# Grants Online
## Grant Recipient's Quick Reference Guide

Grants Online is the Department of Commerce's grant processing and administration system. The web-based system interfaces directly with Grants.gov and requires a unique username and password to access. Grant Recipients should contact their organization's Recipient Administrator to obtain log in credentials. With access to Grants Online, a recipient can complete tasks as defined in the Grant Recipient User Roles – Functionality table.

- Accept awards electronically
- Manage Award user accounts for individuals within the organization
- Submit Award Action Requests (AARs)
- Submit Federal Financial Reports (FFRs)
- Submit Performance Progress Reports (PPRs) or Research Performance Progress Reports (RPPRs)

The Grants Online URL is:  https://grantsonline.rdc.noaa.gov

This Quick Reference Guide is an abbreviated version of the Grant Recipients' User Manual. For a comprehensive explanation (step-by-step instructions accompanied by screen shots) for the Grant Recipient's tasks, reference the Grant Recipient User Manual (the second link under item #1). Using the Table of Contents of the Grant Recipient User Manual click the topic you are interested in exploring. That takes you to the section of the document dedicated to the topic of interest.
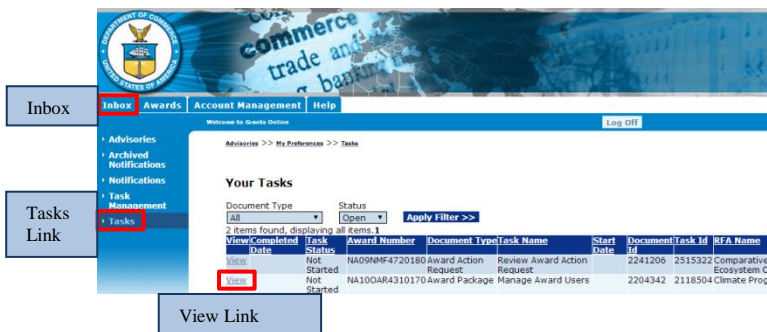
## Process an Inbox Task

Grants Online is a workflow system that sends a task to a user's Inbox for each action the user should complete. The actions a user can perform are dependent upon the information in his/her user profile (organization and roles). The steps below explain how to access and complete tasks in the user's Inbox.
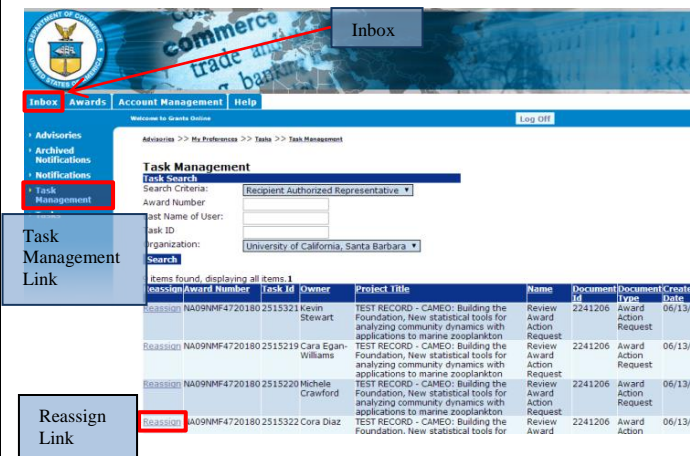


1. Click the **Inbox** tab.
2. Click the **Tasks** link.
3. Locate the task you wish to complete and click the **View** link beside that task.
4. The launch page for the selected task is visible. Select an item from the Action dropdown menu.
5. Click the **Submit** button.
6. Perform the remaining steps associated with completion of the selected task.

## Reassign a Task

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

The user can also search for open tasks in his/her organization by completing steps 1-5 in this section of the document.



1. Click the **Inbox** tab.
2. Click the **Task Management** link.
3. While on the Task Management launch page, select the appropriate role from the Search Criteria dropdown list. The selection defaults to the user's main role.
4. Select the appropriate organization from the second dropdown menu.
5. Click the **Search** button, under the Task Management header.
6. When search results display, click the **Reassign** link next to the task that is to be reassigned.
7. From the Search Users page specify the last name of the user to whom the task will be reassigned. If the search is conducted using a common last name, also specify the first name; that limits the number of records returned by the search.
8. Click the **Search** button.
9. Click the **Select** link next to the name of the user to whom the task should be reassigned.
10. Click the **Yes** button to confirm the request or the **No** button to cancel the request.

## Accept an Award
**Recipient Authorized Representative (RAR) Only**
1. Click the **Inbox** tab.
2. Click the **Tasks** link.
3. Click the **View** link beside the Accept/Decline Award task.

4. When the RAR views the options on the Action dropdown menu, Accept Award or Decline Award is not available. Those options will not be available until the RAR verifies the accuracy of the Award conditions.
5. Click the **View Award Details** option from the Action dropdown menu.
6. When finished viewing the Award Details click the **Cancel** button at the bottom of the screen.
7. Upon returning to the previous screen, the user has two additional options on the Action dropdown menu: Accept Award and Decline Award.
8. To accept the Award:
   a. Select **Accept Award** from the dropdown menu and click the **Submit** button. The Accept Award page is displayed.
   b. On the Accept Award page, scroll to the bottom of the page and verify the Recipient Administrator Information.
   c. To update the Recipient Administrator Information, click the **Add/Change Recipient Administrator** link.
   d. If the Recipient Administrator Information cannot be updated, contact the Grants Online Help Desk.
   e. Click the **Save** button located at the bottom of the page.

Accept Award

Organization : University of Florida

Recipient Administrator Information
Name
Email   test@aa.com
Phone
Add/Change Recipient Administrator
Please use the link above to add/change the Recipient A

Save   Cancel

**NOTE:** The Recipient Administrator indicated will receive the Manage Award Users task. This task allows the Administrator to assign or add users to the award.

**Manage Award Users**
**Recipient Administrator ONLY**
1. Click the **View** link beside the Manage Award Users task.
2. While on the Award Package launch page, select **View Manage Award Screen** from the Action dropdown menu. Click the **Submit** button.
3. Steps 4-12 will be completed to add a user for each role. The example below focuses on adding a Principal Investigator / Project Director. **NOTE:** The next step will vary depending on the role you are assigning.
4. On the screen, click the **Add Another Principal Investigator - Project Director** link to identify the relevant Principal Investigator (PI) or Project Director (PD) for this award.
5. On the Recipient Search screen, locate the person you would like to assign as PI/PD for this award. If the search returns several names, click the **Select** link in the Action column to indicate the person who should be assigned to the role.
6. If the PI's or PD's name is not returned from the search, click the **Add a New User** link to establish a new Grants Online user.
7. If adding a new user, specify data for all mandatory (**\***) data elements.
8. Click the **Save** button**.**
9. When the Recipient Administrator adds a Grants Online user and specifies the new user's role, that person is available for assignment to an award. Please be certain **to provide the new user with his/her username and temporary password.**
10. When finished identifying the PI or PD (or other role), click the **Award Package** – **{Award Number}** breadcrumb to return to the launch page.

Advisories >> Award Package - MB15OBD8050017 >> Tasks >> Manage Recipient Users

11. When finished assigning user roles, from the dropdown menu on the Award Package launch page, select **Manage Award Complete**.
12. Click the **Submit** button.

## Print an Award Acceptance Letter

1. Click the **Awards** tab.
2. Click the **Search Awards** link. The Search for Awards launch page is visible.
3. Select Award Status = Open or input the Award Number and click the **Search** button. When the search results are returned, click the **Award Number** next to the appropriate award.

   **NOTE:** The user can leave the search criteria blank to view all awards accessible by the user or enter the Award Number to limit the search results returned.

4. The Grants File launch page is displayed. Scroll down to the Sub-Documents section and click the **ID** link beside the Award Package.
5. The Award Package page is visible. Click the **Go to Award Package Detail Page** link.
6. At the bottom of the page, locate and click the **CD-450 Report** button. The Financial Assistance Award document downloads to the user's computer as a PDF File. The user may view and/or print the file.

## Create & Submit an Award Action Request (AAR)

1. Click the **Awards** tab.
2. Click the **Search Awards** link. The Search Awards launch page is visible.
3. Input the Award Number and click the **Search** button. When the search results are returned, click the **Award Number** for which an AAR will be created.
4. On the Grants File launch page, select **Create Award Action Request** from the Action dropdown menu. Click the **Submit** button.
5. The Award Action Request Index page, with the available AARs, is visible. Click the link that corresponds to the appropriate AAR. The requested page is displayed and available for completion. Enter the required data elements and click the **Save** button.

6. The AAR page is re-displayed and provides an opportunity to include attachments and/or input additional data. When the required information is entered, click the **Save and Start Workflow** button. Click the **OK** button to indicate the intent to advance to the next step.
7. The AAR is initially routed to the Inbox of the person who created the request. If the person who created the AAR is also the Recipient Authorized Representative (RAR), s/he can submit the request to the sponsoring agency.
8. Otherwise the task must be sent to the organization's RAR who subsequently forwards the request to the sponsoring agency.

## Submit an ASAP Enrollment
### NOAA Only
For assistance with ASAP enrollment contact:
Darius Porter: Darius.Porter@noaa.gov

1. Click the **Awards** tab.
2. Click the **ASAP Enrollment Request** link.
3. Select the appropriate organization from the dropdown list. Click the **Submit** button.
4. Complete the Point of Contact section, then click the **Save and Start Workflow** button.
5. From the Organization Profile Change Request launch screen, select **Forward Request to Authorized Representative**. Click the **Submit** button.
6. If the person who created the ASAP enrollment request is also a RAR, s/he can forward the request to the sponsoring agency.

### MBDA, ITA, EDA
MBDA, ITA contacts:
Angela Carpenter@noaa.gov (MBDA)
Helen Pham@noaa.gov (ITA)

EDA contact:
ASAP Enrollment (NOAA Finance)

## Submit a Performance Progress Report
### NOAA, ITA, EDA and OSEC
1. Click the **Awards** tab.
2. Click the **Search Reports** link.

3. The Search Financial and Performance Progress Reports page is visible. To locate the **Progress Report** associated with the award, the user can perform a generic search (leave all boxes at the top of the screen blank and select All Reports for the Report Status and the Report Type). The user may also narrow the search by specifying one of more search criteria. Click the **Search** button.

4. On the Search Report Results launch page, locate and click the appropriate **Performance Progress Report** link. The Performance Progress Report page is visible.

5. Click the **Go to Performance Progress Report – Details Page** link.

6. From this page, the user can attach his/her report. The Federal Program Officer has defined the acceptable format and content for Progress Reports.

7. To identify each attachment that should be uploaded:
   a. Click the **[+]** link next to the words Add New Attachment.
   b. Click the **Choose File** button and navigate to the appropriate file stored on the user's computer.
   c. Provide a short description of the attachment for the Description**\*** data element.
   d. Click the **Save Attachment** button; the attachment is uploaded to Grants Online.

8. To start workflow, click the **Save and Start Workflow** button.

9. To proceed, click the **Yes** button; otherwise click the **No** button. The review task goes to the creator of the document and the organization's Recipient Authorized Representative(s). If the user is the RAR, s/he can forward the Progress Report to the sponsoring agency.

## MBDA, NTIA

MBDA and NTIA do not submit reports directly to Grants Online. MBDA uploads its reports to an internal system. Subsequently, the Program Officer obtains the relevant information and enters data into Grants Online. In a similar manner, NTIA extracts information from an internal database and enters data into Grants Online.

Contact the appropriate (MBDA or NTIA) Federal Program Officer to obtain an explanation of the steps required to complete the Performance Progress Report.

## Submit a SF-425 Cash Flow or Full Federal Financial Report

1. Click the **Awards** tab.
2. Click the **Search Reports** link.
3. To locate the **Financial Report** associated with the award, the user can perform a generic search (leave all boxes at the top of the screen blank and select All Reports for the Report Status and the Report Type). The user may opt to narrow the search by specifying one or more search criteria. When conducting a narrowed search, make certain to click the checkbox next to **Include reports with no Start Date (SF-425)** and **Include reports with no End Date (SF-270).**
4. Click the **Search** button.
5. On the Search Report Results launch page, locate and click the appropriate **Federal Financial Report** link. The Federal Financial Report launch page is visible.
6. Click the **Go to SF-425: Federal Financial Report** link.
7. The form contains numerous sections of detailed financial information. The data fields available for data entry vary by agency.
8. All mandatory data entry fields have a red asterisk (**\***). Although some fields cannot be edited, all fields must be reviewed for accuracy. Contact the Grants Online Help Desk for assistance resolving inaccuracies for non-editable fields.
9. To start workflow, click the **Save and Return to Main** button. A review task will be sent to the Inbox of the person who created the report.

**Submit a SF-425A Multiple Awards Federal Financial Report (for the Interim Report)**
**NOAA Only**
1. Click the **Awards** tab.
2. Click the **SF-425A for Multiple Awards** link.
3. On the SF-425 Overview page for the selected organization, specify an End Date & End Year.
4. Click the **Create Multiple Award SF-425A** button.
5. To indicate which Award Numbers should be under the **Awards Not Included in this SF-425** header and those that should be under the **Awards Included in this SF-425** header, use the checkbox beside the Award Number.
6. Click the **Add Selected Awards to Report** button.
7. Enter information for the **Cumulative Federal Cash Disbursement** (mandatory) and the **Recipient Account No.** (optional) data fields.
   *– or –*
   As an alternative, the user may save the data entered thus far and resume data entry later. To do so, advance to step 9.
8. When data entry is complete, click the **Go to the SF-425 Details page** link. Advance to step 10.
9. If not ready to navigate to the SF-425 details page, click the **Save** button to preserve data for later use. The user may opt to click the **Print** button to generate a printable PDF version of the SF-425A.
10. The SF-425 form is visible. The data in this form should be based on the transactions for all Awards included on the SF-425A. Verify the accuracy of all data, both the locked and unlocked data elements. Contact the Grants Online Help Desk for assistance resolving inaccuracies for non-editable fields.
11. To start workflow, click the **Save and Return to Main** button. A task is sent to the Inbox of the person who created the SF-425A.
12. Click the **Inbox** tab. Click the **Task** link.
13. Click the **View** link next to the SF-425A task.
14. The Federal Financial Report launch page is visible. The Action dropdown menu contains the following options:

- **Forward Multiple SF-425 Cash Flow Report to Agency** – forwards the report to the agency for approval. The task may **only** be completed by those with the Recipient Authorized Representative or Biz/Fin Representative (submitting) role.
- **Reassign Multiple Award SF-425 Cash Flow Report** – routes the report to another Recipient Authorized Representative for review and approval prior to the report being submitted to the sponsoring agency.
- **Review/Edit Multiple Award SF-425A Cash Flow Details** – opens the Multiple Award Details page for review. The document is unlocked and revisions can be made prior to sending for approval.
- **Review/Edit SF-425 Details** – opens the SF-425 Details page for review. The document is unlocked and revisions can be made prior to sending for approval.

**Create and Submit a SF-270 Request for Advance or Reimbursement**
The SF-270 should only be used by organizations that are unable to draw down funds using the Department of Treasury's ASAP system. NOAA ASAP Risk Recipients must use the SF-270 to draw down funds.
1. Click the **Awards** tab.
2. Click the **Search Awards** link.
3. Enter the Award Number and click the **Search** button. The search results are displayed at the bottom of the screen. Locate and click the **Award Number** link.
4. When the Grants File launch page is visible, select **Create SF-270** from the Action dropdown menu. Click the **Submit** button.
5. From the SF-270 launch page, click the **Go to SF-270: Request for Advance or Reimbursement Details Page** link.
6. On the SF-270, all fields that require data entry are marked with a red asterisk (*). Specify the Type of Payment Requested – either Advance or Reimbursements. For item 1(b) specify either Final or Partial.

7. When data entry is complete, click the **Save** button at the bottom of the screen.
8. The Type of Payment Requested (Advance or Reimbursement) determines the secondary screen. To access the next screen, click the **Alternate Computation** or the **Computation** link.
9. To retain data entered for either secondary screen, click the **Save and Return to Main** button.
10. Irrespective of the computation method used, click the **Save and Certify** button.
11. To validate the SF-270's data accuracy, click either the **Agree** – *or* – **Agree – Start Workflow** button.
12. A task is placed in the user's Inbox to initiate the process of sending the SF-270 to the appropriate Federal agency.
13. If the user is an Authorized Representative or a Biz/Fin Representative (submitting) he/she will be able to Forward Request for Advance or Reimbursement to the Agency. Otherwise the user should send the SF-270 to either of the two aforementioned roles.

## Add/Edit Your Organization's Users
**Recipient Administrator ONLY**
1. Click the **Awards** tab.
2. Click the **Manage Recipient Users** link.
3. Select the appropriate organization from the dropdown menu. A list of users for the selected Grants Online organization is visible.
4. To update a user's access:
   a. Click the **Manage Award Access** link on the same line as the user's name.
   b. Select or deselect the appropriate checkbox(es) for the level of access the user should be assigned.
   c. Click the **Assign** button at the bottom of the page to complete changes.
   d. Click the **Cancel** button to return to the previous page (changes have been saved).
5. To add users to the organization:
   a. Complete steps 1-3 in this section of the document.

b. Click the **Add Another User** link at the bottom of the Manage Recipient Users page.
c. Enter data for the mandatory (**\***) data elements (first name, last name, email address, and phone number) on the Create Recipient User page. The username, as noted, is generated when the information is saved.
d. Select the user's role from the **User Role** dropdown list.
e. Click the **Save** button. If there are no errors, the username is generated; otherwise make the necessary changes and attempt to save the data again.
f. After obtaining a new username, you must also **give the user a temporary password**. If you are unsure how to do this follow the steps associated with item 6d in this section.
g. Instruct the user to log into Grants Online using those credentials and set up his/her security questions.
6. To edit account details, unlock a user's account or reset the user's password:
   a. Complete steps 1-3 in this section of the document.
   b. Click the **Edit Profile** link on the same line as the username.
   c. With the exception of the username, all information on the screen can be edited.
   d. To generate a temporary user password:
      • Click the **Reset Password** button on the Edit Recipient User page.
      • In response to *"Are you sure?"* click either the **Reset** or the **Done** button. The **Reset** button generates a new (temporary) password that should be provided to the user. The **Done** button cancels the request.
      • After providing the temporary password to the user, navigate away from the current screen.
   e. To unlock a user account:
      • Click the **Unlock Account** button on the Edit Recipient User page.
      • A message on the screen displays when the user account was successfully unlocked.

**Grants Online Tabs and Links**
To learn how to access and navigate the Grants Online software click here:  Grants Online System Navigation.

The Grants Online system's main launch screen has **Tabs** from which the user can access general categories of features. Each **Tab** has **Links** to the items associated with that category. The **Links** are displayed vertically in the left-hand column (the Navigation pane) and in the main portion of the screen (the Document pane).

Below is a list and explanation of the **Tabs** (Inbox, Awards, Account Management, and Help) available to Grants Online recipients:

**Inbox Tab:**
- **Advisories** – The first page displayed after successful login and acceptance of use conditions.
- **Archived Notifications** – Notifications that were originally accessible from the Notifications link.
- **Notifications** – Internal messages and external email messages. Notifications may be viewed, deleted, or archived.
- **Task Management** – Allows tasks to be reassigned between users. A task with a **Not Started** status cannot be reassigned. For other tasks, refer to the **Reassign a Task** section of this document.
- **Tasks** – Tasks assigned to a user are visible. See the **Process an Inbox Task** section of this document.

**Awards Tab:**
- **ASAP Enrollment Request** – Request an Automated Standard Application for Payment (ASAP) user account.

- **Manage Recipient Users** – Only the Recipient Administrator (RA) has this link. The Recipient Administrator can perform his/her responsibilities and access his/her organization's award information. Refer to the **Add/Edit Your Organization's Users** section of this document.
- **SF-425A for Multiple Awards** – The user can view, create or replace the SF-425 Federal Financial Reports for multiple awards for the same recipient organization. Refer to the **Submit a SF-425A Federal Financial Report – Multiple Awards Report or an Interim Report** section of this document.
- **Search Awards** – Search for Awards by Award Number or Recipient Name.
- **Search Reports** – Search for Federal Financial Reports (FFRs) and/or Performance Progress Reports (PPRs).

**Account Management Tab:**
- **My Delegations** – View and update the users to whom you have delegated your Inbox tasks. Delegations may only be made to a peer with the same or lesser access privileges**.**
- **My Preferences** – View and update site preferences, notification preferences, and task preferences.
- **My Profile** – View and update a user's personal profile (e.g., name and address information, security questions/answers, and email).

**Help Tab:**
Please refer to page 11 of this document for the Help Desk:
- Hours of operation
- E-mail
- Phone

| Grant Recipient User Roles – Definitions ||
|---|---|
| **User Role** | **Responsibilities** |
| **Recipient Authorized Representative (also referred to as the Authorized Representative)** | Has signatory authority for official grant documents (e.g., SF-424). A person with this role may countersign Award documents (e.g., New Award, CD-450, or amendment (CD-451)). More than one person may have this role at an organization. For each award, only one person is designated as the primary Authorized Representative. |
| **Recipient Administrator** | Has permission to set-up other people in his/her organization as Grants Online users. The Recipient Administrator can also give a user access, as appropriate, to specific awards. |
| **Business / Financial Representative (Biz/Fin)** | Can initiate Award Action Requests and prepare Federal Financial Reports (FFRs). A person with this role **cannot** submit the FFR directly to the Federal agency; he/she must send it to the organization's Authorized Representative. |
| **Business / Financial Representative – Submitting (Biz/Fin)** | Has the same role as the Business / Financial Representative. However, a person with this role **may** submit the FFR directly to the Federal agency without routing it through an Authorized Representative. |
| **Principal Investigator / Project Director (PI/PD)** | Can initiate Award Action Requests and complete Performance Progress Reports (PPRs). A person with this role **cannot** submit the PPR directly to the Federal agency; he/she must send it to the organization's Authorized Representative. |
| **Principal Investigator / Project Director – Submitting (PI/PD)** | Has the same role as the Principal Investigator / Project Director. However, a person with this role **may** submit the PPR directly to the Federal agency without routing it through an Authorized Representative. |
| **Key Personnel (Recipient User)** | Can view assigned awards for his/her organization and initiate Award Action Requests. However, a person with this role must submit documents to the organization's Authorized Representative. The Authorized Representative will review and submit documents to the agency. |
| **More than one user can have the same role.** <br> **A single user can have more than one role.** ||

# Grants Online
## Grant Recipient's Quick Reference Guide

| Grant Recipient User Roles – Functionality | | | | | | | |
|---|---|---|---|---|---|---|---|
| Role / Functionality | Recipient Authorized Representative | Recipient Administrator | Biz/Fin Representative | Biz/Fin **Submitting** | PI/PD Investigator | PI/PD **Submitting** | Recipient User |
| View/Access All Org. Awards | X | X | X | X | | | |
| View/Access Assigned Awards | | | | | X | X | X |
| Manage Recipient Users | | X | | | | | |
| Reassign Tasks | X | X | | | | | |
| Submit an ASAP Enrollment | X | | | | | | |
| | | | | | | | |
| Initiate Award Action Request | X | X | X | X | X | X | X |
| Submit Award Action Request | X | | | | | | |
| | | | | | | | |
| Complete Financial Report | X | | X | X | | | |
| Submit Financial Report | X | | | X | | | |
| | | | | | | | |
| Complete Progress Report | X | | | | X | X | |
| Submit Progress Report | X | | | | | X | |

**Useful Links:**

Access to the Grants Online login page.

From the Grants Online Program Management Office website there are links dedicated to:
- Grant Recipient User Resources
- Release Notes, Known Issues, and the Grants Online Maintenance Schedule

If your Recipient Administrator provided a username, but **did not** provide a temporary password, please inform them they need to generate and provide you with a temporary password. Both items are required to log in to Grants Online.

If you don't know the Recipient Administrator for your organization, the Grants Online Help Desk can provide that person's contact information. The Grants Online Help Desk's contact information:

- E-mail:   GrantsOnline.HelpDesk@noaa.gov
- Phone:   (240) 533-9533
- Hours of operation – 8:00 a.m. to 6:00 p.m., ET
         Monday through Friday, excluding Federal holidays

We request you use **one method of communication** for the same issue/concern.

- If you **emailed** the Help Desk, a call to the Help Desk about the same issue will not expedite resolution of your question.

- If you **called** the Help Desk, an email about the same issue will not expedite resolution of your question.