Grants Online Training for EDA Grantees

January 2016

WHY GRANTS ONLINE?

- Speeds EDA processing of awards via automatic download of applications and population of data from Grants.gov

- Enables access to grant files – anywhere, anytime via the internet for both EDA and grantees

- Fully electronic system eliminates need for paper files

ACCEPTING AN EDA AWARD

1. Notification will come via email to the Authorized Organizational Representative (AOR)

2. The AOR should call or email the Grants Online Helpdesk to get a username and password

❖ Once the award is accepted, the AOR will have the ability to designate other users for their organization

From: GrantsOnLine.test@noaa.gov (GrantsOnLine.test@noaa.gov)
To: grant.recipient@yahoo.com
Date: Friday, December 23, 2015 4:37:19 PM
Cc: federal.program.officer@eda.gov
Subject: Notification of EDA Award - ED16ATL3020084

Congratulations, you are the recipient of EDA Award Number ED16ATL3020084.

Workflow Comments: None

This award approved by the Grants Officer constitutes an obligation of Federal funding. By electronically signing, the Recipient agrees to comply with the Award provisions checked on the award document. If not electronically signed without modification by the Recipient within 30 days of receipt, the Grants Officer may unilaterally terminate this Award. The EDA Grants Online web site can be accessed at: https://grantsonline.rdc.noaa.gov.

Name of Recipient Authorized Representative with task to accept award: Jane Smith. Although the offer of award is made to this person, any Authorized Representative in your organization can reassign the task to "Accept" this award through "Task Management" under the "Inbox".

Additional Information about your award is given below:

    CFDA Number: 11.302
    Award File Period: 01/01/2016 - 12/31/2018
    Program Office: Atlanta Planning Program Office (ATRO-PL)
    Program Officer: Kerstin Millius
    Phone: 301-555-1212
    Email: testemail@msg2.rdc.noaa.gov
    Total Federal Funding: $60,000.00
    Total Non Federal Funding: $60,000.00
    Organization Name: An Economic Development District
    Project Title: A Sample Project
    Name of Principal Investigator/Project Director (PI/PD) as identified in the negotiated
    application: None Identified

After award acceptance, the PI/PD(s) must be associated with this award by your Recipient System Administrator. This will provide them with access to the award for requesting award actions and submitting project progress reports. The Recipient System Administrator that you identify during acceptance will receive a task to "Manage Award Users".

Your Username is your first initial followed by your last name (and possibly followed by a 2-digit number). If you do not have your Password or need to create an account, please email the Grants

- https://grantsonline.rdc.noaa.gov/flows/home/Login/LoginController.jpf

- System Requirements: Internet Access and a Browser

- Don't try to log in more than twice before clicking "Forgot your password" or your account will lock.

- Don't use your browser's back button while in the system
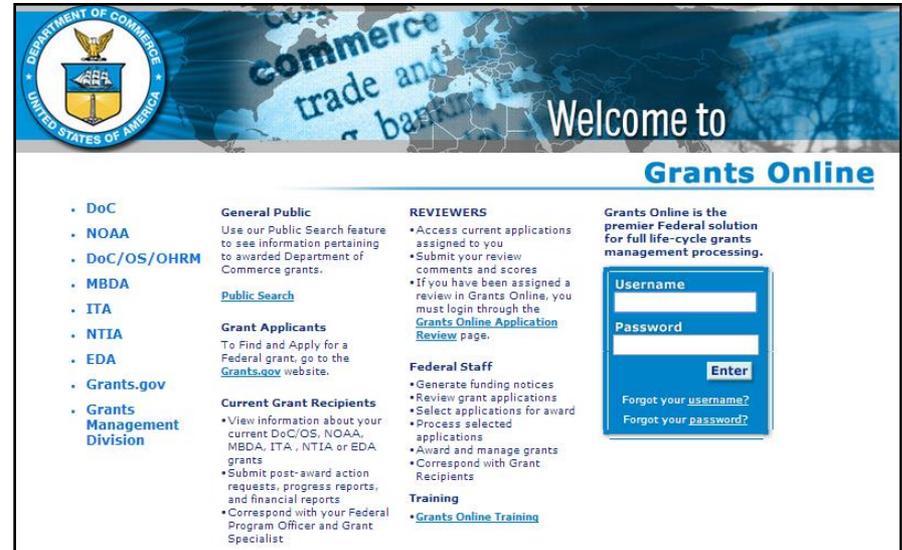
1. Click on the "Tasks" option under the "Inbox" tab

2. Click "View" next to the "Accept/Decline Award" task

3. From the "Action" Dropdown Box, choose "View Award Details" and click "Submit"

4. The Award Details Page Contains links to Award Terms and Conditions

5. From the Action dropdown box on the main page, choose "Accept Award" and click "Submit"

6. The system will not consider the award "accepted" until a "Recipient Administrator" is designated on the next screen

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Designated "Recipient Administrators" have the power to manage users for their organization, including adding/changing user roles and permissions in the system.

- For your first award, the system will default to making the Authorized Representative an Administrator for your organization.

- If this is acceptable, just click "Save."

Option1

Accept Award
Organization : An Economic Development District

Recipient Administrator Information
Name Arthur Rep48
Email testemail@msg2.rdc.noaa
Phone 303-555-1212
Add/Change Recipient Administrator

Please use the link above to add/change the Recipient Administrator for this Award.

Save Cancel

Option 2

1. If the AOR will not be the Administrator, then click "Add/Change Recipient Administrator"

Accept Award
Organization : An Economic Development District

Recipient Administrator Information
Name Arthur Rep48
Email testemail@msg2.rdc.noaa.
Phone 202-555-1212

Add/Change Recipient Administrator

Please use the link above to add/change the Recipient Administrator for this Award.

Save **Cancel**

2. If the your designated Administrator does not already have a Grants Online account, then click "Add a new User"

Recipient Search

Last Name : _____ First Name :
Click "Search" with name fields blank to display all available users."
Search for users in all of my organizations: ☐

Search **Cancel**

Search Results Nothing found to display.

Add a new User

3. Fill out the form to create a new user for your organization

Create Recipient User
For Organization: EDA - 2002608 - An Economic Development District

User Profile
Prefix : [None ▾]
First Name : * _____
Middle Name: _____
Last Name : * _____
Suffix : [None ▾]

User Account Details
User Name :* _____
Username will be generated on save.

User Role : [Recipient User ▾]

Address :
Title : _____
Street : _____
City : _____
State : [Please select a state ▾]
Zip : _____ Coun
Email :* _____
Alternate Email : _____
Phone :* _____ Exte
Alternate Phone : _____ Exte
Fax : _____

Save **Cancel**

1

| Inbox | Awards | Account Management | Help |

Welcome to Grants Online Mr. Lee Page. You are logged in to TEST1.

- **Manage Recipient Users**
- **Organization Profile Change Request**
- **SF-425A for Multiple Awards**
- **Search Awards**
- **Search Reports**

Advisories >> Search Awards >> Grants File - MB15OBI

Awards

- **Manage Recipient Users** -

The Manage Recipient Users feature allows yo
within your organization. You can also add ne
Key Personnel may require an Approved Awar

- **Organization Profile Change Request** -

View organization profile and submit request f

- **SF-425A for Multiple Awards** -

2

Select Organization

Please select an organization to manage:

MBDA - 2002879 - LEPAGE BAKERIES, INC ▼

Select **Cancel**

Manage Recipients

Please select an organization to display:

MBDA - 2002879 - LEPAGE BAKERIES, INC ▼

Individuals that belong to LEPAGE BAKERIES, INC:

9 items found, displaying all items.1

Name (Last, First)	Organization	Phone	Action	Has a Recipient Role	Disassociated Date	User Name
Boy, Tom	MBDA - 2002879 - LEPAGE BAKERIES, INC	1231231234	Manage Award Access Edit Profile	Y	N/A	tboy
Coltrane, John	MBDA - 2002879 - LEPAGE BAKERIES, INC	123-456-7890	Manage Award Access Edit Profile	Y	N/A	jcoltrane
Dean, paula	MBDA - 2002879 - LEPAGE BAKERIES, INC	2223331100	Manage Award Access Edit Profile	Y	N/A	pdean01
Gayy, Marvin	MBDA - 2002879 - LEPAGE BAKERIES, INC	5125125525	Manage Award Access Edit Profile	Y	N/A	mgayy
Khan, Jenny	MBDA - 2002879 - LEPAGE BAKERIES, INC	3013013300	Manage Award Access Edit Profile	Y	N/A	jkhan01
Lin, Boe	MBDA - 2002879 - LEPAGE BAKERIES, INC	678-963-0321	Manage Award Access Edit Profile	Y	N/A	blin
Mack, Big	MBDA - 2002879 - LEPAGE BAKERIES, INC	6156150562	Manage Award Access Edit Profile	Y	N/A	bmack
Page, Lee	MBDA - 2002879 - LEPAGE BAKERIES, INC	3013013000	Manage Award Access Edit Profile	Y	N/A	lpage
Rollins, Sonny	MBDA - 2002879 - LEPAGE BAKERIES, INC	3013010030	Manage Award Access Edit Profile	Y	N/A	srollins

3

If a single user has multiple accounts, you may contact the Grants Online Help Desk to have them merged into one account. Click

Add another user

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Manage Recipient - Mr. Lee Page

You are viewing the current access levels and roles for **Mr. Lee Page** on all awards that belong to **LEPAGE BAKERIES, INC.**

Please use the checkboxes found below to add or restrict access.

☑ Check to add **Mr. Lee Page** as the **Recipient Authorized Representative**

☑ Check to add **Mr. Lee Page** as the **Administrator**

Mr. Lee Page is:

- ⦿ Not a Business/Financial Representative
- ○ A Business/Financial Representative
- ○ A Business/Financial Representative with authority to submit Federal Financial Reports directly to the Federal Agency without routing through the Recipient Authorized Representative

Please note that by checking the above boxes this user will become the Recipient Administrator, Recipient Authorized Representative, or Business/Financial Representative for all Awards. Unchecking these boxes will remove the user from the respective role for all Awards.

A Principal Investigator/Project Director (PI/PD) submits Project Progress Reports through the Authorized Representative. A Principal Investigator/Project Director (PI/PD) - Submitting has the option to submit Project Progress Reports directly to the Federal Agency without going through the Recipient Authorized Representative.

11 items found, displaying all items.**1**

Award	Award Title	PI/PD	PI/PD - Submitting	Not a PI/PD	Key Personnel
MB13OBD8050015	OM-123 for R4.11	○	○	⦿	☐
MB13OBD8050020	test -- notification [survey]	○	○	⦿	☐
MB13OBD8050024	TEST- GOL- 13	○	○	⦿	☐
MB14OBD8000029	Test	○	○	⦿	☐
MB14OBD8000030	TEST APPS - Closeout	○	○	⦿	☐
MB14OBD8000031	GOL-123 Testing	○	○	⦿	☐
MB14OBD8000032	TEST GOL-123 Non-NOAA NON-ASAP Money left to de-ob	○	○	⦿	☐
MB14OBD8000035	TEST Apps - for Sikha -- non-asap money left to de-ob closeout	○	○	⦿	☐
MB14OBD8000037	TEST non-interfaced non-asap decline award -closeout	○	○	⦿	☐
MB15OBD8000045	test asap drawdown	⦿	○	○	☐
NA13NOS4780136	TEST AWARD 1 -- SAC included	○	○	⦿	☐

Note: If you uncheck a box, the system will restrict access. If you choose to disassociate this user they will be removed from all awards under LEPAGE BAKERIES, INC.

Assign **Cancel**

Disassociate User

Please note that this will remove **all** roles and access to awards that this user holds in this Organization!

You may need to submit and get approval on a **Change in Key Personnel Award Action Request** before you take this action.

The Next Day…

LOCATING AWARD FILES WHEN NO "TASKS" ARE ASSIGNED

1. Click on "Awards" tab.

2. Click on "Search Awards" on the left menu.

3. Click on the "Search" button. (Will bring up all awards for your organization in the Grants Online system.)

4. Click on desired Award Number. This will bring you to the "Grants File" page for that award.

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Grants File - ED16ATL3020048

Id: 2279802
Status: Accepted

Action: [Please select an action ▼] **Submit**
Your Comments:

[   ] **Spell Check**

Save Comment

📁 **Attachments:**

Grant Information

CFDA Number:	11.302	**Award Period:**	10/01/2014 - 10/27/2018	**Program Office:**	Planning ATL (PL-ATRO)
Program Officer:	Grants Student35	**Program Officer Phone:**	202-555-1212	**Program Officer Email:**	testemail@msg2.rdc.noaa.gov
Total Federal Funding:	$50,000.00	**Total Non Federal Funding:**	$50,000.00	**Multi-Year:**	Yes
Organization Name:	An Economic Development District	**ASAP Recipient:**	No	**High Risk Recipient:**	No
SF-425 Frequency:	Quarterly Full Report	**Progress Report Frequency:**	Synchronized to Financial Reports	**Final Progress Report:**	Comprehensive - a last interim report is not required
Final Reports Due On:	01/25/2019	**Project Title:**	Atlanta Student 35		
PIs - PDs:	None Designated			**Closeout Date:**	N/A
NON-INTERFACED					

Sub Documents

Type	ID	Title	Status
Award Package	2279897	Atlanta Student 35	Accepted
Special Award Condition Report	2279897	Special Award Condition Report	
Award File 0	2279803	Atlanta Student 35	Accepted

Export options: Excel

Associated Documents

Type	ID	Title	Status
Award Action Request	2280016	No Cost Extension - Prior Approval Required	ProgramOfficerActions - Complete

Post Award Management

PROGRESS REPORTS

1. First, search for your award in Grants Online

2. On the "Grants File" page, scroll down to the Progress Report Section, and click on the ID number of the Progress Report for the period you are reporting on

3. Click through to the "details page"

Progress Reports

Type	ID	Period Start	Period End	Due Date	Status
Performance Progress Report	2279181	10/01/2014	03/31/2015	04/30/2015	Submitted
Performance Progress Report	2279182	04/01/2015	09/30/2015	10/30/2015	Not Delinquent

Export options: Excel
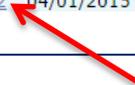
Performance Progress Report - ED16ATL3020011

Id: 2279182
Status: Not Delinquent

Go to Performance Progress Report Details Page >>

This document currently has no tasks assigned to you.

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4. Complete the Progress Report Form. Be sure to click "Save" before adding any attachments.

5. Add any attachments (i.e. a word or pdf document with your complete report), using the small "+" sign.
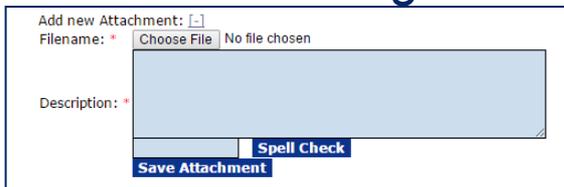
6. Click "Save and Start Workflow" – this will bring you back to the main report page.

Performance Progress Report - ED16ATL3020011

📁 **Attachments:**

No attachments.

Click to add attachment

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

Use the "Add new Attachment: [+]" link to attach the report.

Clarifying comments:

Spell Check

Reporting Period *	Due Date	Final Report
04/01/2015-09/30/2015	10/30/2015	○ Yes ● No

Recipient Principal Investigators/Project Directors:
Nothing found to display. Submitting?

Recipient Authorized Representatives:
One item found.1

Name	Telephone
Rep38, Arthur	303-555-1212

Submitted On:

Accepted On: N/A

Save **Save and Start Workflow** Cancel

Add new Attachment: [-]
Filename: * Choose File No file chosen

Description: *

Spell Check
Save Attachment

7. In the action box, you should have an option to either "Forward Progress Report to Agency" or to forward the report to an AOR if you do not have submitting powers.

❖ Any comments entered into the comment box will also be transmitted to EDA when you click "Submit."

Post Award Management

FINANCIAL REPORTS

1. Search for your award in Grants Online

2. On the "Grants File" page, scroll down to the Financial Report Section, and click on the ID number of the Financial Report for the period you are reporting on

3. Click through to the "details page"

Financial Reports

Type	ID	Period Start	Period End	Due Date	Status	Amount Requested
SF-425: Federal Financial Report - Full Report	2279180		03/31/2015	04/30/2015	Submitted	N/A
SF-425: Federal Financial Report - Full Report	2279475		09/30/2015	10/30/2015	Not Delinquent	N/A

Export options: Excel

SF-425: Federal Financial Report - Full Report - ED16ATL3020011

Id: 2279475
Status: Not Delinquent
Go to SF-425: Federal Financial Report - Full Report Details Page >>

This document currently has no tasks assigned to you.

4. Complete the Financial Report Form.

5. Links on the report will pre-populate some information for you

6. Red starred fields are required – if a field does not have a red star and is not relevant to your EDA award (i.e. program income), leave it blank, rather than add a zero. This will reduce the likelihood of "errors" when the system checks your form

7. Once the form is complete, click "Save and Start Workflow" – this will bring you back to the main report page.

8. In the action box, you should have an option to either "Forward SF-425 Full Report to Agency" or to forward the report to an AOR if you do not have submitting powers.

❖ Any comments entered into the comment box will also be transmitted to EDA when you click "Submit."

Post Award Management

AWARD ACTION REQUESTS

- Generally, anything that requires *prior approval* from EDA, should be submitted via an award action request in Grants Online.

- Because all EDA awards are set to "Agency Review" in ASAP, this also includes an ASAP Drawdown Request for ASAP recipients.

- Before initiating an Award Action Request, it is recommended you contact EDA for specific guidance regarding your particular request.

Award Action Request Index - ED15HDQ3130020

* No Cost Extension - Prior Approval Required	No Cost Extension - Prior Approval Waived (Research Terms and Conditions)
Extension to Close Out	Reprogram or Rebudget
* Change in Scope	Equipment Purchase
* Transfer of Award	Foreign Travel
Change in Principal Investigator/Project Director	Sole Source Contract
Change in Key Person Specified in the Application	Absence of more than 3 months or 25% by project director or PI
Satisfied Special Award Conditions	Inclusion of cost that require prior approval based on cost principles
Transfer of funds allotted for training to other categories of expenses	* Sub award, transfer or contracting out of any work under the award if not described in the approved application
Pre-Award Cost	* Termination for Convenience
Submit Additional Closeout Documents	ASAP Drawdown Request
Other	

1. Search for your award in Grants Online

2. On the "Grants File" page, choose "Create Award Action Request from the "Action" dropdown and click "Submit."

3. On the next page (Award Action Request Index Page), select the type of Award Action Request you would like to submit.

Grants File - ED15HDQ3130020

Id: 2277136
Status: Accepted

Action: Please select an action ▼ **Submit**
Your Comments:
Please select an action
Create Award Action Request
View Accounting Details
View/Manage Award-related Personnel

Spell Check

Save Comment

Award Action Request Index - ED15HDQ3130020

* No Cost Extension - Prior Approval Required
Extension to Close Out
* Change in Scope
* Transfer of Award
Change in Principal Investigator/Project Director
Change in Key Person Specified in the Application
Satisfied Special Award Conditions
Transfer of funds allotted for training to other categories of expenses
Pre-Award Cost
Submit Additional Closeout Documents
Other

SUBMITTING AWARD ACTION REQUESTS

4. Complete the form on the next page, and click save. This will enable an option for attachments.

5. Once you have attached any required supporting documentation, click "Save and Start Workflow" at the bottom of the page – this will bring you back to the main Award Action Request page.

6. In the action box, you should have an option to either "Forward to Agency" or to forward to an AOR if you do not have submitting powers.

❖ Any comments entered into the comment box will also be transmitted to EDA when you click "Submit."

1. Follow the steps to create an Award Action Request and choose "ASAP Drawdown Request" from the Index page.

2. Complete the ASAP Drawdown Request form and click "Save."

3. If an SF-270 is required for your award, attach it using the attachments feature before clicking "Save and Start Workflow" – this will bring you back to the main Award Action Request page.

4. In the action box, you should have an option to either "Forward to Agency" or to forward to an AOR if you do not have submitting powers.

ASAP Drawdown Request - ED15HDQ3130020

📁 **Attachments:**

No attachments.

Add new Attachment: [+]
Any changes to information on this page should be saved before adding or removing attachments. File name should be 50 characters or less
Large File Guidance

ASAP Drawdown Request
Guidance

Requested Drawdown Date*	01/02/2016
Requested Amount*	$5,000.00
Period Covered by this Request*	From 11/01/2015 To 11/30/2015
Total Expenditures to Date*	$5,000.00
Total Federal Funds Previously Requested*	$0.00
Justification	

Spell Check

Award Action Request Report

Save | **Save and Start Workflow** | Cancel
Note: Starting workflow will take a minute. You will have the first task.

Award Action Request - ED15HDQ3130020

Id: 2281273
Status: RecipientAuthorizedRepresentativeActions - Not Started

Action: Please select an action ▼ **Submit**
Your Comments: Please select an action
Forward To Agency
View/Edit Award Action Request details
Withdraw Award Action Request

Spell Check

Save Comment

FOR MORE INFORMATION

- Grants Online Website:
  - https://grantsonline.rdc.noaa.gov/flows/home/Login/LoginController.jpf

- Grants Online Quick Reference Guide for Grantees:
  - http://www.corporateservices.noaa.gov/grantsonline/Documents/Quick%20Reference%20Guides/GrantRecipients_Quick_Ref_Guide.pdf

- Other Grants Online Training Materials and Information:
  - http://www.corporateservices.noaa.gov/grantsonline/gol_training_GRANTEE.htm

E·D·A
U.S. ECONOMIC DEVELOPMENT ADMINISTRATION

Email: GrantsOnline.HelpDesk@NOAA.GOV

Phone: (301) 444-2112 or (877) 662-2478 (toll-free)

Help Desk Hours:

Monday – Friday, 8am-6pm (Eastern Time)

QUESTIONS?