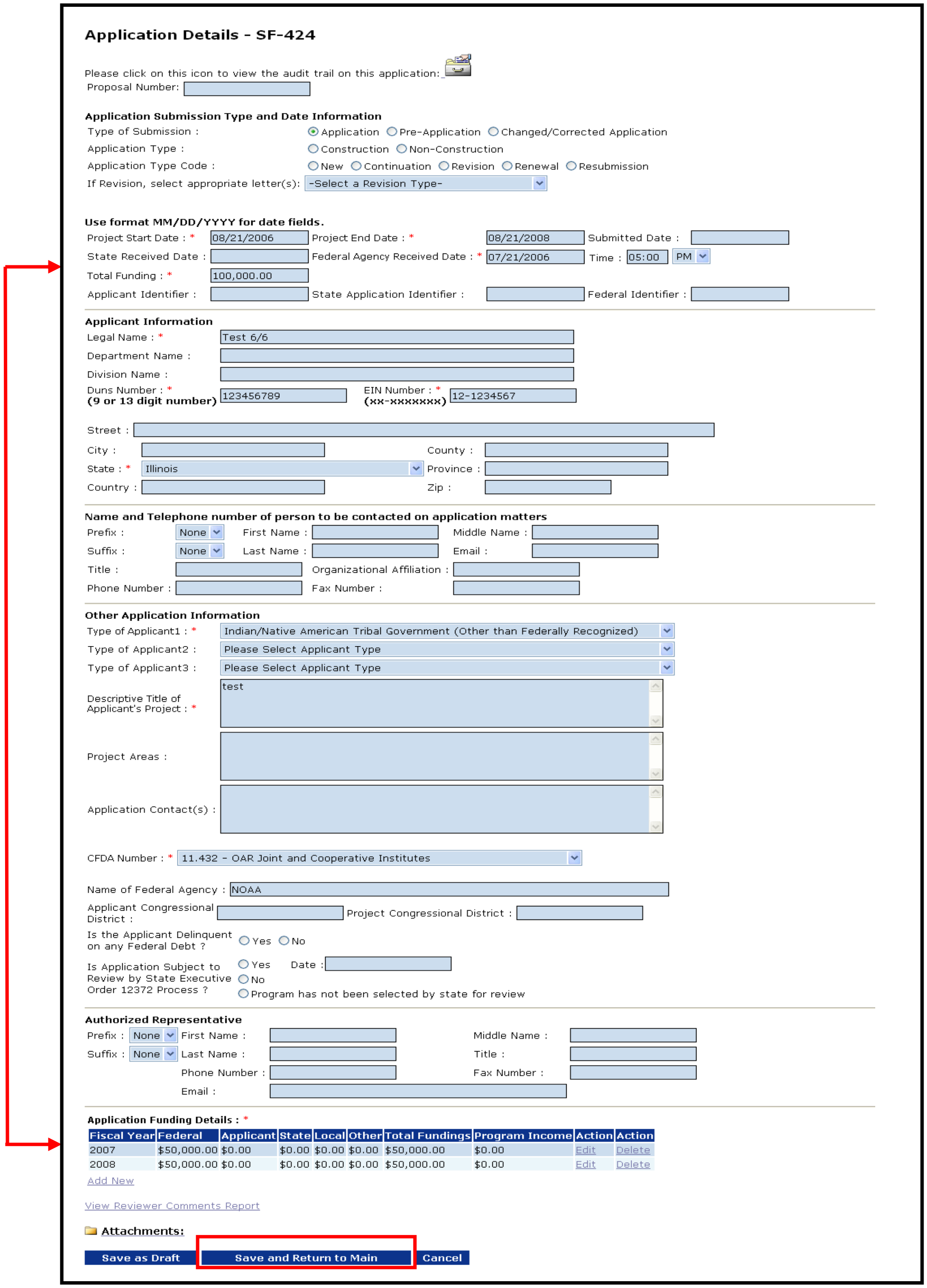
17. Select **Save** to capture changes and move forward.

a. Select **Close** to return to the previous page. In order to save the information entered, you must select **Save** before selecting **Close**.



18. Note that the Total Funding equals the sum of the *Application Funding Details* amounts for FY07 and FY08.

19. Click **Save and Return to Main** to capture the information entered. (See next page for explanation of other buttons)



Application Details - SF-424

Please click on this icon to view the audit trail on this application:
Proposal Number:

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

Use format MM/DD/YYYY for date fields.
Project Start Date : * 08/21/2006 | Project End Date : * 08/21/2008 | Submitted Date :
State Received Date : | Federal Agency Received Date : * 07/21/2006 | Time : 05:00 PM
Total Funding : * 100,000.00
Applicant Identifier : | State Application Identifier : | Federal Identifier :

Applicant Information
Legal Name : * Test 6/6
Department Name :
Division Name :
Duns Number : * (9 or 13 digit number) 123456789 | EIN Number : * (xx-xxxxxxx) 12-1234567
Street :
City : | County :
State : * Illinois | Province :
Country : | Zip :

Name and Telephone number of person to be contacted on application matters
Prefix : None | First Name : | Middle Name :
Suffix : None | Last Name : | Email :
Title : | Organizational Affiliation :
Phone Number : | Fax Number :

Other Application Information
Type of Applicant1 : * Indian/Native American Tribal Government (Other than Federally Recognized)
Type of Applicant2 : Please Select Applicant Type
Type of Applicant3 : Please Select Applicant Type
Descriptive Title of Applicant's Project : * test
Project Areas :
Application Contact(s) :
CFDA Number : * 11.432 - OAR Joint and Cooperative Institutes
Name of Federal Agency : NOAA
Applicant Congressional District : | Project Congressional District :
Is the Applicant Delinquent on any Federal Debt ? Yes / No
Is Application Subject to Review by State Executive Order 12372 Process ? Yes / No / Program has not been selected by state for review | Date :

Authorized Representative
Prefix : None | First Name : | Middle Name :
Suffix : None | Last Name : | Title :
Phone Number : | Fax Number :
Email :

Application Funding Details : *

Fiscal Year	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2007	$50,000.00	$0.00	$0.00	$0.00	$0.00	$50,000.00	$0.00	Edit	Delete
2008	$50,000.00	$0.00	$0.00	$0.00	$0.00	$50,000.00	$0.00	Edit	Delete

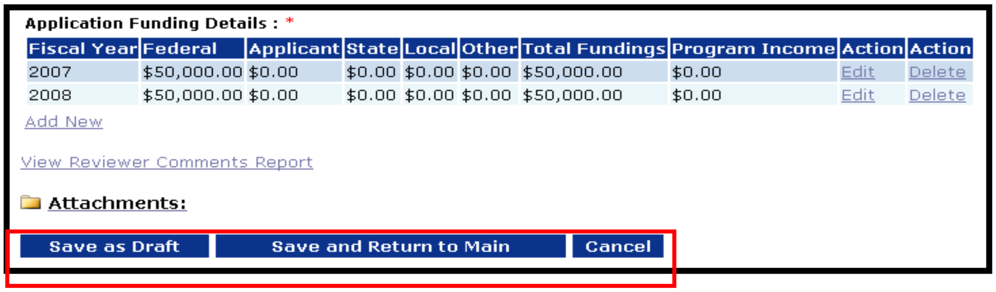
Add New

View Reviewer Comments Report

Attachments:

Save as Draft | Save and Return to Main | Cancel

(Please note: the picture below represents the bottom portion of the *Application Details* page, which you will have to scroll down to see)



Application Funding Details : *

Fiscal Year	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2007	$50,000.00	$0.00	$0.00	$0.00	$0.00	$50,000.00	$0.00	Edit	Delete
2008	$50,000.00	$0.00	$0.00	$0.00	$0.00	$50,000.00	$0.00	Edit	Delete

Add New

View Reviewer Comments Report

Attachments:

Save as Draft | Save and Return to Main | Cancel

Attachments: (Picture of Attach File screen shown on next page)

- Clicking this option will allow you to upload documents that are associated with this application. This is where you upload the scanned documents you received from the applicant.
    - If you forget to attach the documents at this point you will be able to do so during the conduct negotiations stage

Save as Draft

- This button will capture all the information on the page and leave you on this page. If you get a message in RED at the top of the screen it means there is an error. Correct the error and then click Save as Draft again.

Note: If you receive a message in red after clicking **Save** it means the system did NOT capture what was entered – that mandatory information was not provided, or was not in the correct format.

Save and Return to Main

- This will capture the changes you've made and will initiate workflow. Once you click this button a task to conduct minimum requirements will go to the person identified in routing (on the RFA)

Cancel

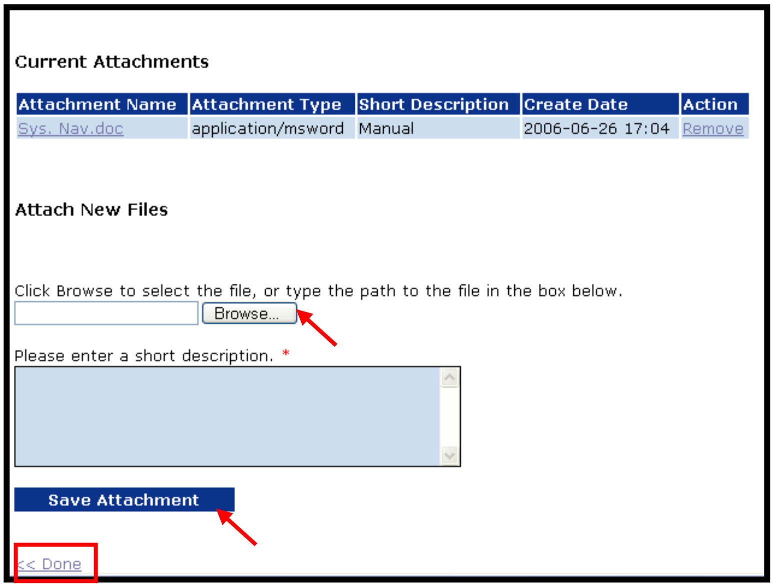
- This button will ignore any recent changes you made to the screen and will take you back one page. Any scanned attachments related to this proposal can be entered here. The screen shot below is displayed when you select the Attach Files button.

20. Select **Browse** to search and select the document you wish to upload.

21. Enter a short description and then select **Save Attachment**.

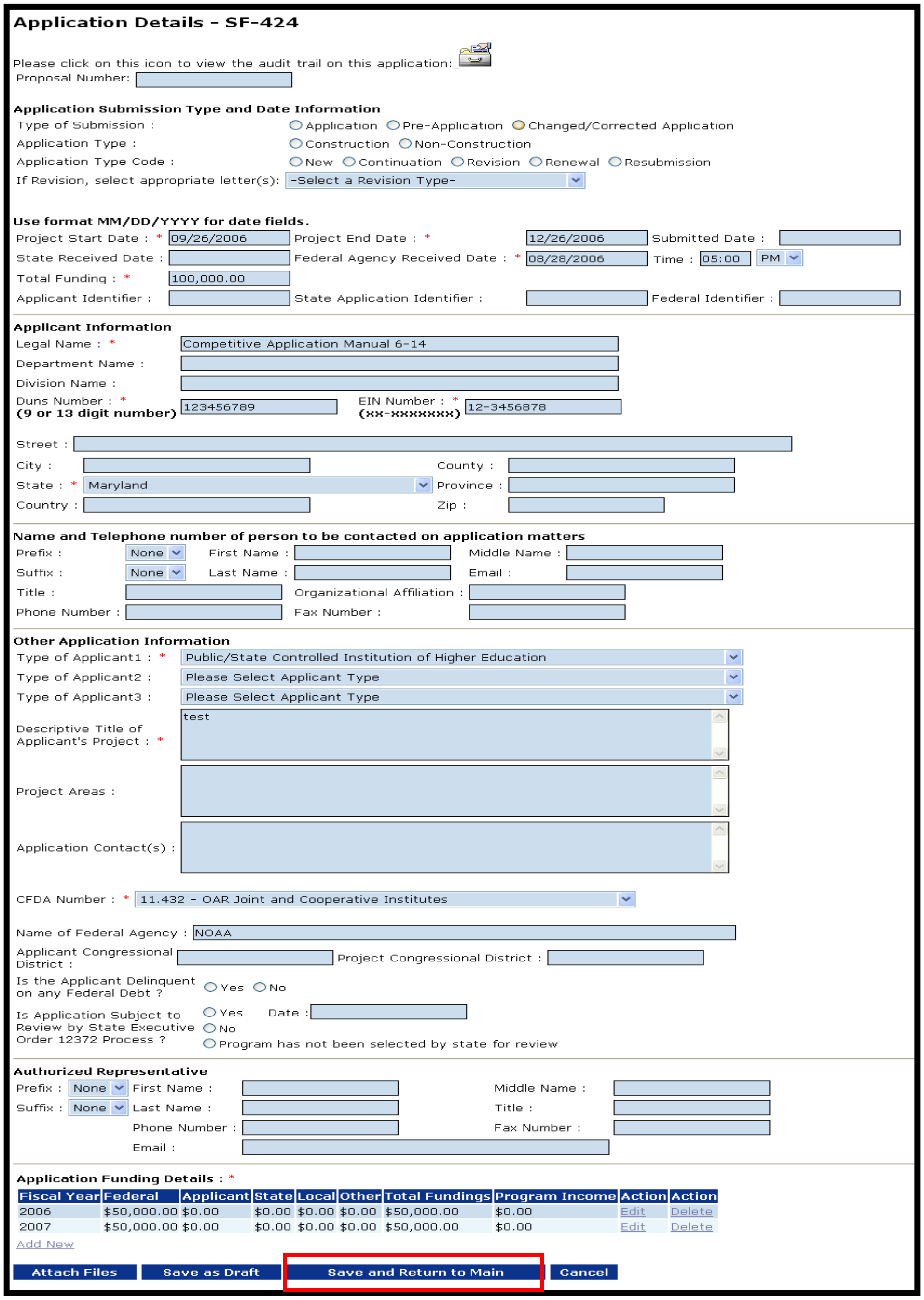
22. Select the **Done** link, once you have finish uploading attachments.

Warning! Do not attach ".eml" (email) files in Grants Online. The system does not recognize this file type and therefore will not open the attachment. Please save your email files as text files before attaching them in Grants Online.



23. Once you have entered all the information, and uploaded any relevant attachments, select **Save and Return to Main**. This will initiate workflow and will send the “Review Minimum Requirements Checklist” task to the individual identified on the RFA to receive applications.

Warning! This will complete the creation of the application and will start workflow on it. The document will be locked and you will not be able to modify the content until the conduct negotiations stage.



Application Details - SF-424

Please click on this icon to view the audit trail on this application:
Proposal Number:

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

Use format MM/DD/YYYY for date fields.
Project Start Date : * 09/26/2006 | Project End Date : * 12/26/2006 | Submitted Date :
State Received Date : | Federal Agency Received Date : * 08/28/2006 | Time : 05:00 PM
Total Funding : * 100,000.00
Applicant Identifier : | State Application Identifier : | Federal Identifier :

Applicant Information
Legal Name : * Competitive Application Manual 6-14
Department Name :
Division Name :
Duns Number : * **(9 or 13 digit number)** 123456789 | EIN Number : * **(xx-xxxxxxx)** 12-3456878
Street :
City : | County :
State : * Maryland | Province :
Country : | Zip :

Name and Telephone number of person to be contacted on application matters
Prefix : None | First Name : | Middle Name :
Suffix : None | Last Name : | Email :
Title : | Organizational Affiliation :
Phone Number : | Fax Number :

Other Application Information
Type of Applicant1 : * Public/State Controlled Institution of Higher Education
Type of Applicant2 : Please Select Applicant Type
Type of Applicant3 : Please Select Applicant Type
Descriptive Title of Applicant's Project : * test
Project Areas :
Application Contact(s) :
CFDA Number : * 11.432 - OAR Joint and Cooperative Institutes
Name of Federal Agency : NOAA
Applicant Congressional District : | Project Congressional District :
Is the Applicant Delinquent on any Federal Debt ? Yes / No
Is Application Subject to Review by State Executive Order 12372 Process ? Yes / Date : / No / Program has not been selected by state for review

Authorized Representative
Prefix : None | First Name : | Middle Name :
Suffix : None | Last Name : | Title :
Phone Number : | Fax Number :
Email :

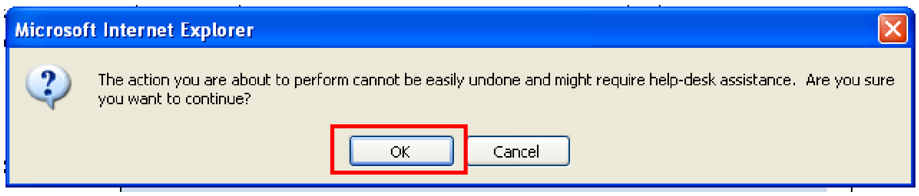
Application Funding Details : *

Fiscal Year	Federal	Applicant	State	Local	Other	Total Fundings	Program Income	Action	Action
2006	$50,000.00	$0.00	$0.00	$0.00	$0.00	$50,000.00	$0.00	Edit	Delete
2007	$50,000.00	$0.00	$0.00	$0.00	$0.00	$50,000.00	$0.00	Edit	Delete

Add New

Attach Files | Save as Draft | Save and Return to Main | Cancel

24. Upon selecting **Save and Return to Main**, a warning message will appear notifying you that this will complete the creation of the application and workflow will start. The Document will be locked and changes cannot be made. Select the **OK** button to proceed.

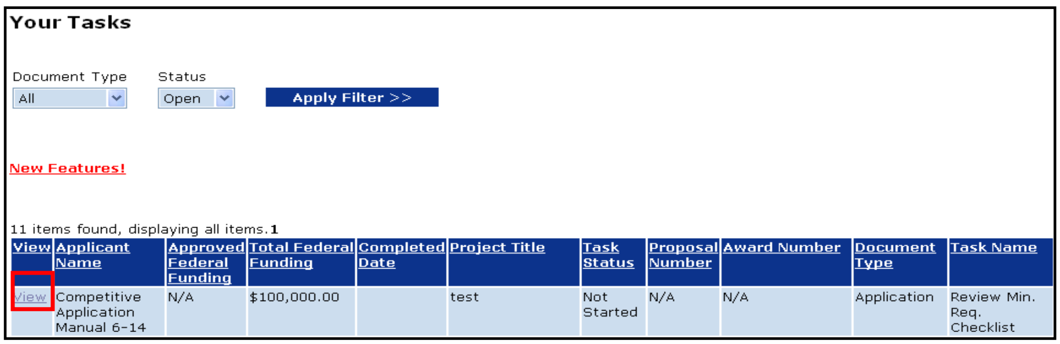


Performing Minimum Requirements Check

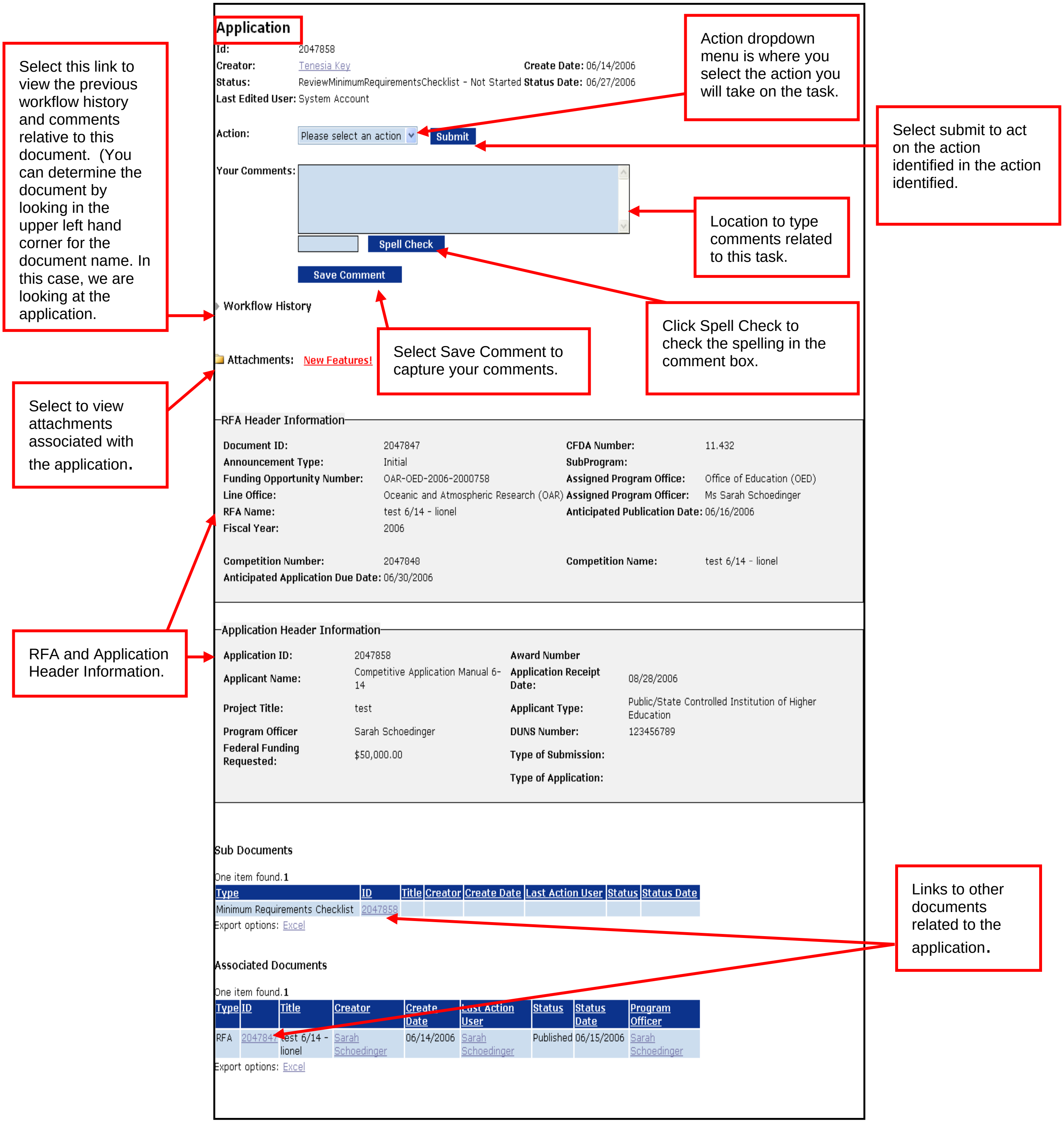
Once an application has been submitted electronically through Grants.gov or inputted as a paper application, the Federal Program Officer (FPO) will have to perform a Minimum Requirements check. The items on this checklist represent specific criteria identified by the Federal Program Officer (FPO) who created the RFA. It is your choice as the Federal Program Officer (FPO) to decide whether to Approve or Reject the application. This section reviews the Review Minimum Requirements task.

Minimum Requirements Checklist

1. Select the **Inbox** tab.
2. Select the **Tasks** link.
3. Select the **View** link for the **Review Min. Req. Checklist** task.



4. The following screen is the *Task Launch* page. From this page you may complete your task by selecting an action form the action dropdown menu followed by the Submit button. You may enter a comment in the COMMENT field, but may wish to wait until after viewing the application.



5. From the action dropdown menu, you can select from the following options:

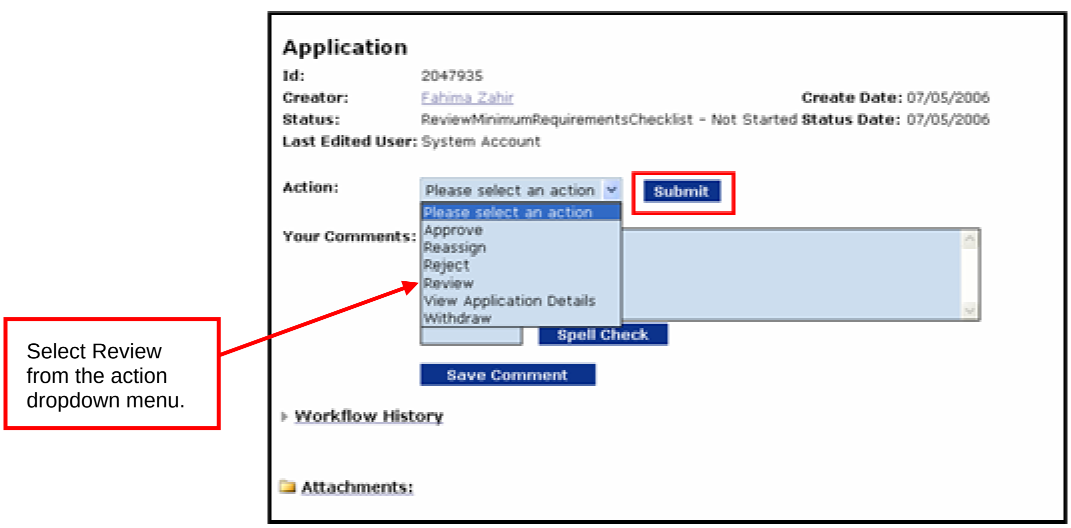
- **Approve** – this action approves the Minimum Requirements Checklist (meaning the applicant meets the most basic of requirements – eligibility, complete application, etc).

Warning! Once you select Approve and click Submit, you will initiate workflow – a task will be sent to the individual identified in the RFA routing to conduct negotiations

- **Reassign** – This action allows for you to reassign this task to another program officer. Whoever conducts the Minimum Requirements checklist will be the program officer of record, and will be the individual who will also conduct negotiations, as well as work on the PO Checklist, NEPA document, and Procurement Request and Commitment of Funds.
- **Reject** – This action will reject the application. Once you select Reject and click **Submit** you **will not** be able to reverse the rejection.
- **Review** – This action allows you to view the minimum requirements and enter information into the document.
- **View Application Details** – Select this action to view the details of the application so that you can verify that all the information is correct before completing the Minimum Requirements.
- **Withdraw** – This action will be performed when the user informs you that they no longer wish to be considered for this opportunity

6. Select an option form the action dropdown menu. This section will review the workflow path for Reviewing the Minimum Requirements. Select **Review** from the action dropdown menu, followed by **Submit**.

7. If you wish to enter any comments, enter and save them in the Comment box underneath the action dropdown menu. Once you have entered your comments (if any), select the appropriate action and click Submit.

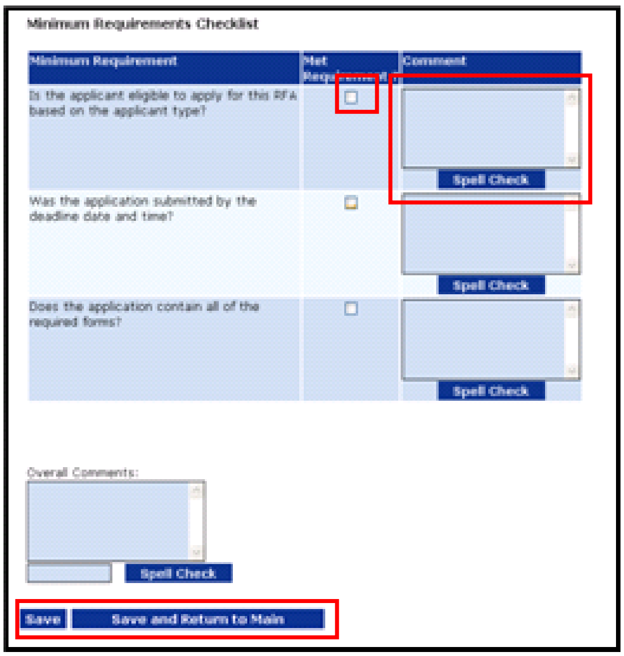


8. The next screen that appears is the *Minimum Requirements page*. Check the appropriate fields if the applicant met the requirement. Place a check mark in the Met Requirement box and feel free to enter comments.

Note: You as the Program Officer have the power to say the applicant met the Minimum Requirements – the system will not check for you. You are the deciding factor as to whether this application goes on for further review.

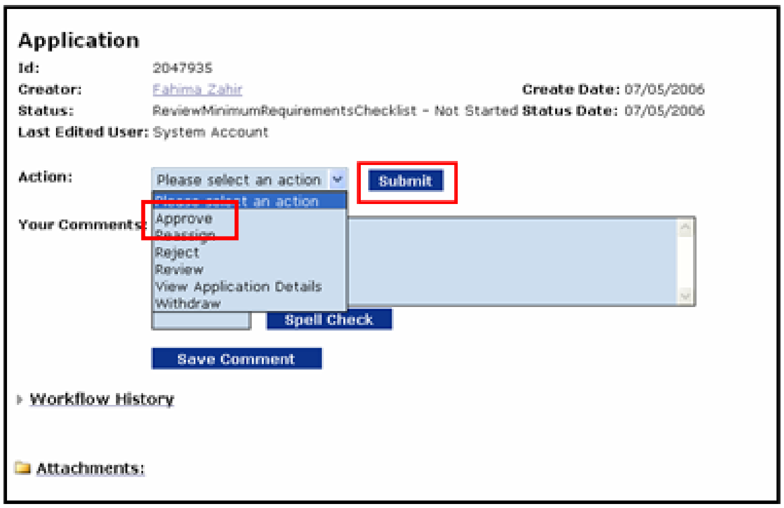
9. Select **Save** to capture the information entered.

10. Select **Save and Return to Main** to continue processing the task.



11. When completing the Minimum Requirements Checklist and saving the information, the Task *Launch* page is displayed. From the action dropdown menu, the same actions are available for selection. If you are finish with all actions associated with this task, select **Approve** from the action dropdown menu, followed by **Submit** to complete the review process. If you would like to enter comments, enter and save the comments in the COMMENT field before submitting the action.

Warning! Once you select Approve and click Submit, you will initiate Workflow and the document will be locked.



Conducting Negotiations

Once you have completed the Minimum Requirements Checklist task, the Conduct Negotiations task will be generated. The Conduct Negotiations phase is a critical phase of processing during Grants Online. This step allows the Program Officer to do the following:

- Assign a new award number or associate an award number
- Identify the agreed upon start and end date for the award
- Identify the final negotiated funding amount for the award
- Associate an organization to the award
- Associate an Authorized Official to the award
- Break out any funding years (if needed)
- Attach any files to the application (updated documents, reviewer responses, etc.)

1. Select the **Inbox** tab.

2. Select the **Tasks** link.

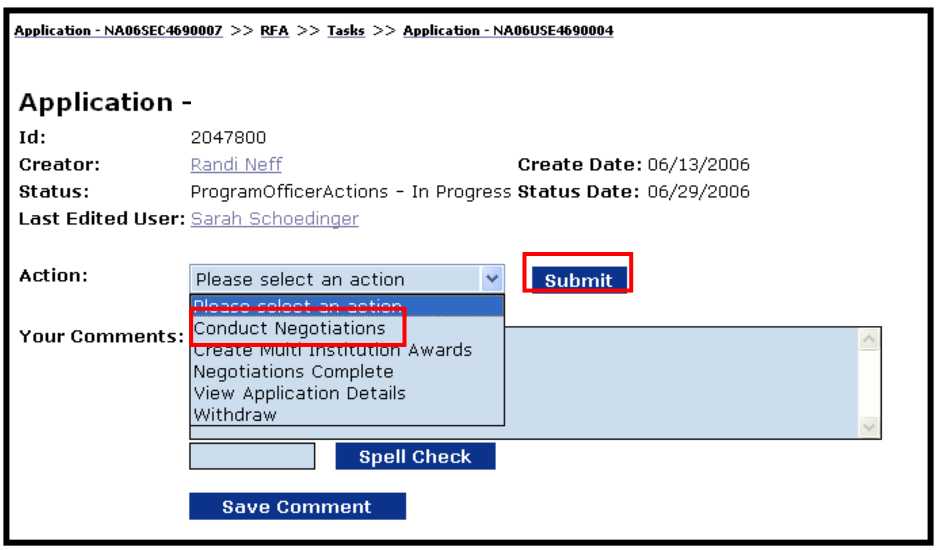
3. Select the **View** link for the **Conduct Negotiations** task.

4. Upon selecting the **Conduct Negotiations** task from your inbox, the *Task Launch* page is displayed. From the action drop down menu, you can select from the following options:

- Conduct Negotiations - This action will open the application and allow you to make changes.
- Create Multi Institution Awards - This action will allow you to work on creating a multi institution Award.
- Negotiations Complete – This action is selected when you are finished negotiating the application.
- View Application Details - This action allows for you to view the details of the submitted application.
- Withdraw - This is selected if you no longer want to continue to process the application.

5. Select **Conduct Negotiations** for the purpose of this manual.

6. Select **Submit.**



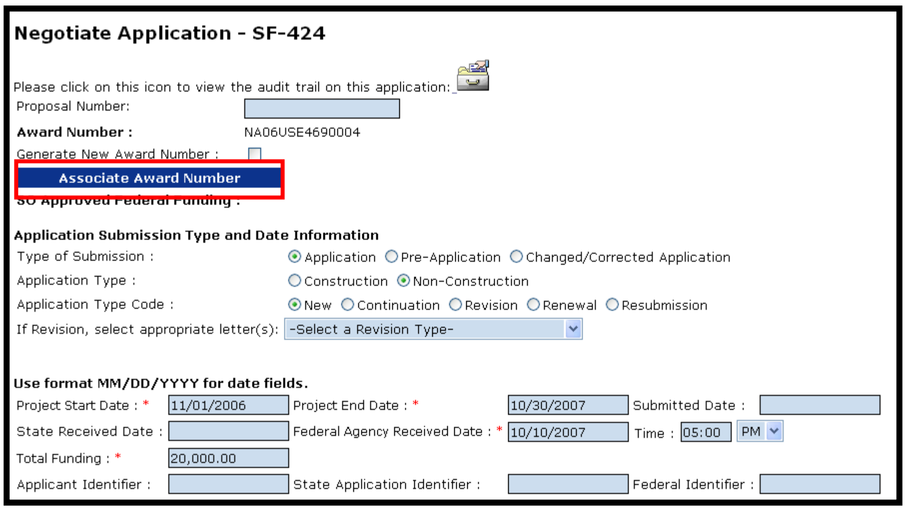
Warning! You cannot reverse the action of withdrawing an application. Only do this if you are sure the applicant no longer wishes to be considered for the Award.

7. Enter a Proposal Number - this is an optional field. This field will be very useful in identifying individual proposals and is especially helpful when receiving multiple submittals. This identifier can also be used as a search term when searching for the application via the “Application” tab.

8. Award Number (You must select one)

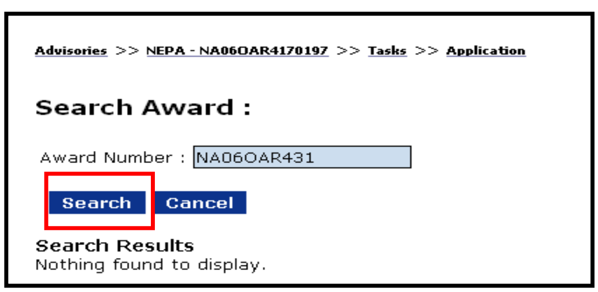
- Associate Award Number – use this if the application is for a continuation OR,
- You will want to either Generate a New Award Number by clicking the checkbox. (Proceed to Step 13)

9. In order to associate an award number, select the **Associate Award Number** button.

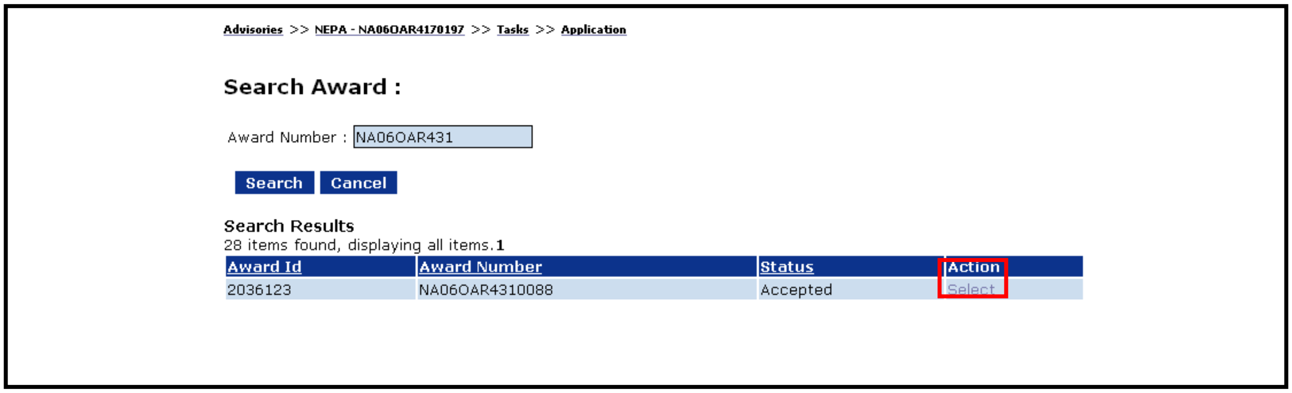


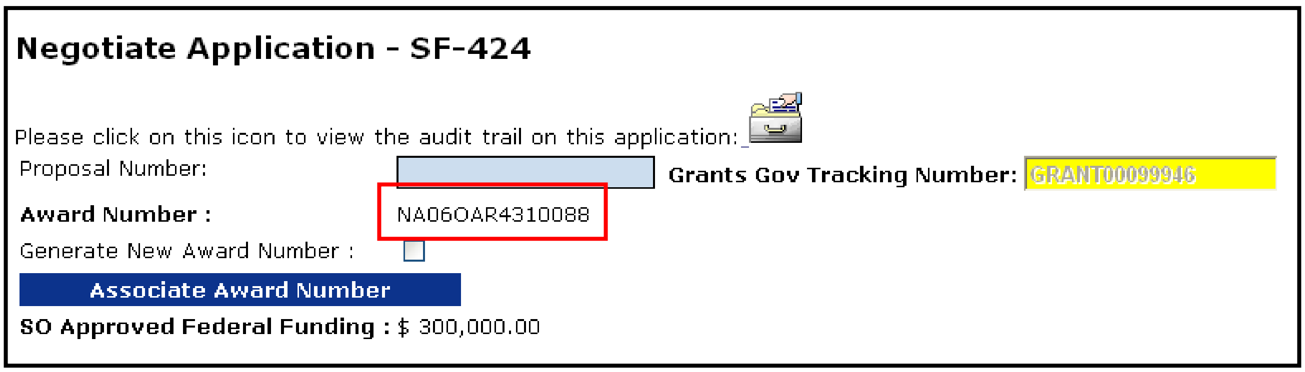
10. Type in the Award Number.

11. Select Search.

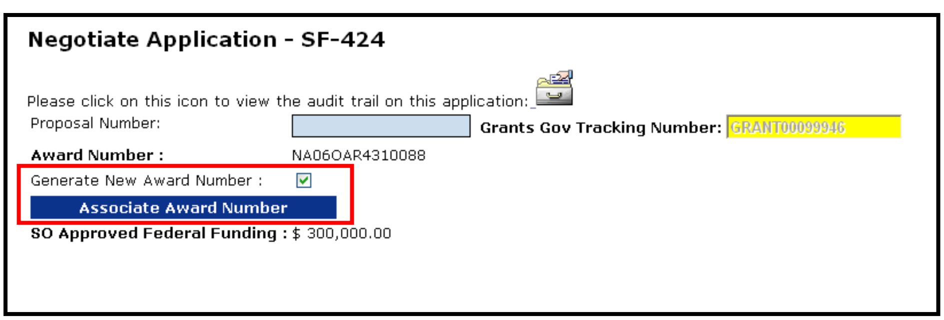


12. Associated Award number displays. Click the **Select** link to associate the award number to the application.

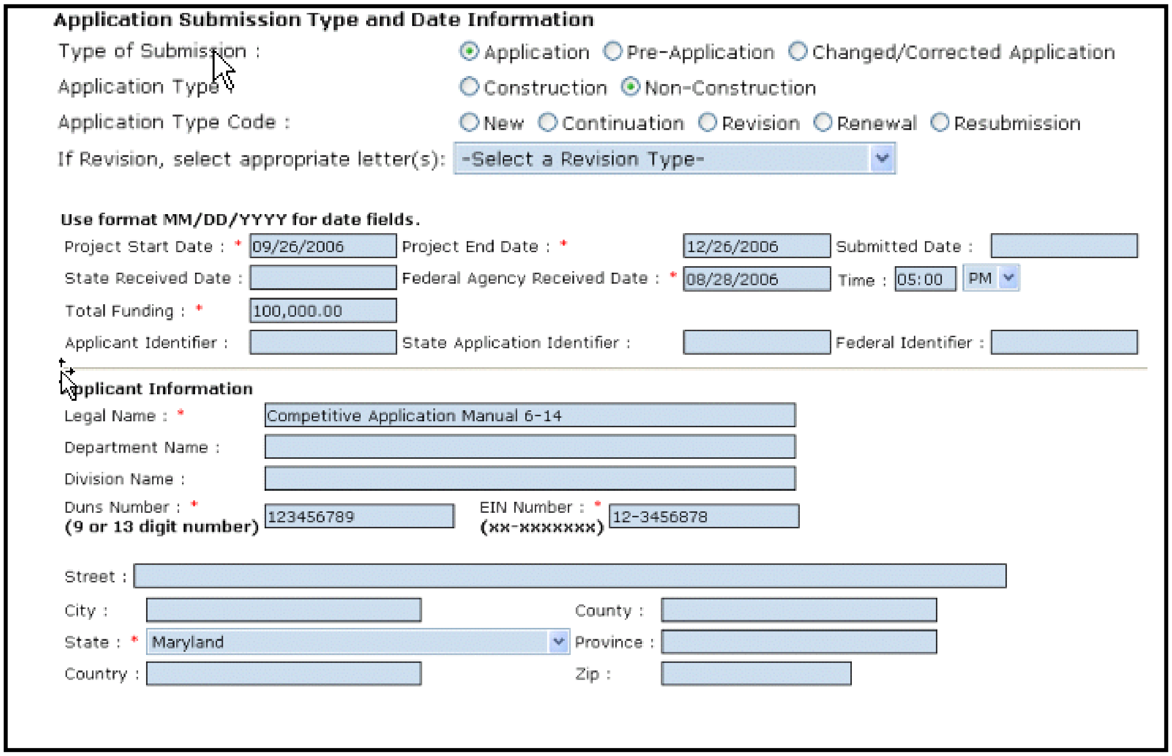




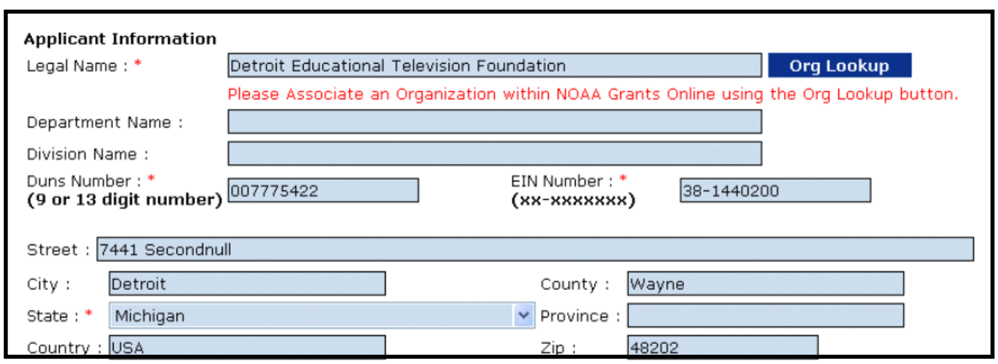
13. Alternatively, to create a new award number, place a check mark in the box next to the Generate New Award Number line. (Award number will appear after you click the "Save" button at the bottom of the page.)



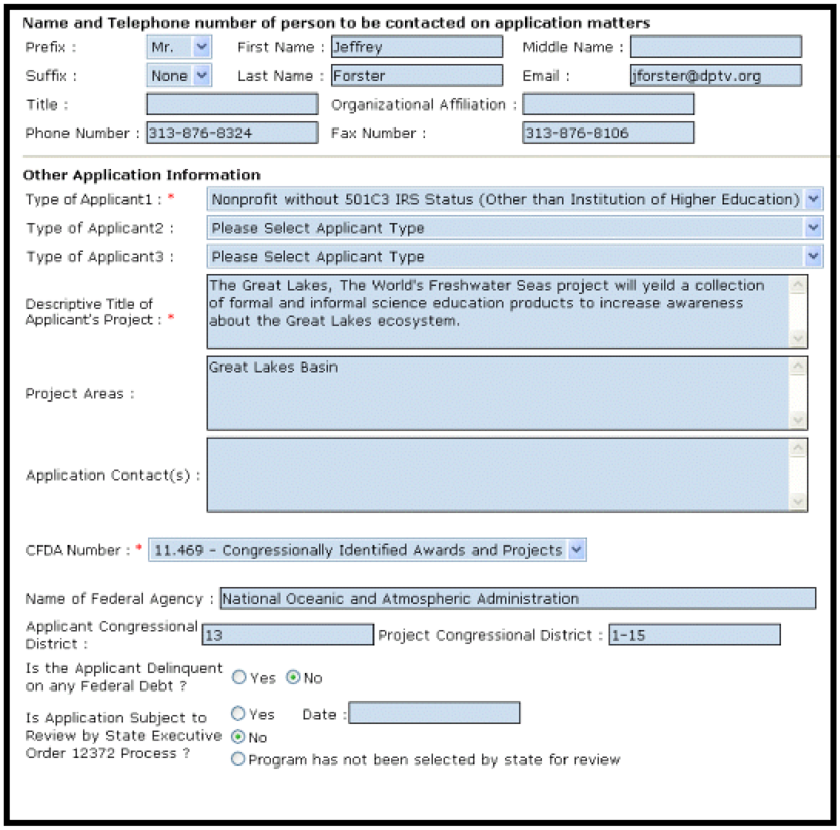
14. Continue to Review the application and you also have the option to edit any information on this page. Be sure that all required fields mark with a red asterisk is completed.



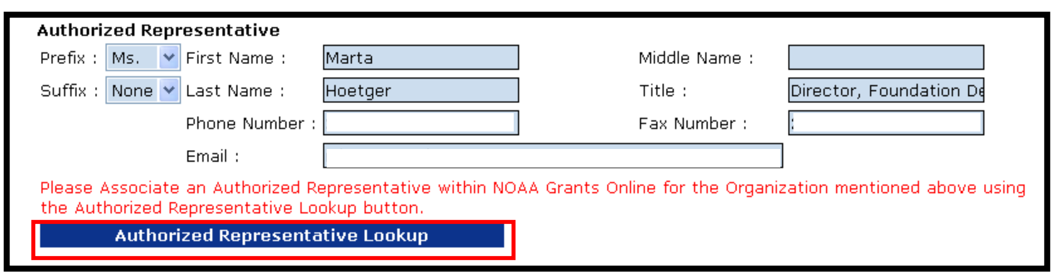
15. Associate an Organization to the application. Although recipient information is filled in, you still must perform the Organization lookup to verify that the organization is within NOAA Grants Online. Select the **Org Lookup** button.



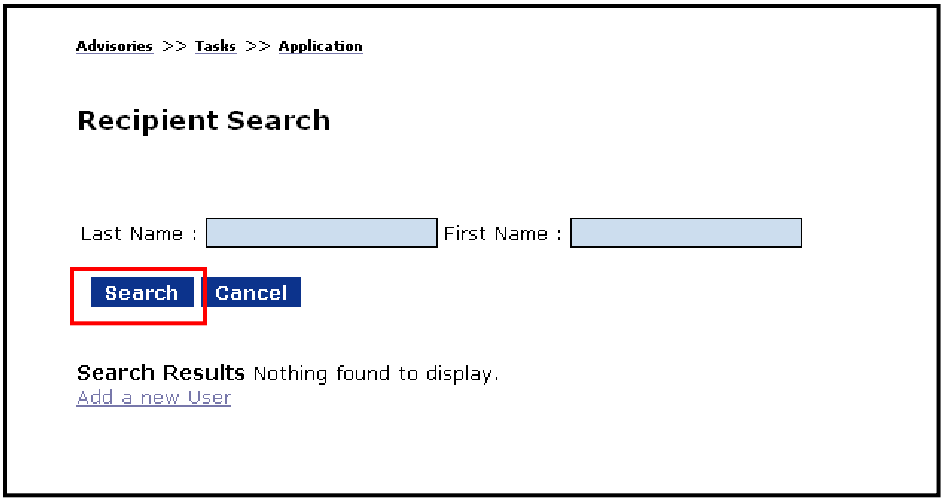
16. After you have associated an organization, continue to review the application.



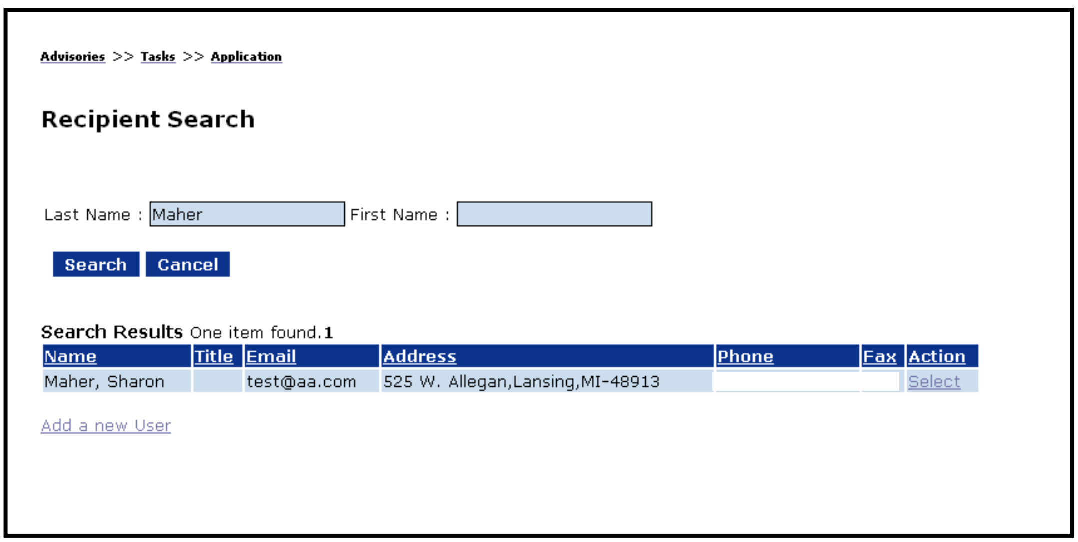
17. At the bottom of the application, you will be required to associate an Authorized Representative to the application. Although recipient information is filled in, you still must perform the Authorized Representative lookup to verify that the recipient is within NOAA Grants Online for the organization. Select the **Authorized Representative Lookup** button.



18. The following screen is the recipient search screen. Enter the user last name and/or first name, followed by **Search**.



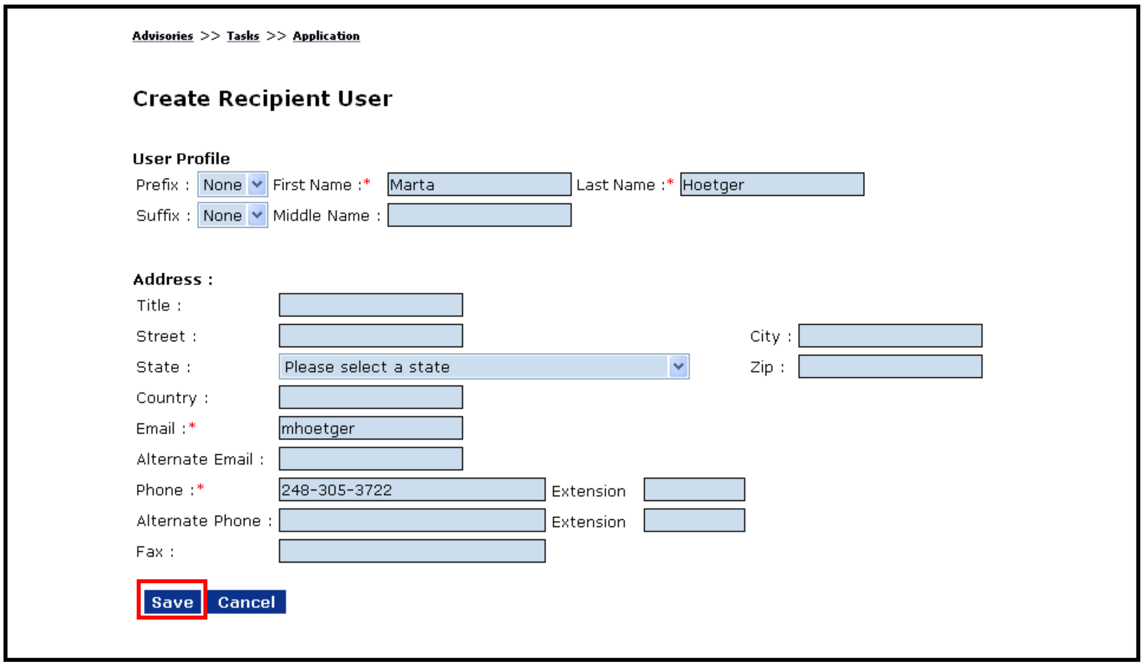
19. The search results will appear. If the Authorized Representative name is available in the search results, press the **Selec**t link. If you select this option you will be prompted the application page to continue conducting negotiations. If your search results do not return the needed information, select the **Add a new User link**.



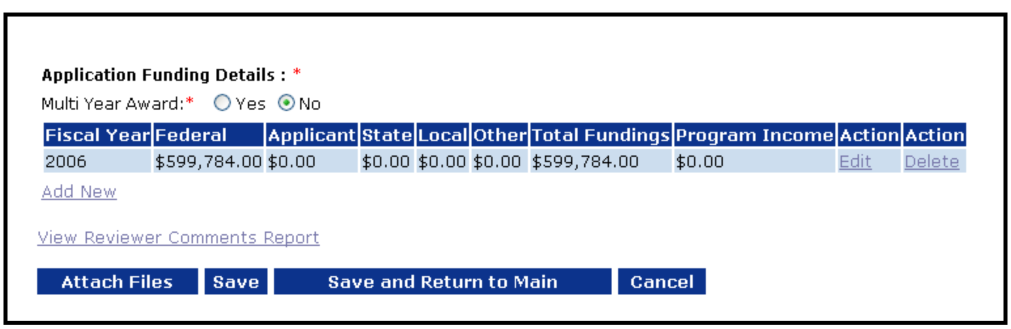
20. If **Add a new User** is selected, the Create Recipient User page will appear. Enter the Authorized Representatives first and last name followed by the email address and telephone number. The other information the fields are optional but can be useful.

21. Once all the required and optional information has been entered, select **Save**. You will then be prompted back to the conduct negotiations page to continue working on the application.

22. Once all the required and optional information has been entered, select Save. You will then be prompted back to the conduct negotiations page to continue working on the application.



23. Once all the required and optional information has been entered, select **Save**. You will then be prompted back to the conduct negotiations page to continue working on the application. The next section to complete is the Application Funding Details. Review the funding lines and edit each line by selecting the **Edit** or **Delete** link. If additional lines are needed, select the **Add New** link. (Refer to Step 15, under the Input Paper Application section of this manual.)



24. Once you have completed negotiating the application. Select the **Save and Return to Main** button located at the bottom of the page. You will be prompted back to you Conduct Negotiations *Task Launch* page. From the action dropdown menu, select **Negotiations Complete**.

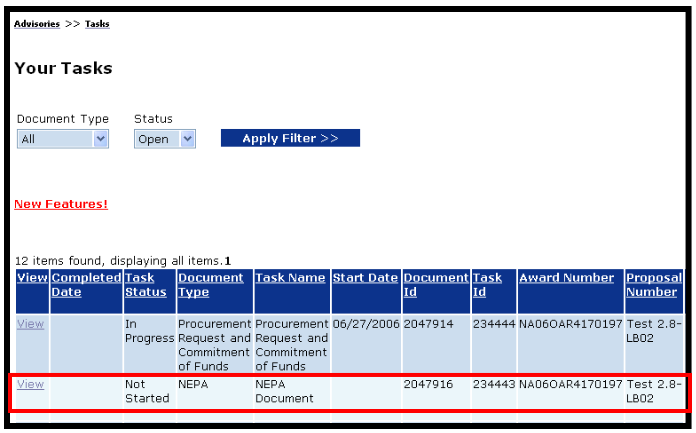
Program Officer Preparation of Selection Documents

Once you completed conducting negotiations, three tasks are sent to the Program Officer task inbox. These tasks consist of the PO Checklist, the NEPA Document and the Procurement Request and Commitment of Funds (CD435). The following sections will review the process of completing these documents.

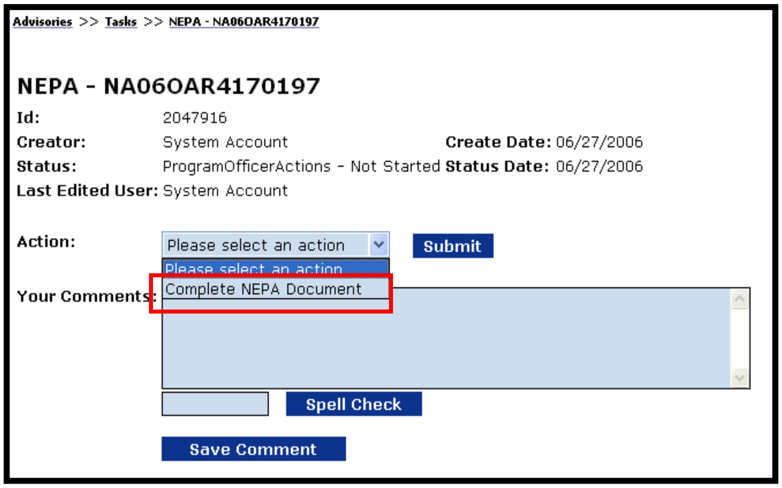
NEPA Document

The NEPA Document allows you to attach the NEPA menu that was created for your organization. This section reviews the process of completing your NEPA document.

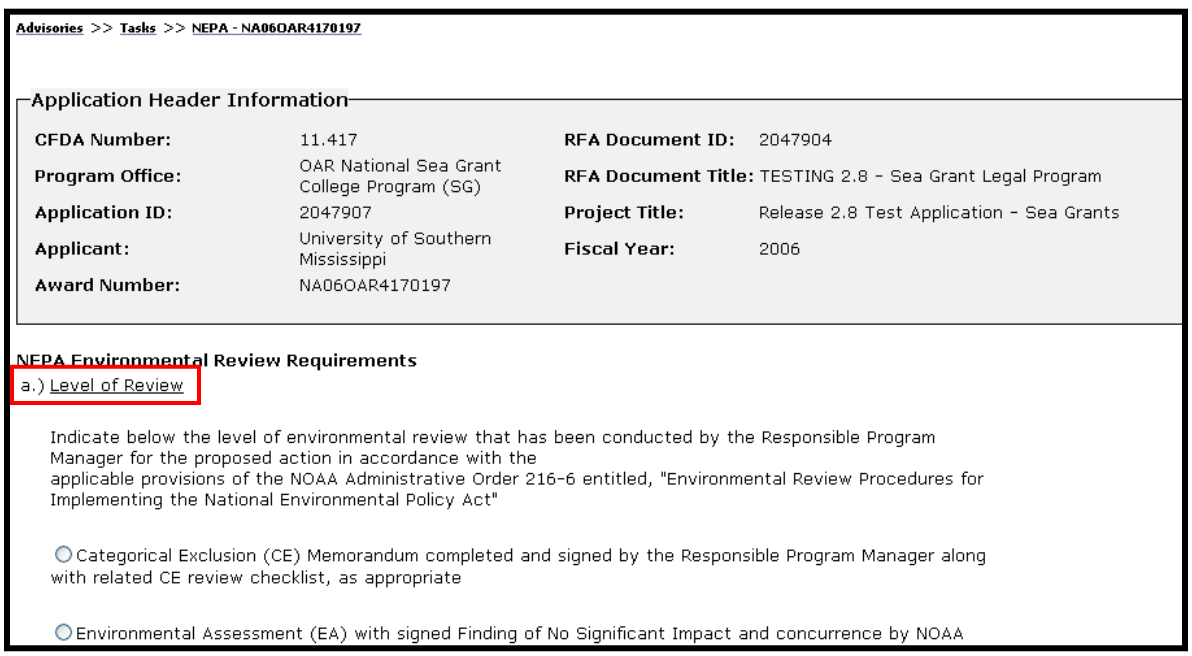
1. Select the **Inbox** tab.
2. Select the **Tasks** link.
3. Select the **View** link for the **NEPA Document** task.



4. The following screen is the task launch page. From the action dropdown menu select **Complete NEPA Document**.



5. Select Level of Review.



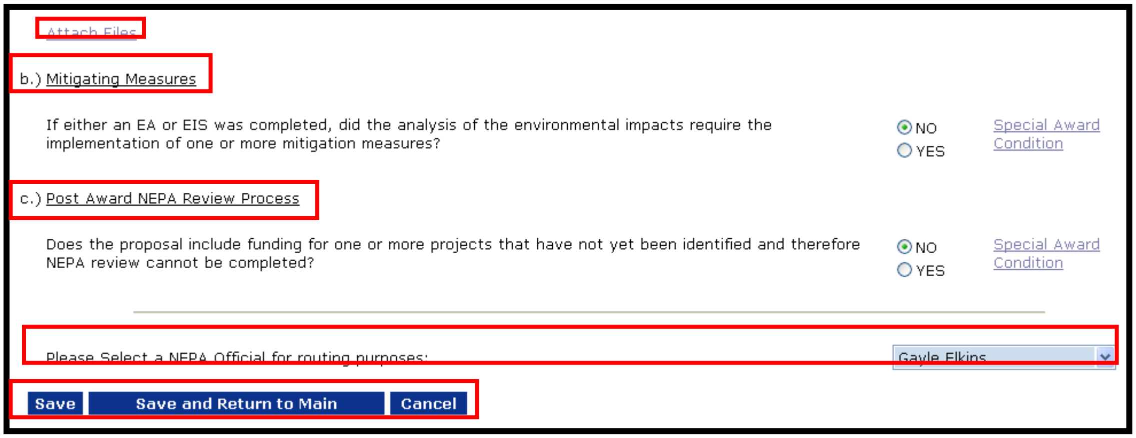
6. Select the Attach Files link and upload the NEPA memo.

7. Complete Mitigating Measures.

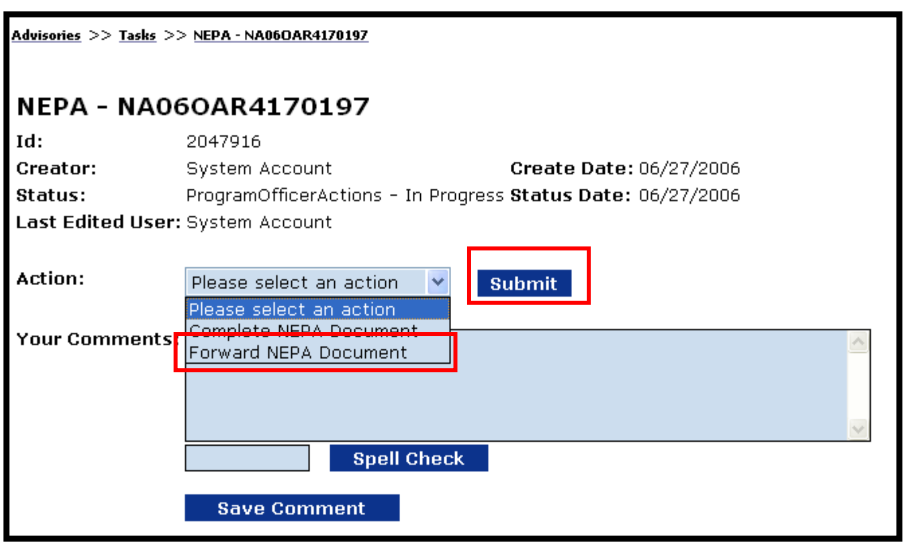
8. Complete Post Award Review Process.

9. Select a NEPA Official from the dropdown menu.

10. Click **Save** to save your information entered and remain on this page OR click **Save and Return to Main** to complete the task.



11. After completing and reviewing the NEPA document, you will have the option to forward the document to the NEPA Official. From the action dropdown menu, **select Forward NEPA Document**, followed by **Submit**.



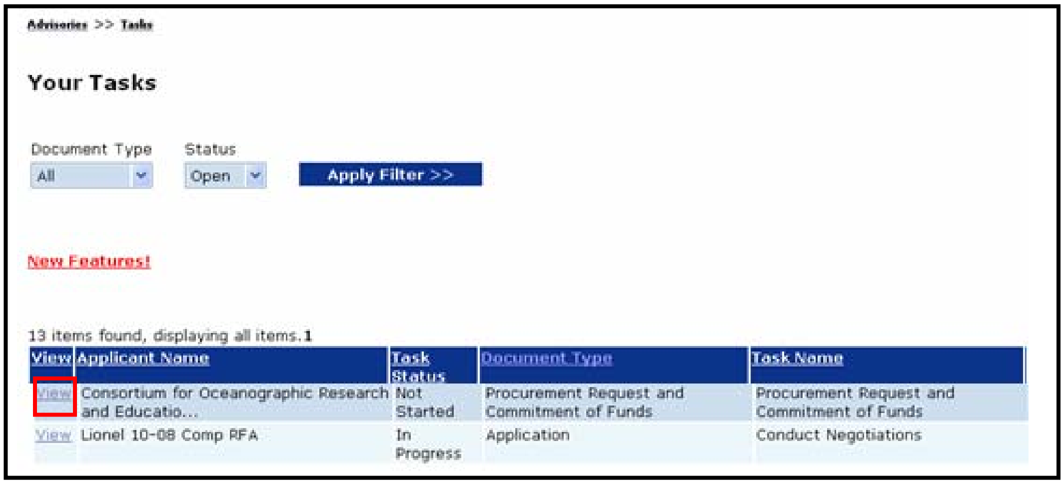
Procurement Request and Commitment of Funds

This document allows you to complete the budgetary information that will later be signed off by the Request Authorizing Official (Budget Officer). The Procurement Request and Commitment of Funds document is also known as the CD-435.

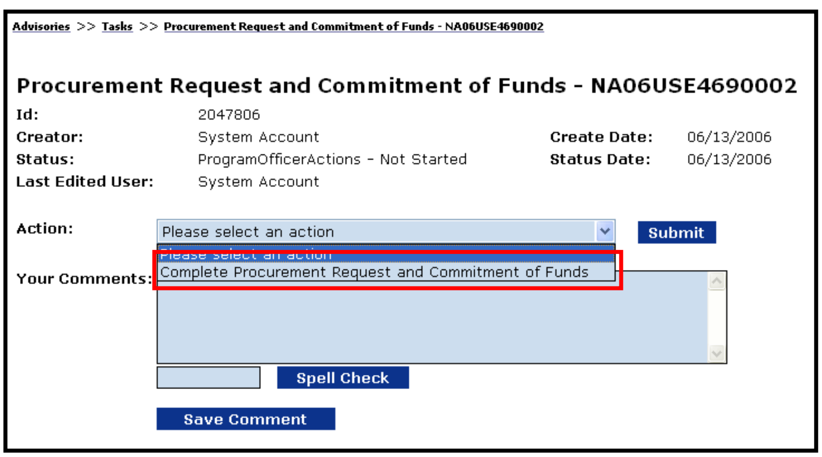
1. Select the **Inbox** tab.

2. Select the **Tasks** link.

3. Select the **View** link for the **Procurement Request and Commitment of Funds** task.

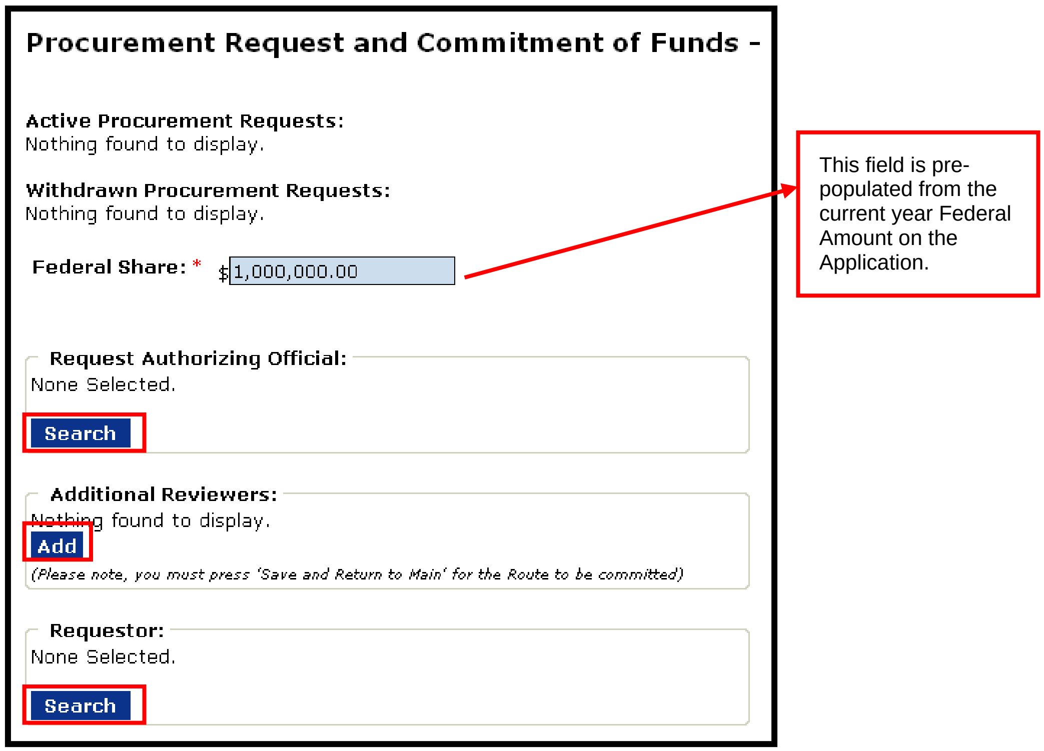


4. The following screen is the task launch page. From the action dropdown menu select **Complete Procurement Request and Commitment of Funds**.



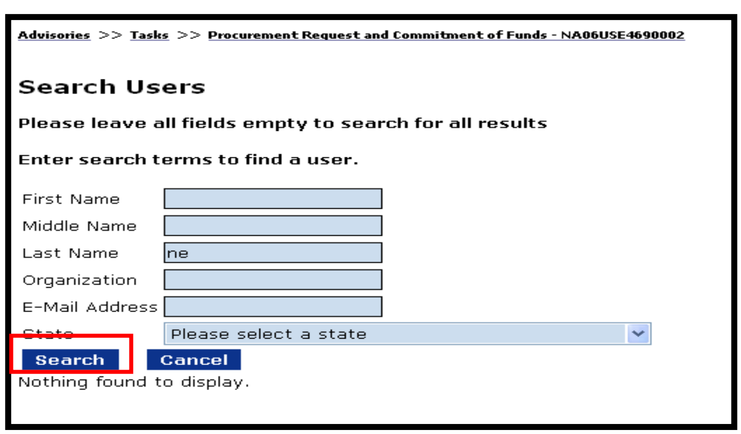
5. The ***Procurement Request and Commitment of Funds*** screen is displayed. Complete the mandatory fields marked with an asterisk. This includes selecting the Request Authorizing Official and Requestor using the ***Search*** buttons. You may also add additional Optional Reviewers by selecting the ***Add*** button in the ***Additional Reviewers*** section.

6. Click **Search** to select the Request Authorizing Official (Budget Officer)**.**

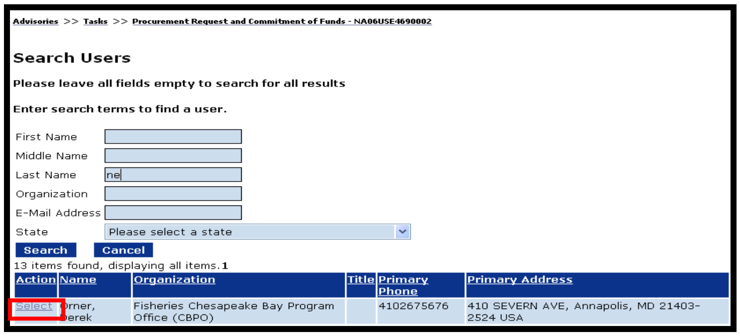


7. Enter search criteria into at least on the query fields listed.

8. Click **Search** (the “Nothing found to display” message remains displayed until you select the **Search** button.)

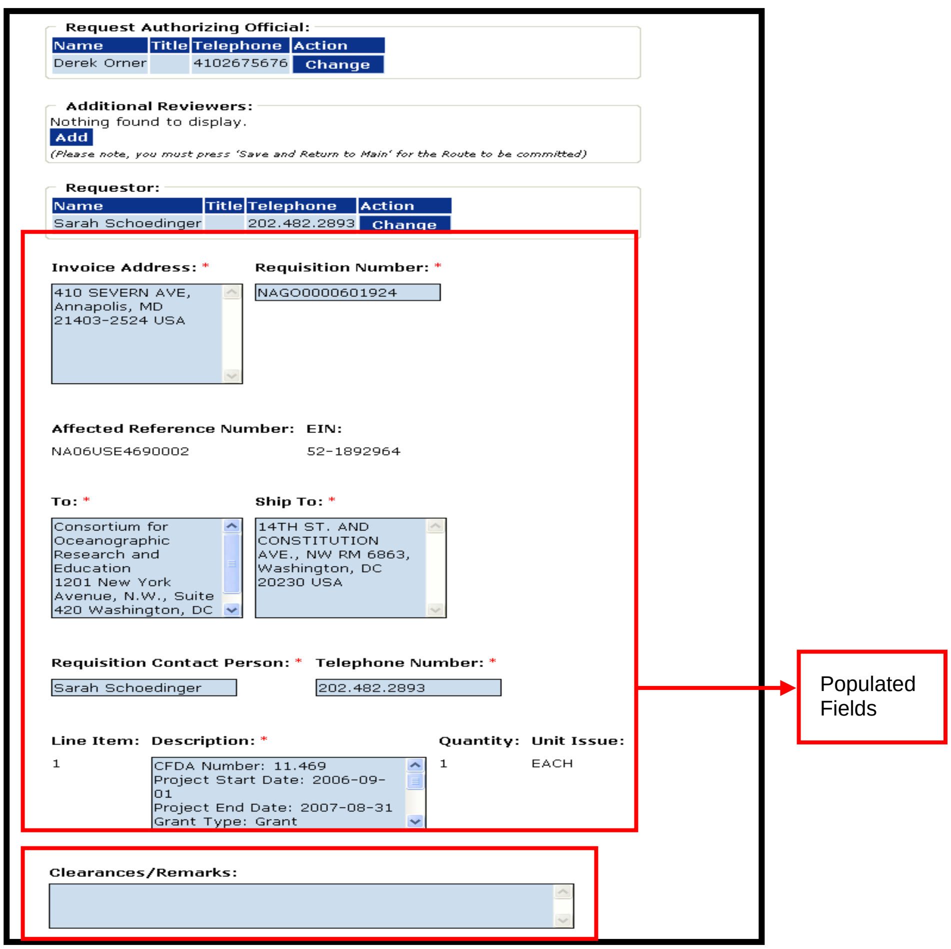


9. Select the individual you wish to choose as the Request Authorizing Official by clicking on the **Select** link.

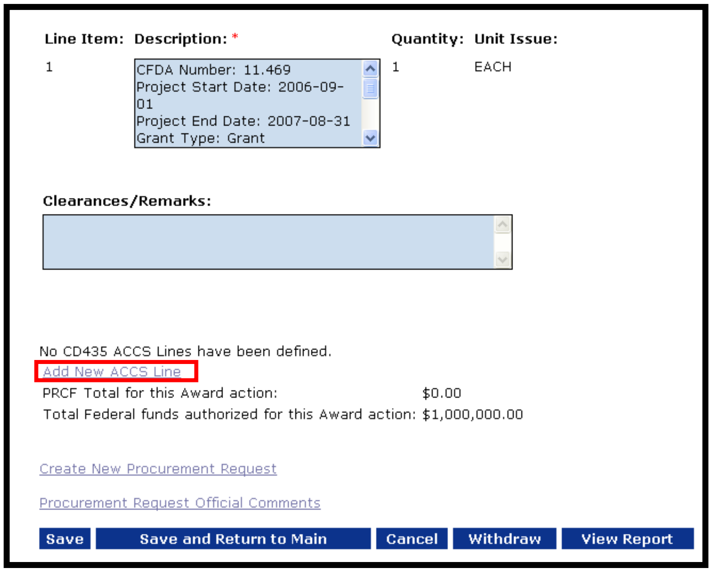


10. The Request Authorizing Official (Budget Officer) name that was selected is now listed on the Procurement Request and Commitment of Funds (Cd-435). Follow steps 6-9 to select Additional Reviewer(s) and/or Requestor.

Note: Once the Request Authorizing Official (Budget Officer) and Requestor are identified, the other mandatory fields will populate. Use the Clearance/Remarks field to enter comments, if applicable.



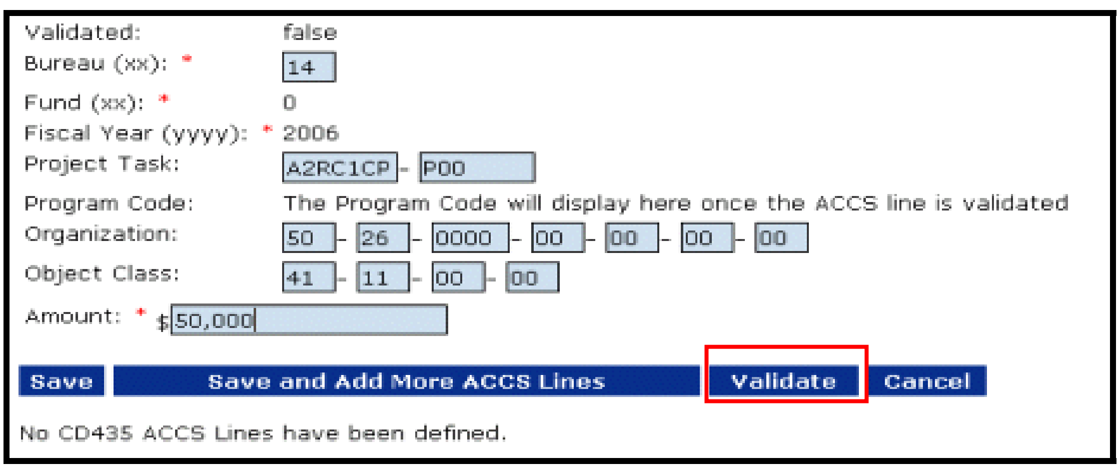
11. To complete the ACCS lines, select the **Add New ACC Line** link.



12. In the ACCS details screen, enter the following:

- Bureau
- Project Task
- Organization
- Object Class
- Amount

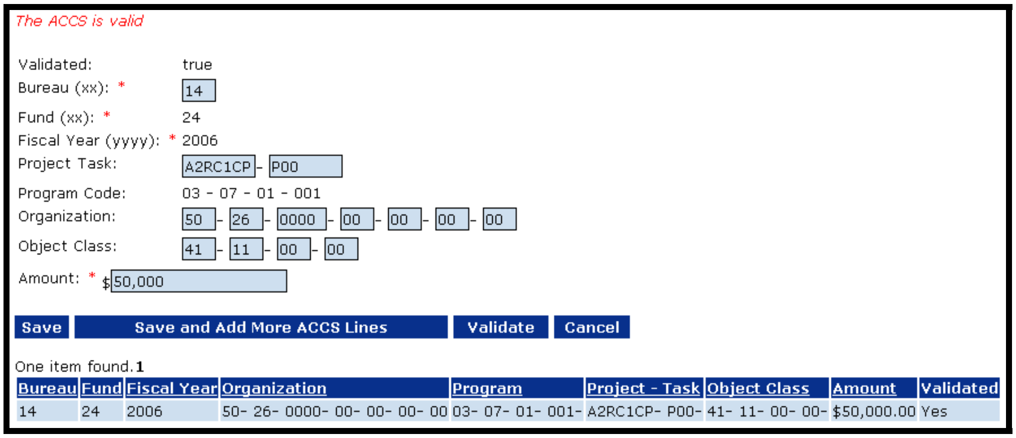
Once all the information has been entered, validate the codes by selecting the ***Validate*** button. Please note that until the codes have been validated, ***False*** will be displayed in the Validated field.



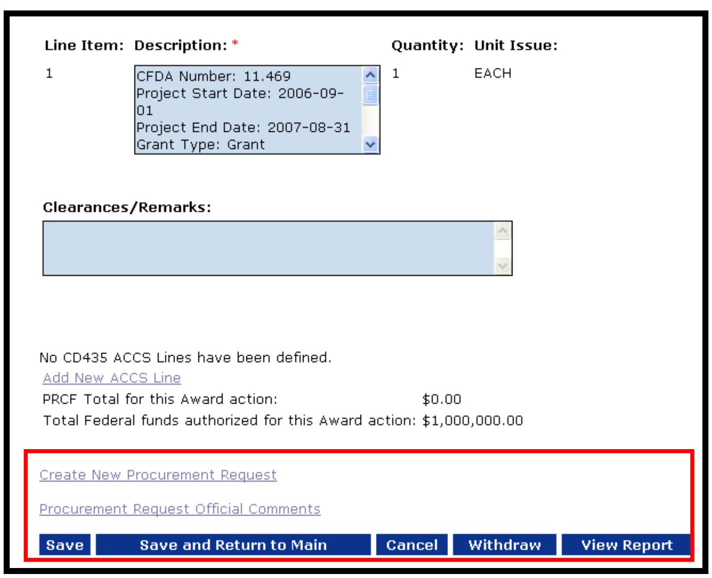
Note: All ACCS Lines must be validated in order for the Request Authorizing Official to have the option to complete the Procurement Request and Commitment of Funds (CD-435).

13. Upon selecting the ***Validate*** button, a message will appear stating the ACCS is valid and ***"yes"*** is displayed in the validated field. If the codes are not valid, a message will appear stating which code did not validate. Please note upon validating the codes, the ***Program Code*** will populate. The total dollar amount of your ACCS lines must equal the ***Total Federal Funds authorized for this Award action***). To add another ACCS line, select the ***Save and Add More ACCS Lines*** button. After you have validated the ACCS lines, select ***Save*** to return to the ***Procurement Request and Commitment of Funds*** screen.

14. Click **Save** to save your information entered and remain on this page OR click **Save and Return to Main** to continue working on the task.

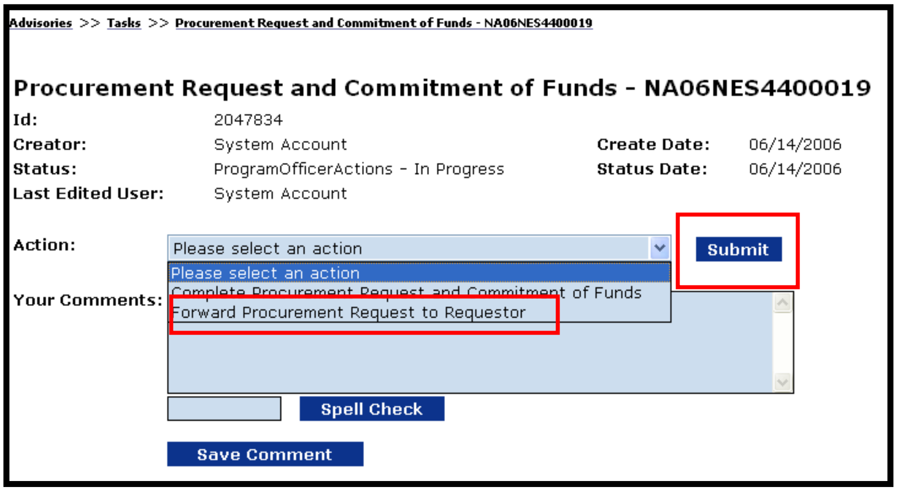


15. To view the CD435 report, select the ***View Report*** button at the bottom of the screen. You may also choose to withdraw this request by selecting the ***Withdraw*** button and create a new Procurement Request and Commitment of funds by selecting the ***Create New Procurement Request*** link. Once all the information has been entered select ***Save*** followed by ***Save and Return to Main***.



Note: You also have the option to withdraw the Procurement Request by selecting the Withdraw button from the bottom of this page. If you withdraw the Procurement Request and new Procurement Request will be generated.

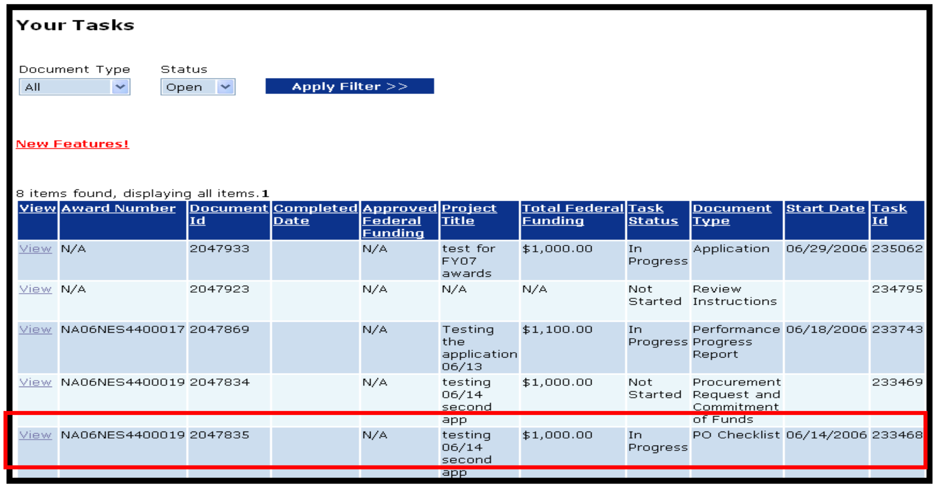
16. After completing and reviewing the Procurement Request and Commitment of Funds (CD-435), you will have the option to forward the document to Requestor. From the action dropdown menu, **select Forward Procurement Request to Requestor**, followed by **Submit**.



Completing the PO Checklist

Once the PO Checklist is complete, a task is immediately sent to your inbox to Certify Revise the Award file. This award file is the repository for the PO Checklist, the NEPA Document and the Procurement Request and Commitment of Funds (CD435). In order to complete the PO Checklist, you will provide information on the following topics.

1. Select the **Inbox** tab.
2. Select the **Tasks** link.
3. Select the **View** link for the **Complete PO Checklist** task.



Your Tasks

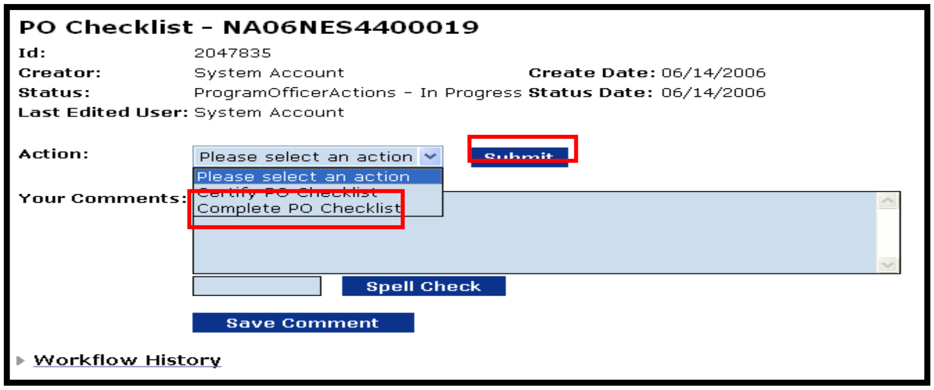
Document Type: All
Status: Open
Apply Filter >>

New Features!

8 items found, displaying all items.1

View	Award Number	Document Id	Completed Date	Approved Federal Funding	Project Title	Total Federal Funding	Task Status	Document Type	Start Date	Task Id
View	N/A	2047933		N/A	test for FY07 awards	$1,000.00	In Progress	Application	06/29/2006	235062
View	N/A	2047923		N/A	N/A	N/A	Not Started	Review Instructions		234795
View	NA06NES4400017	2047869		N/A	Testing the application 06/13	$1,100.00	In Progress	Performance Progress Report	06/18/2006	233743
View	NA06NES4400019	2047834		N/A	testing 06/14 second app	$1,000.00	Not Started	Procurement Request and Commitment of Funds		233469
View	NA06NES4400019	2047835		N/A	testing 06/14 second app	$1,000.00	In Progress	PO Checklist	06/14/2006	233468

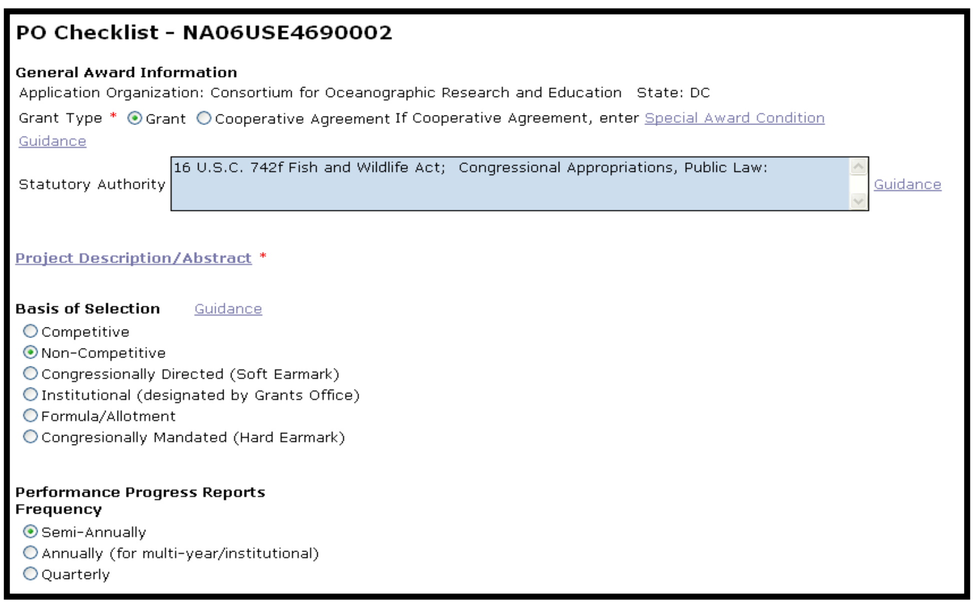
4. Upon selecting the **Complete PO Checklist** task from your inbox, the *Task Launch* page is displayed. From the action drop down menu, you can select from the following options:
   - Certify PO Checklist – This action is selected once all the necessary information has been entered into PO Checklist and the document is complete.
   - Complete PO Checklist – This action will allow you to work on the PO Checklist.
5. Select **Complete PO Checklist**, followed by **Submit**.



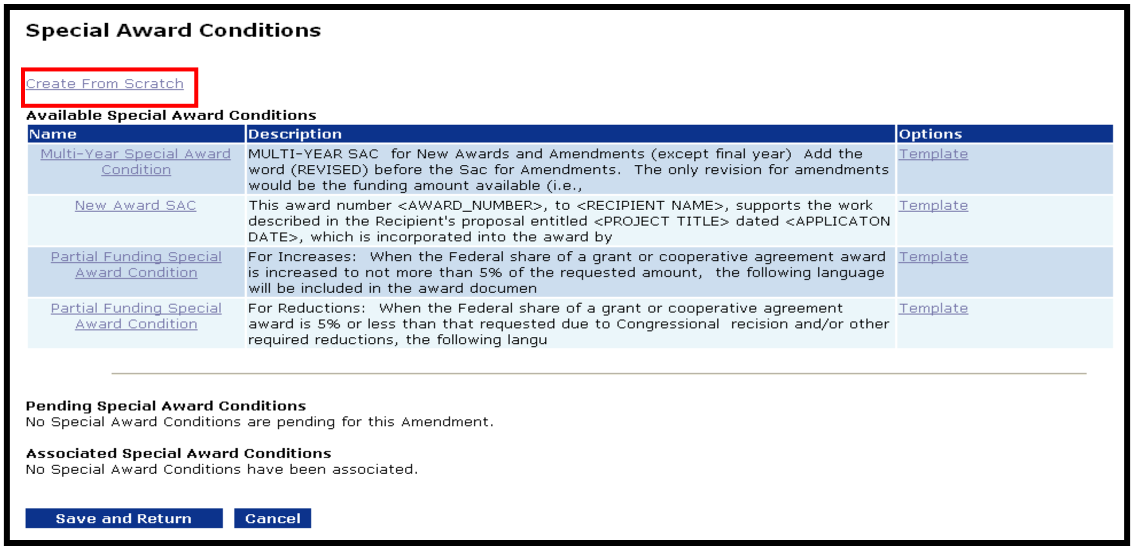
6. Upon selecting **Complete PO Checklist**, the next page displayed is the PO Checklist document to be completed.

7. Select the appropriate radial button for the **Grant Type**.

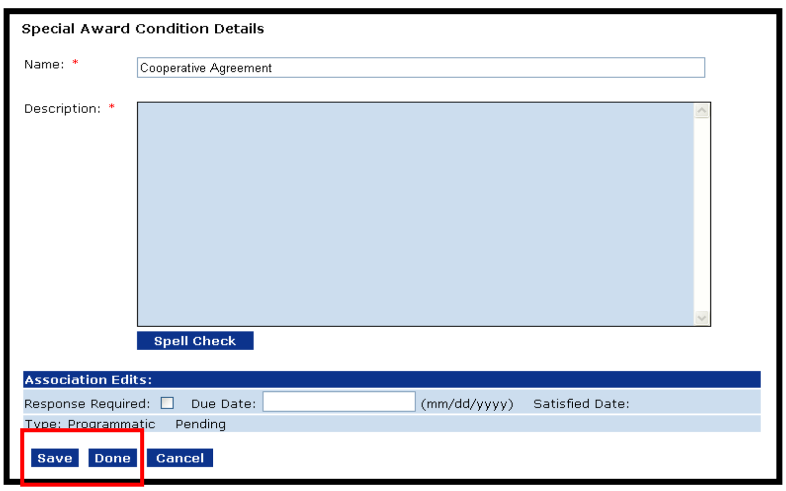
8. If this is a Cooperative Agreement, you must enter Special Award Conditions. Select the **Special Award Condition** link. (If this award does not require Special Award Conditions, proceed to Step 15.)



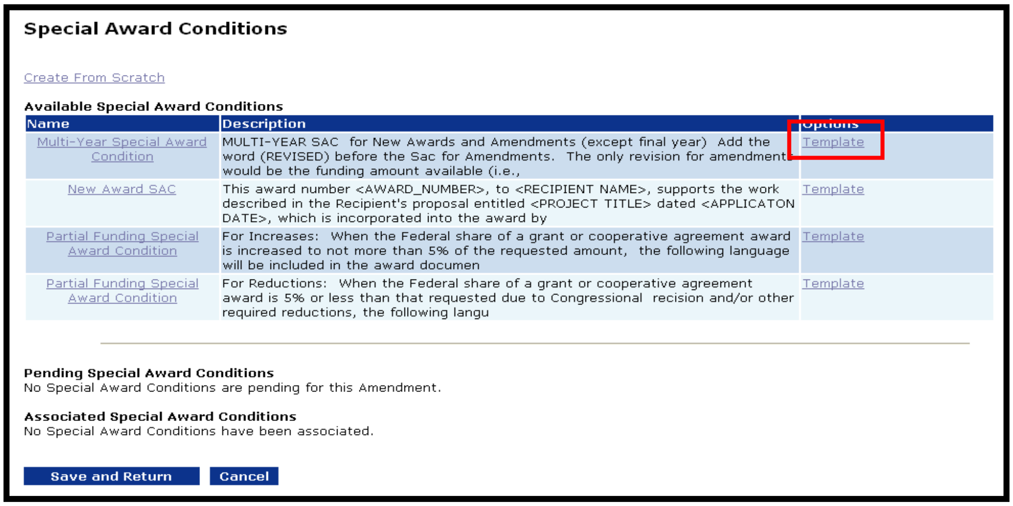
9. You have the option to create a Special Award Condition (SAC) from scratch or select one of the available templates (Proceed to Step 11). If you choose to create a Special Award Condition (SAC) from scratch, select the link titled, "**Create from Scratch.**"



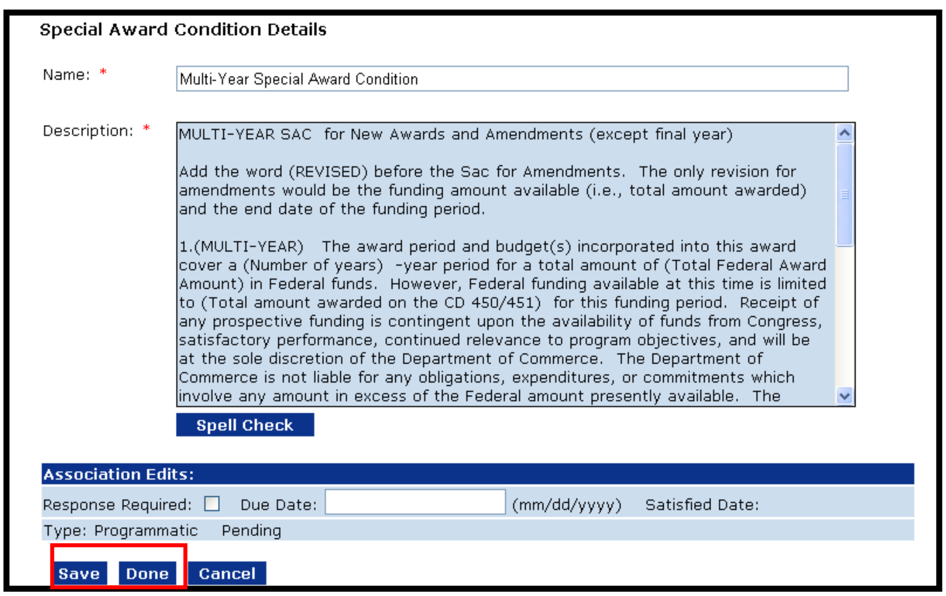
10. Complete the required information marked by a red asterisk mark. Once you have completed entering the required information select **Save**, followed by **Done**.



11. If you choose to create a Special Award Condition (SAC) from an existing template, select the link titled, **Template**, to the left of the template you wish to use.



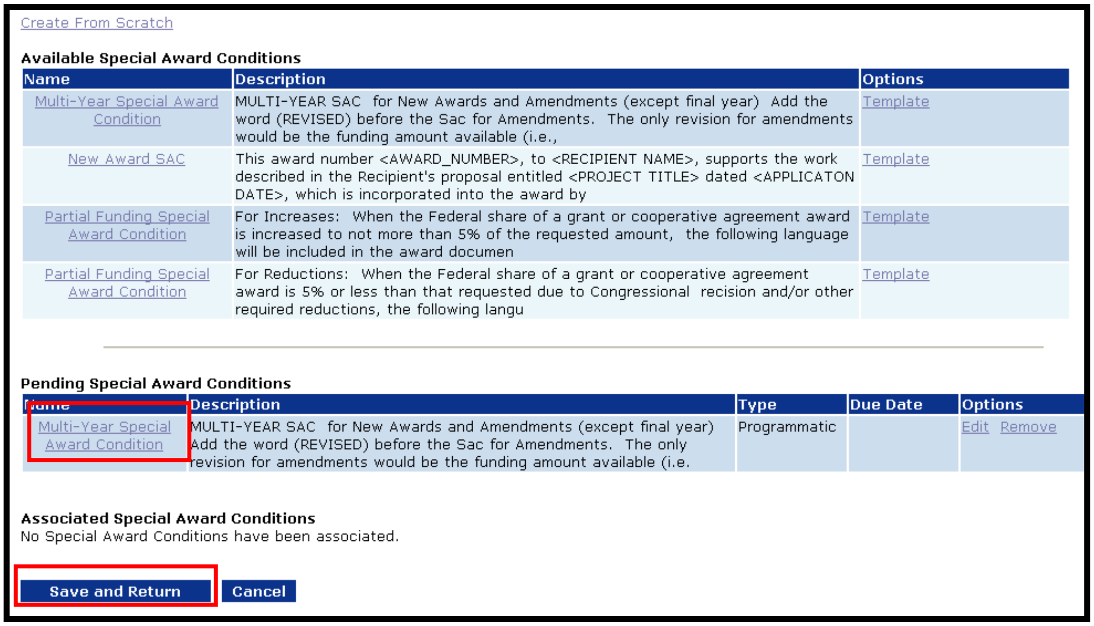
12. Complete the required fields, marked with a red asterisk, by modifying the templates text as desired. Once you have completed modifying the text, select **Save**, followed by **Done**.



13. All Special Award Conditions added can be viewed under the Pending Special Award Conditions section. Click on the name link next to the Special Award Condition to view the text of the document.

14. Select **Save and Return** once you have completed entering all Special Award Conditions (SAC). You will then be prompted back to the PO Checklist to continue completion of the document.

Note: All Special Award Conditions will be listed under the Pending Award Conditions section until the Grants Management Division has approved them.



15. Check Statutory Authority.

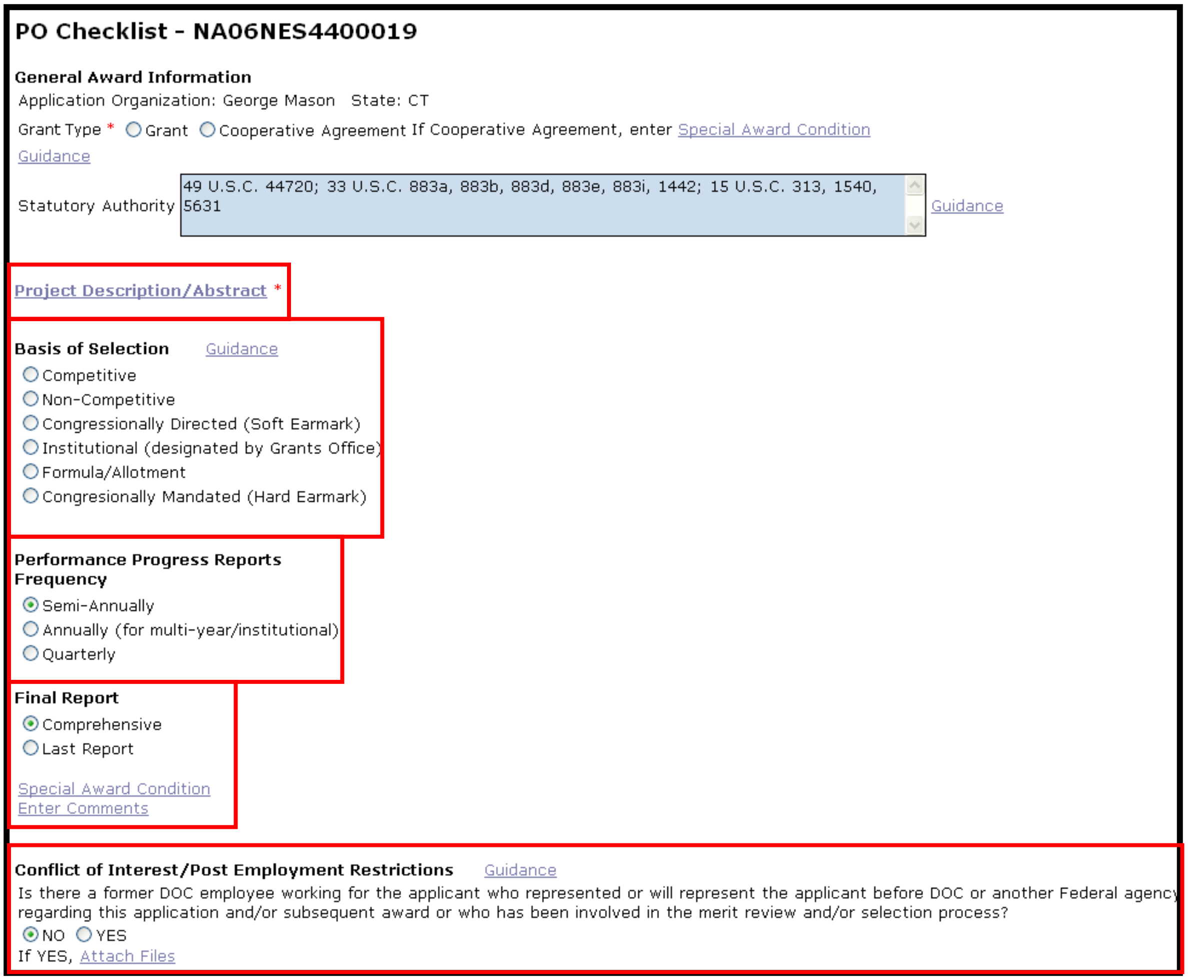
16. Enter the Project Description/Abstract by selecting **the Project Description/Abstract** link.

17. Select Basis of Selection.

18. Select Performance Progress Reports Frequency.

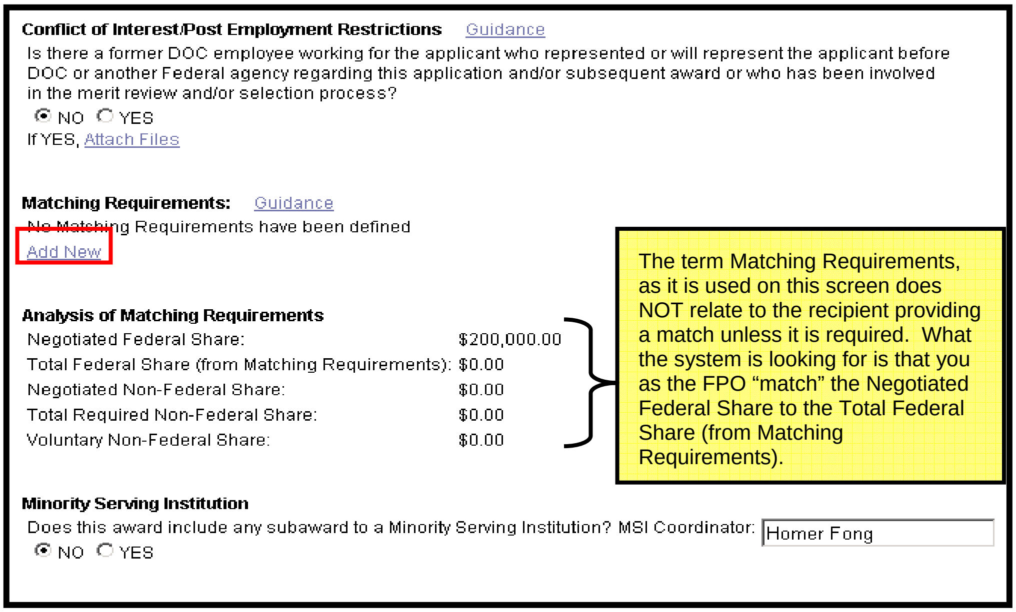
19. Select Final Report type.

20. Review Conflict of Interest/Post Employment Restrictions.



21. Enter Matching Requirements (see description below)

a. Click **Add New**



22. The PO Checklist Matching Requirements screen appears.

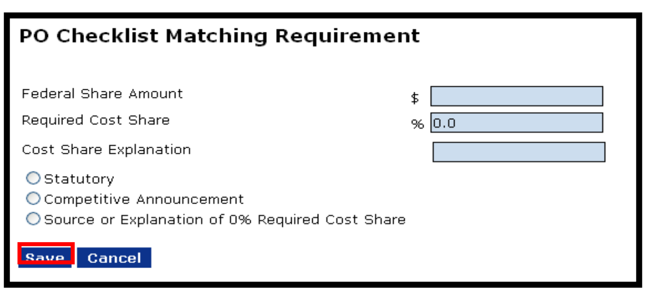
23. Enter Federal Share Amount (You do not need commas (,) or decimal points (.))

24. Enter Required Cost Share, if applicable.

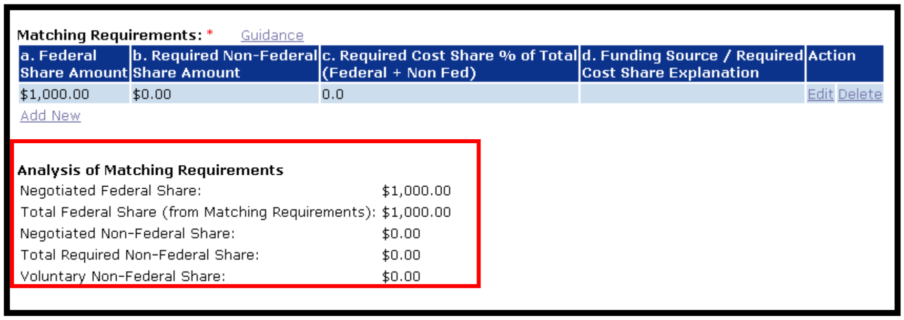
25. Enter Cost Share Explanation, if applicable.

26. Select appropriate radial button.

27. Select **Save**.



28. The funding match analysis is now complete.



Matching Requirements: * Guidance

a. Federal Share Amount	b. Required Non-Federal Share Amount	c. Required Cost Share % of Total (Federal + Non Fed)	d. Funding Source / Required Cost Share Explanation	Action
$1,000.00	$0.00	0.0		Edit Delete

Add New

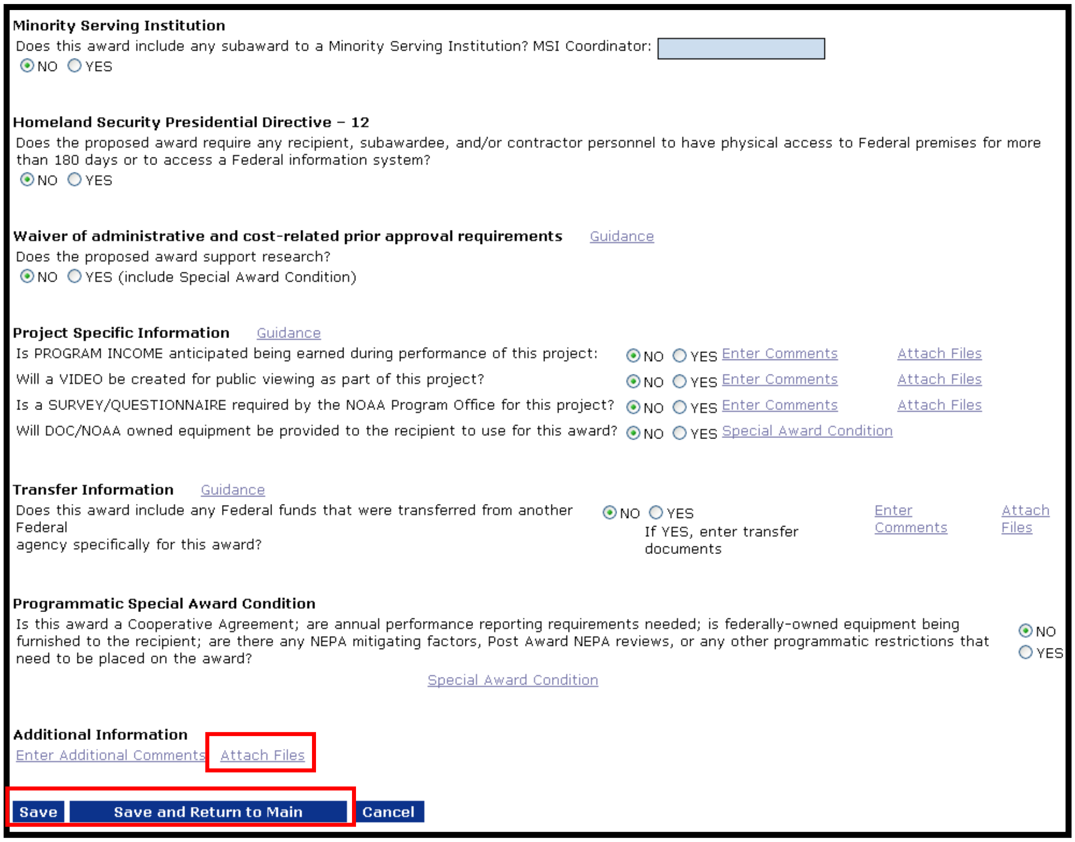
Analysis of Matching Requirements

Negotiated Federal Share:	$1,000.00
Total Federal Share (from Matching Requirements):	$1,000.00
Negotiated Non-Federal Share:	$0.00
Total Required Non-Federal Share:	$0.00
Voluntary Non-Federal Share:	$0.00

29. Continue reviewing the information on the PO Checklist and complete all information that is applicable to this award.

30. Use the **Attach Files** link, if attachments are needed.

31. Select **Save** to capture the information on the page and remain on the page OR select **Save and Return to Main** to capture the information and return to the *PO Checklist* launch page.


Minority Serving Institution
Does this award include any subaward to a Minority Serving Institution? MSI Coordinator:
NO YES

Homeland Security Presidential Directive – 12
Does the proposed award require any recipient, subawardee, and/or contractor personnel to have physical access to Federal premises for more than 180 days or to access a Federal information system?
NO YES

Waiver of administrative and cost-related prior approval requirements Guidance
Does the proposed award support research?
NO YES (include Special Award Condition)

Project Specific Information Guidance
Is PROGRAM INCOME anticipated being earned during performance of this project: NO YES Enter Comments Attach Files
Will a VIDEO be created for public viewing as part of this project? NO YES Enter Comments Attach Files
Is a SURVEY/QUESTIONNAIRE required by the NOAA Program Office for this project? NO YES Enter Comments Attach Files
Will DOC/NOAA owned equipment be provided to the recipient to use for this award? NO YES Special Award Condition

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

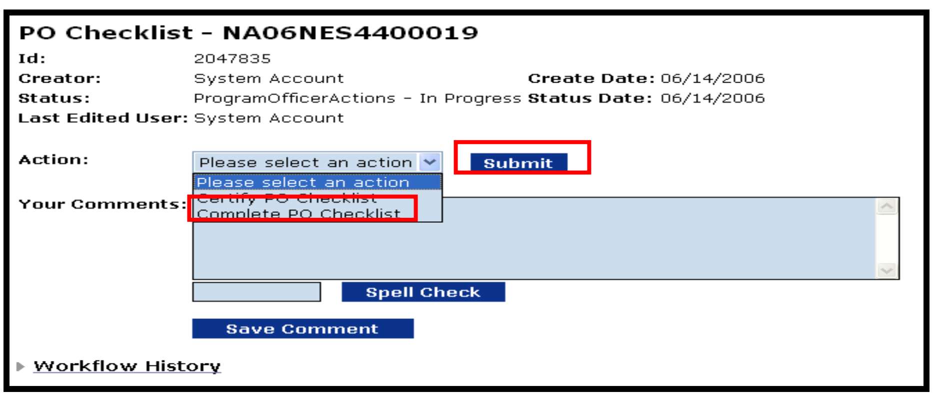
Programmatic Special Award Condition
Is this award a Cooperative Agreement; are annual performance reporting requirements needed; is federally-owned equipment being furnished to the recipient; are there any NEPA mitigating factors, Post Award NEPA reviews, or any other programmatic restrictions that need to be placed on the award? NO YES
Special Award Condition

Additional Information
Enter Additional Comments Attach Files

Save | Save and Return to Main | Cancel

32. Select **Certify PO Checklist** from the action dropdown menu.

33. Select the **Submit** button.


PO Checklist - NA06NES4400019
Id: 2047835
Creator: System Account Create Date: 06/14/2006
Status: ProgramOfficerActions - In Progress Status Date: 06/14/2006
Last Edited User: System Account

Action: Please select an action | Submit
Please select an action
Certify PO Checklist
Complete PO Checklist
Your Comments:

Spell Check
Save Comment

Workflow History

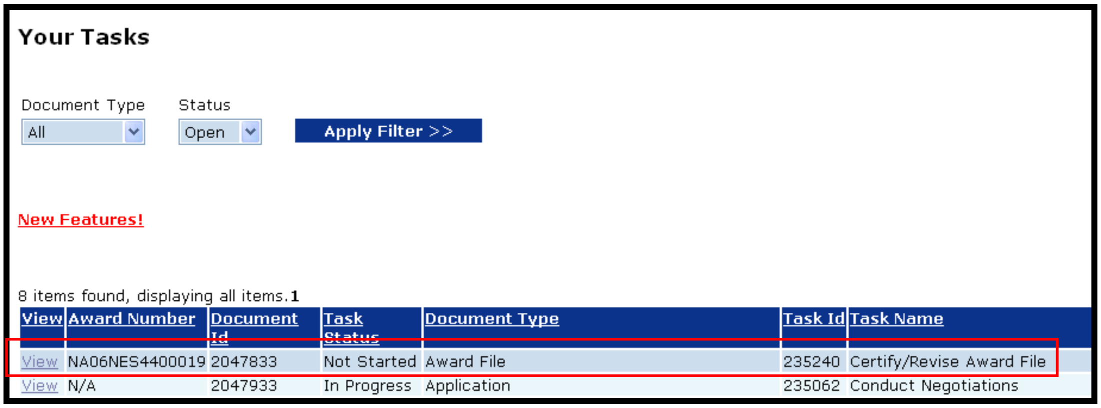
34. Once you select **Submit**, the system prompts you back to your task inbox. The Certify/Revise Award File has been generated.

Award File

The PO Checklist, NEPA Document, and Procurement Request and Commitment of Funds are all housed as part of the Award File. Once the NEPA official, Requestor and Budget Officer sign off on their respective actions, you can forward the Award File to GMD. You can check the status of those documents by viewing the task to Certify/Revise Award File in your inbox.

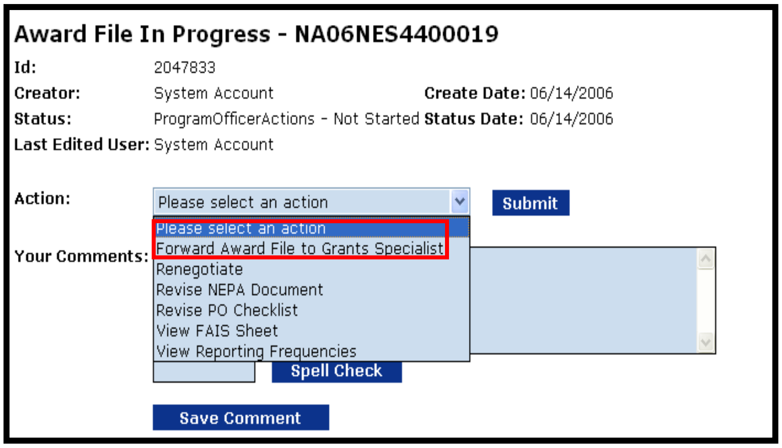
Certify/Revise Award File

1. Select the **Inbox** tab.
2. Select the **Tasks** link.
3. Select the **View** link for the **Certify/Revise Award File** task.



Note: The Certify/Revise Award file is the document that is forwarded to the Grants Management Division once all the selection documents are complete. This task can also be used to renegotiate and make revisions to the documents provided in the action dropdown menu.

4. Upon selecting the **Certify/Revise Award File** task from your inbox, the *Task Launch* page is displayed. From the action dropdown menu, you can select from the following options:
   - Forward Award File to Grants Specialist – Select this action to submit the Award to the Grants Management Division
   - Renegotiate – Select his action to make changes/revisions to the application.
   - Revise NEPA Document – Select this action to make changes/revisions to the NEPA Document.
   - Revise PO Checklist – Select this action to make changes/revisions to the PO Checklist.
   - View FAIS sheet – Select this action to view the FAIS document.
   - View Reporting Frequency - Select this action to view the Reporting Frequency.
5. Select **Forward Award File to Grants Specialist** to complete the award process.



Note: If revisions are needed to the Application, NEPA document, PO Checklist, and/r Procurement Request, please refer to the Renegotiations Quick Reference guide located on the Grants Online Training page.

For more information on any of the Grants Online functionality detailed in this manual, please contact the Grants Online Help Desk at 301-713-1000 or toll free at 1-877-662-2478.