



Grants Management & Federal Program Office

Supplementary Information, Correspondence and Federal Reports

NOAA Grants Online Program Management Office

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Supplementary Information Overview

Supplementary Information for awards and applications can be used to assist users with day-to-day award management. Use Supplementary Information to quickly locate awards or applications that meet certain criteria. There are 2 components for Supplementary Information: category and value.

Each category is managed by staff in one of three tiers:

1. Bureau
2. Line Office
3. Program Office

Values are used to further define categories.

If your Program Office (e.g., NOAA Fisheries NE Region) is involved in fisheries management, it may be logical to create a Fish Species category. This category can be used to manage awards or applications that belong to your Program Office. Values that might be included in the Fish Species are: Black Sea Bass, Cod, and Flounder.

Another Program Office (e.g., NOAA Fisheries SE Region) may also be involved in fisheries management. That Program Office may opt to also create a Fish Species category. For this Program Office, the values that might be included in the Fish Species are: Goliath Grouper, Red Snapper, and Rock Shrimp.

Users can select values from categories to associate with awards/applications based on the placement of the category in their “chain of command”. Example: An award belonging to the Fisheries NE Regional Office can be associated with supplemental values from categories that belong to their own Program Office (NERO), their Parent Line Office (NMFS), or the Bureau (NOAA).

Refer to the [Managing Supplementary Categories](#) section of the document for an explanation of the administrative action(s) that may be performed by System Administrators and Grants Management Advisory Council (GMAC) Representatives.

Search by Supplementary Values

1. Click on the **Awards** tab and then click the **Search Awards** link.
2. The Search Awards screen displays. The Supplementary Information Category drop down shows all categories available to the user.

The screenshot shows a web form titled "Search Awards". It contains several input fields: "Award Number:", "Recipient Name:", "DBA Name:", "Project Title:", "Award Status:" (with a dropdown menu showing "Open"), and "PI-PD Last Name:". Below these is the "Supplementary Information Category" dropdown menu, which is open and shows three options: "Key Word", "NOAA Bureau Category", and "OCPO Program Office Category". The "Supplementary Value:" field is also present. At the bottom left of the form are "Search" and "Reset" buttons. Below the form fields is a note: "Please use the above fields to narrow down your search. Searches are not case-sensitive. Fields can be partially completed to get all matching results. Use % as wildcard in search string."

In this example, the user is a NOAA user. The “NOAA Bureau Category” is a Bureau tier category and is available to all users in the NOAA bureau. The “OCPO Program Office Category” will be available to all users from the OCPO Line Office. Note that personnel who have Bureau level visibility, e.g. GMD users, will see all categories defined within their own Bureau, regardless of the tier level, as in this example.

Note: Recipient users will not see the Supplementary Information Category field nor the Supplementary Value field on their Search Award page.

- 3. Choose the "Key Word" option from the Supplementary Information Category drop down and click the **Search** button.

Search Awards

Award Number:

Recipient Name:

DBA Name:

Project Title:

Award Status:

PI-PD Last Name:

Supplementary Information Category:

Supplementary Value:

- 4. Executing the above query for "Key Word" gives the following results:

Search Results

4 items found, displaying all items.1

Award Number	Org ID	Recipient Name	DBA Name	Project Title	Award Status	Principal Investigators-Project Directors	Supplementary Values
NA18GOT9980106	2005834	CARDINAL PEAK TECHNOLOGIES, LLC		Gstudent 05 Fish Pit Tags for RedFish Lake	Accepted	None Designated	Council, Data Collection, Research
NA18GOT9980108	2005834	CARDINAL PEAK TECHNOLOGIES, LLC		gstudent03-Variances in blue whale migration patt...	Accepted	None Designated	Habitat, Research
NA18GOT9980028	2005834	CARDINAL PEAK TECHNOLOGIES, LLC		TRAINING RECORD - Descriptive Title of Applicant's...	Accepted	Arthur Rep12, Arthur Rep25	Data Collection
NA18GOT9980038	2005834	CARDINAL PEAK TECHNOLOGIES,		gstudent09 Great Lakes	Accepted	Arthur Rep12	Regulations, Research

The Search Results will contain the Supplementary Values column only when the Supplementary Information Category is selected for the search parameters. An award/application can be associated with multiple values for each category. When queried on the search page, the values are concatenated into an alphabetized comma delimited list for display. Only the Supplementary Values for the category that is searched will be displayed in the results.

- Adding a Supplementary Value on the parameter page is optional when searching and will further narrow the search results to those awards that contain the entered text. Add “Regulations” in the Supplementary Value field to further narrow the search results. Click the **Search** button.

Search Awards

Award Number:

Recipient Name:

DBA Name:

Project Title:

Award Status:

PI-PD Last Name:

Supplementary Information Category:

Supplementary Value:

Please use the above fields to narrow down your search. Searches are not case-sensitive. Fields can be partially completed to get all matching results. Use % as wildcard in search string.

Search Results

One item found.1

Award Number	Org ID	Recipient Name	DBA Name	Project Title	Award Status	Principal Investigators-Project Directors	Supplementary Values
NA18GOT9980038	2005834	CARDINAL PEAK TECHNOLOGIES,		gstudent09 Great Lakes	Accepted	Arthur Rep12	Regulations, Research

In the example above, Award NA18GOT9980038 shows the “Regulations” and “Research” values associated with the “Key Word” category, but it is also associated with another Supplementary Information Category. The association with this other Supplementary Information Category is not displayed in the search results.

Viewing Supplementary Values

1. Navigate to the Grant File launch page. Continuing from the previous example, click on Award Number NA18GOT9980038 from the Search Results screen.
2. Scroll down to the Supplementary Information section, between the Correspondence and Federal Reports section and the Financial Reports section.

Correspondence and Federal Reports (This section not viewable by recipient users.)

Type	ID	Date / Start Date	End Date	Subject	Created By
Email	2694208	02/06/2018		test	Grants Student09

Export options: [Excel](#)

Supplementary Information

Category	Value	Update By	Update Date
Key Word	Regulations	Grants Student16	06/12/2018
Key Word	Research	Grants Student16	06/12/2018
OCPO Program Office Category	TRUE	Grants Student16	11/21/2018

Export options: [Excel](#)

Financial Reports

Type	ID	Period Start	Period End	Due Date	Status	Amount Requested
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The Supplementary Information header link is visible to the Program Office Personnel and System Administrators and allows the user to manage the Supplementary Values. Any awards or applications for which there are no Supplementary Values, the message “Nothing found to display” is visible below the header.

Note: For grantees, the Supplementary Information header is visible, however it is not a link. Grantees have view only access to this section.

Managing Supplementary Values

1. Navigate to the Grant File launch page or the Application launch page.
2. Scroll down to the Supplementary Information section.
3. Click the **Supplementary Information** link.

Supplementary Information			
Category	Value	Update By	Update Date
Key Word	Regulations	Grants Student16	06/12/2018
Key Word	Research	Grants Student16	06/12/2018
OCPO Program Office Category	TRUE	Grants Student16	11/21/2018

Export options: [Excel](#)

4. The Supplementary Information details page is displayed.

Supplementary Information - NA18GOT9980038					
Guidance					
Category	Value	Description	Update By	Update Date	Action
Key Word	Regulations		Grants Student16	06/12/2018	Delete
Key Word	Research		Grants Student16	06/12/2018	Delete
OCPO Program Office Category	TRUE		Grants Student16	11/21/2018	Delete

[Add New >>](#)

[Done](#)

The Add New >> link is visible only if there are available Supplementary Information categories for which values may be added. The Delete link to the right of each value immediately removes that value from association with the award or application.

5. If appropriate click the **Add New>>** link.

Supplementary Information - NA18GOT9980038					
Guidance					
Category	Value	Description	Update By	Update Date	Action
Key Word	Regulations		Grants Student16	06/12/2018	Delete
Key Word	Research		Grants Student16	06/12/2018	Delete
OCPO Program Office Category	TRUE		Grants Student16	11/21/2018	Delete

[Add New >>](#)

[Done](#)

6. All of the Supplementary Categories for which the user may add values are displayed. In this example the following page displays:

Supplementary Information - NA18GOT9980038

[Guidance](#)

Category	Value	Description	Update By	Update Date
Key Word	Regulations		Grants Student16	06/12/2018
Key Word	Research		Grants Student16	06/12/2018
OCPO Program Office Category	TRUE		Grants Student16	11/21/2018

Add New Supplementary Information Category

Category	Description	Action
Aquaculture		Add
Key Word	Supplementary Category created for training.	Add
NOAA Bureau Category	Bureau level Supplementary Category created for training.	Add
OCPO Program Office Category	Program Office level Supplementary Category created for training.	Add

[Done](#)

7. Click the **Add** link next to Key Word Category.

Supplementary Information - NA18GOT9980038

[Guidance](#)

Category	Value	Description	Update By	Update Date
Key Word	Regulations		Grants Student16	06/12/2018
Key Word	Research		Grants Student16	06/12/2018
OCPO Program Office Category	TRUE		Grants Student16	11/21/2018

Add New Supplementary Information Category

Category	Description	Action
Aquaculture		Add
Key Word	Supplementary Category created for training.	Add
NOAA Bureau Category	Bureau level Supplementary Category created for training.	Add
OCPO Program Office Category	Program Office level Supplementary Category created for training.	Add

[Done](#)

- If appropriate, click the **Select** link that corresponds to the desired value under the Supplementary Information Value heading. For this example, click the Select link for the value "Habitat".

Supplementary Information - NA18GOT9980038

[Guidance](#)

Category	Value	Description	Update By	Update Date
Key Word	Regulations		Grants Student16	06/12/2018
Key Word	Research		Grants Student16	06/12/2018
OCPO Program Office Category	TRUE		Grants Student16	11/21/2018

Add Supplementary Information Value
 Category: Key Word
 Select From List Below

Value	Description	Action
BRD		Select
Bering Sea		Select
Chesapeake		Select
Council		Select
Crab		Select
Data Collection		Select
Florida		Select
Groundfish		Select
Gulf of Mexico		Select
Habitat		Select
Oyster		Select
Regulations		Select
Research		Select
Shellfish		Select
Turtle		Select
TRUE		Select
CHINA		Select
CICOR		Select
MEXICO		Select
JIMO		Select
CICS-M		Select
CIASTA		Select

Done

9. The new Key Word is now associated with this award. Click the Done button to conclude the process.

Supplementary Information - NA18GOT9980038

[Guidance](#)

Category	Value	Description	Update By	Update Date
Key Word	Habitat		Grants Student16	11/21/2018
Key Word	Regulations		Grants Student16	06/12/2018
Key Word	Research		Grants Student16	06/12/2018
OCPO Program Office Category	TRUE		Grants Student16	11/21/2018

Add Supplementary Information Value
Category: Key Word
Select From List Below

Value	Description	Action
BRD		Select
Bering Sea		Select
Chesapeake		Select
Council		Select
Crab		Select
Data Collection		Select
Florida		Select
Groundfish		Select
Gulf of Mexico		Select
Habitat		Select
Oyster		Select
Regulations		Select
Research		Select
Shellfish		Select
Turtle		Select
TRUE		Select
CHINA		Select
CICOR		Select
MEXICO		Select
JIMO		Select
CICS-M		Select
CIASTA		Select

Done

NOTE: Selecting a value for association with an award/application that is already associated will have no effect (i.e., the value will not be added a second time).

If you are processing an application for approval, either as an award or as an amendment to an existing award, upon Grants Officer signature of the funding document any Supplementary Values associated with the application will be copied to the award.

10. Insertions or deletions of values can be viewed by clicking the Audit Trail icon. Supplementary Values may be added to an award when it is approved by the Grants Officer or to an application when it is created. There is no expiration date for adding Supplementary Values, (i.e., they may be added to closed awards).


Supplementary Information - NA18GOT9980038

[Guidance](#)

Category	Value	Description	Update By	Update Date	Action
Key Word	Habitat		Grants Student16	11/21/2018	Delete
Key Word	Regulations		Grants Student16	06/12/2018	Delete
Key Word	Research		Grants Student16	06/12/2018	Delete
OCPO Program Office Category	TRUE		Grants Student16	11/21/2018	Delete

[Add New >>](#)

Done

Audit Trail: 

Managing Supplementary Categories

System Administrators are authorized to manage all 3 tiers (Bureau, Line Office, and Program Office) of Supplementary Categories. GMAC Representatives are authorized to manage their own Line Office categories, and all Program Office under their Line Office. The Primary Office Contact can manage Supplementary Categories that are assigned to their Program Office.

1. To manage Supplementary Categories, click on the **Awards** tab, then click on the link for **Supplementary Information Management**.

The screenshot displays the Grants Online system interface. At the top left is the Department of Commerce logo. The main navigation bar includes tabs for **Inbox**, **RFA**, **Application**, **Awards**, **Account Management**, **Reports**, and **Help**. The **Awards** tab is highlighted with a red box. Below the navigation bar, a welcome message reads: "Welcome to Grants Online Grants: Student16. You are logged in to TRAIN2Nv." A **Log Off** button is visible in the top right. On the left sidebar, a menu contains **Search Awards**, **Search Reports**, and **Supplementary Information Management**, with the latter highlighted by a red box. The main content area shows the breadcrumb path: [Search Awards](#) >> [Grants File - NA18GOT9980038](#) >> [My Profile](#) >> [My Preferences](#). The **Awards** section includes a link for **- Search Awards -** and a description: "The Search Awards feature allows you to find Awards by Award Number or Recipient Name." Below this is a section for **Federal Program Officers and Grants Management Division Users** with instructions on navigating to a Grant File launch page. The **Grantees** section explains search criteria and provides a link for **- Search Reports -**. At the bottom, a link for **- Supplementary Information Management -** is highlighted with a red box, with the description: "Manage the supplementary information for association with awards and applications."

- The Supplementary Information Categories screen is displayed. The image below is the list visible to a System Administrator – their view is of all Supplementary Information categories defined in the system. Other users will only see the Supplementary Information Categories they are authorized to manage.

Supplementary Information Categories

[Guidance](#)

29 items found, displaying all items.1

Edit	ID	Name	Controlling Organization	Organization Level	Lookup Type
Edit	26	RE - Research (CFDA 3.12)	Economic Development Administration (EDA)	Bureau	None
Edit	25	TA - Technical Assistance (CFDA 11.303)	Economic Development Administration (EDA)	Bureau	Hard
Edit	27	TJ - Trade Adjustment Assistance (11.313)	Economic Development Administration (EDA)	Bureau	None
Edit	1	American Recovery and Reinvestment Act	National Oceanic and Atmospheric Administration (NOAA)	Bureau	None
Edit	28	B-WET	National Oceanic and Atmospheric Administration (NOAA)	Bureau	Hard
Edit	24	CESU	National Oceanic and Atmospheric Administration (NOAA)	Bureau	Hard
Edit	9	Cooperative Institute	National Oceanic and Atmospheric Administration (NOAA)	Bureau	Hard
Edit	7	American Recovery and Reinvestment Act	National Telecommunications and Information Administration (NTIA)	Bureau	None
Edit	31	Aquaculture	National Marine Fisheries Service (NMFS)	Line Office	None
Edit	30	CESU	National Marine Fisheries Service (NMFS)	Line Office	Soft
Edit	32	Key Word	National Marine Fisheries Service (NMFS)	Line Office	Soft
Edit	11	BAA	Fisheries Northwest Region Program Office (NWRO)	Program Office	Hard
Edit	8	Disaster Programs	Fisheries Northwest Region Program Office (NWRO)	Program Office	Hard
Edit	21	HCD	Fisheries Northwest Region Program Office (NWRO)	Program Office	None

[Add a new category >>](#)

Lookup Types

You can change the Lookup Type between any of the three lookup types: None, Soft, and Hard. This will not change any of the existing values already associated with documents, but it will limit (or expand) the values that can be associated with artifacts in the future. The lookup types are:

None – The act of associating a value with a document is sufficient; there is no need to specify additional values to this lookup type.

Soft – This lookup type is currently not working. This is a known issue. Please do not use this lookup type.

Hard – The Supplementary Category Manager defines all possible values. Users have a limited number of choices of the values that can be associated with an artifact. Users cannot create new values when associating a value with an artifact.

- 2. To see an example, click on the **Edit** link next to “CESU”.

Supplementary Information Categories

[Guidance](#)

29 items found, displaying all items.1

Edit	ID	Name	Controlling Organization	Organization Level	Lookup Type
Edit	26	RE - Research (CFDA 3.12)	Economic Development Administration (EDA)	Bureau	None
Edit	25	TA - Technical Assistance (CFDA 11.303)	Economic Development Administration (EDA)	Bureau	Hard
Edit	27	TJ - Trade Adjustment Assistance (11.313)	Economic Development Administration (EDA)	Bureau	None
Edit	1	American Recovery and Reinvestment Act	National Oceanic and Atmospheric Administration (NOAA)	Bureau	None
Edit	28	B-WET	National Oceanic and Atmospheric Administration (NOAA)	Bureau	Hard
Edit	24	CESU	National Oceanic and Atmospheric Administration (NOAA)	Bureau	Hard

3. The Supplementary Information Category screen is displayed.

Supplementary Information Category

Category Name *

Lookup Type *

Organization Level *

Owning Organization* National Marine Fisheries Service (NMFS)

Description

List of Values

Order	Value	Actions
1	University of California System - California	Edit Delete
2	University System of Maryland - Chesapeake Watershed	Edit Delete
3	Texas A&M University - Gulf Coast	Edit Delete
4	University of Hawaii System - Hawaii-Pacific Islands	Edit Delete
5	University of Rhode Island - North Atlantic Coast	Edit Delete
6	University of Georgia - Piedmont-South Atlantic Coast	Edit Delete
7	University of Washington - Pacific Northwest	Edit Delete
8	University of Miami - South Florida-Caribbean	Edit Delete
9	University of Alaska System - North and West Alaska	Edit Delete

[Reorder](#)

[Add >>](#)

A System Administrator can change the Category Name when there are not any artifacts (awards, amendments, or applications) associated with the category. However an attempt to change the Category Name when a category has been associated with an artifact generates an error message.

A System Administrator can promote a category from Line Office to Bureau. After promotion, the category is eligible for association with all awards in the Bureau (parent level) as in the currently associated Line Office (child level). Similarly, a GMAC representative can promote a Program Office (child level) category to the Line Office (parent level).

Correspondence and Federal Reports Overview

Correspondence and Federal Reports is the area provided to keep miscellaneous documents. This section is not viewable by Recipient users. Two types of documents are included in this example: a Memo for Record and an Email.

- 1. Click the Memo for Record ID link to view its details.

[Correspondence and Federal Reports](#) (This section not viewable by recipient users.)

Type	ID	Date / Start Date	End Date	Subject	Created By
Memo for Record	2694468	02/20/2018		Memo for Training Documentation	Grants Student30
Email	2694469	02/20/2018		Email	Grants Student30

Export options: [Excel](#)

- 2. The Memo for Record details page is displayed. To download and view an attachment, click the **Name** link or the **Download All** button. To return to the previous screen, click the **Cancel** button.

Correspondence and Federal Reports - ED18EG09980007

Attachments:

Name	Short Description	Created Date	Internal Use Only/Remove
Attachment.docx	Attached Memo	02/20/2018 03:36:45 PM	No Remove

Download All [Large File Guidance](#)

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 if there are more than 10 attachments.

Type: *
Date or Start Date: * End Date:
Title or Subject: *

Comments:

Created By:

Audit Trail:

- To specify an additional item for the Correspondence and Federal Reports click the **Add New >>** link.

Correspondence and Federal Reports - ED18EGO9980007

Recipient users cannot see the Correspondence and Federal Reports section on the Grants File launch page and have no access to any of this information. If you have files that need to be viewed by recipient personnel, attach them to the Grants File launch page or to other documents if appropriate and available.

Type	ID	Date / Start Date	End Date	Title or Subject	Created By
Memo for Record	2694468	02/20/2018		Memo for Training Documentation	Grants Student30
Email	2694469	02/20/2018		Email	Grants Student30

[Add New >>](#) [Reorder >>](#)

Run Report **Cancel**

- Click the dropdown menu to view the Type* of Correspondence and Federal Reports available for selection.

Correspondence and Federal Reports - ED18EGO9980007

Note: The Attachments link does not appear until the document is successfully saved.

Type: * End Date:

Date or Start Date: *

Title or Subject: *

Comments:

Created By: **Spell Check**

Save **Cancel**

Run Report

- 5. Select Memo for Record from the dropdown list. Enter information in all required and applicable fields then click the **Save** button.

Correspondence and Federal Reports - ED18EGO9980007

Note: The Attachments link does not appear until the document is successfully saved.

Type: *

Date or Start Date: * End Date:

Title or Subject: *

Comments:

Created By: **Spell Check**

Save **Cancel**

Run Report

- 6. When the item has been saved, the attachments widget is visible. Click the **[+]** link to add an attachment.

Correspondence and Federal Reports - ED18EGO9980007

Attachments:

No attachments.

Add new Attachment: [\[+\]](#)

Any changes to information on this page should be saved before adding or removing attachments. File name should follow [Large File Guidance](#)

Type: *

Date or Start Date: * End Date:

Title or Subject: *

Comments:

Created By: Ana Holt **Spell Check**

Save **Lock** **Cancel**

Run Report

- The Attachments section displays. Click the **Choose File** button to search for the file that is to be uploaded.

- Enter a short description of the attachment in the Description* box. If the attachment is for **Internal use only**, mark the checkbox **before** clicking the **Save Attachment** button.
- When all information has been entered and any relevant attachments have been uploaded, click the **Save** button.

10. Repeat steps 3 – 9 as many times as is necessary to specify additional attachments.
11. The **Lock** button locks the Correspondence and Federal Reports artifact for ALL users, including you. Help Desk assistance is required to unlock the artifact.
12. Click the **Cancel** button to return to the previous screen.