Master Series: Reverse Workflow (Walking Back an Award)

June 20, 2024

Objectives

- ✕ Delete the Draft Notice of Award

- 🚫 Reject the Funding Memo

- ◈ Delete the Funding Memo

- ⏏ Withdraw an Application in Review

- ↺ Return an Application

- ↩ Uncomplete an Application

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Course Agenda

- Introduction
- New Application Workflow
- Walking back a New Draft Award
  - Walk back a New Draft Award to the Application Recommendation screen
  - Withdraw a New Application from the Review Process
- Amendment Workflow
- Walking back an Amendment Application
  - Uncomplete an Amendment Application
  - Return an Application
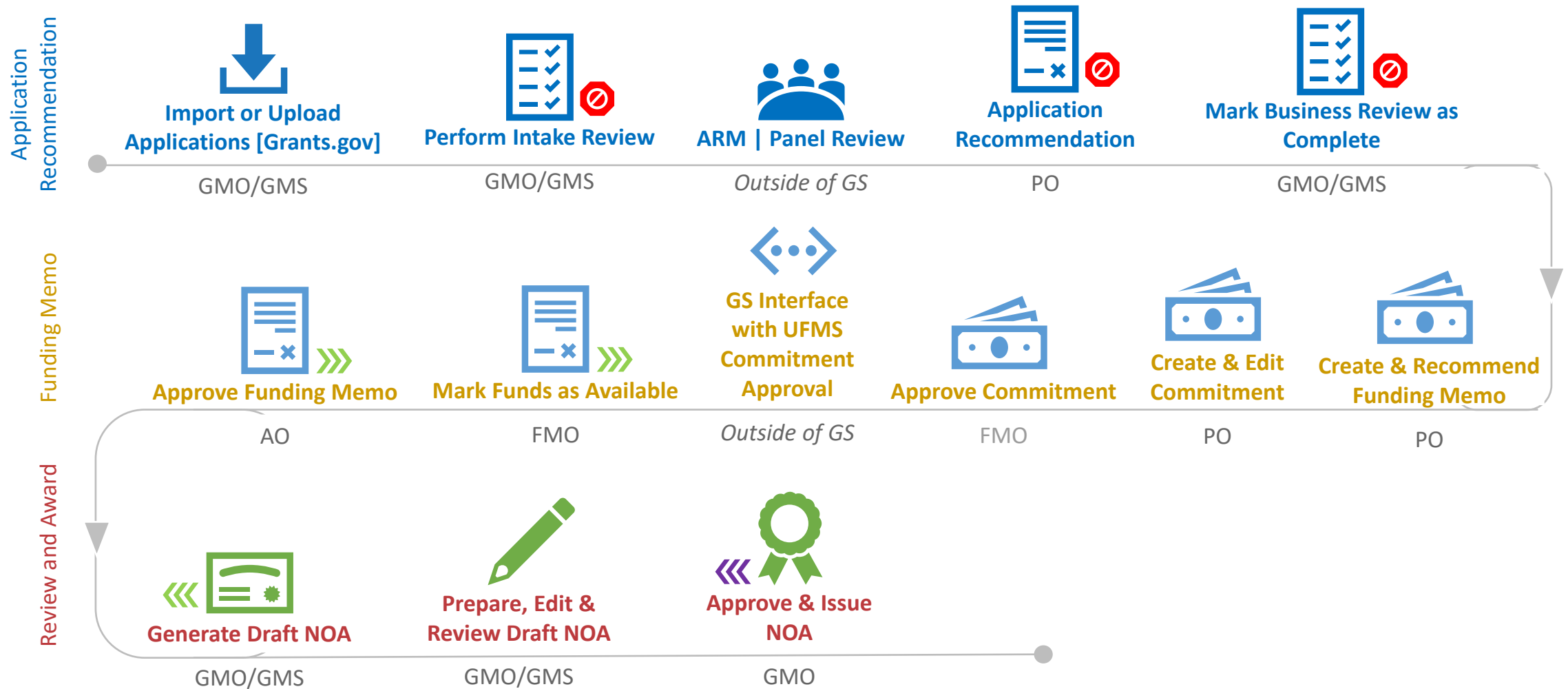- Final Q & A
- Resources

Introduction

This course provides instructions on how to walk back draft awards and amendments to an earlier stage in the process.

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Introduction: New Competitive Award Workflow

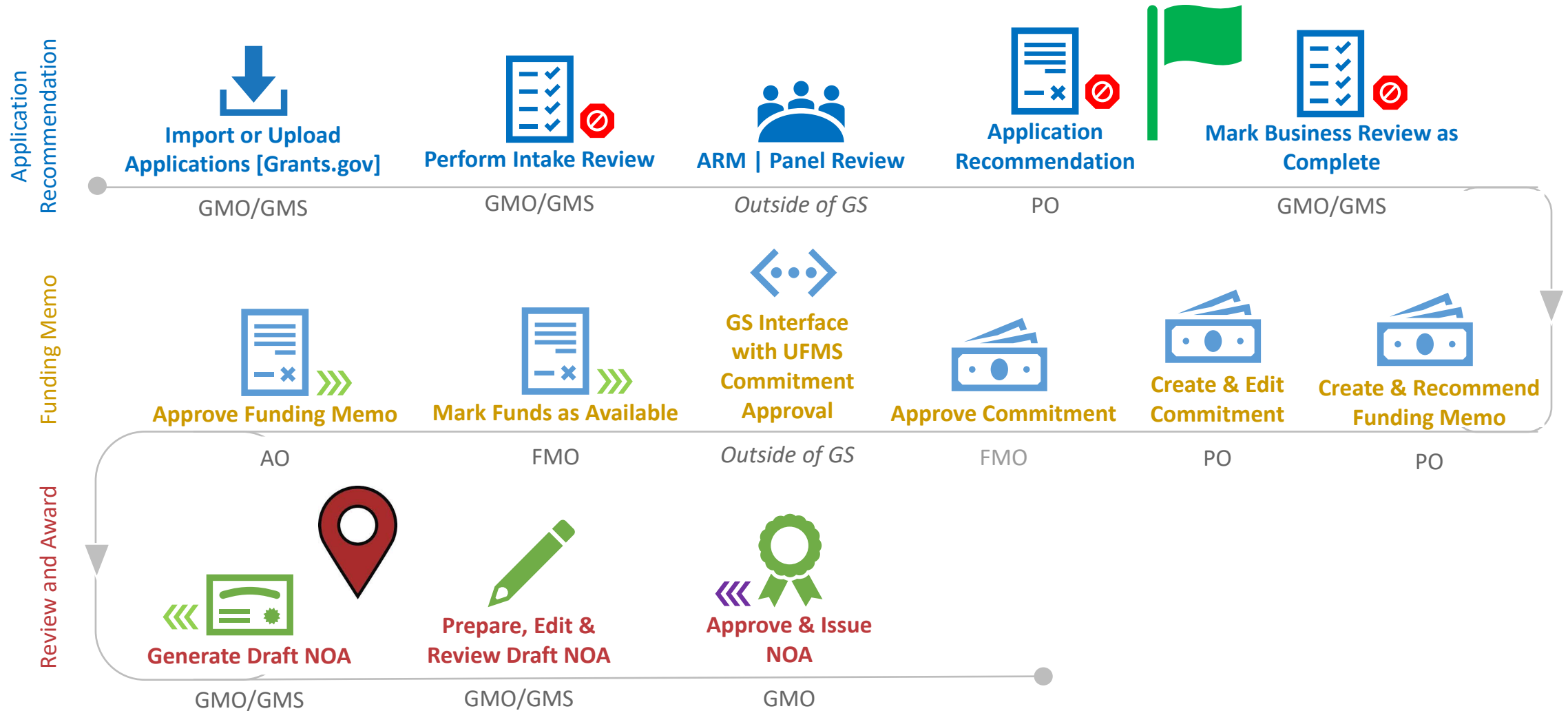# WALKING BACK A NEW DRAFT AWARD

Scenario 1: Walking back a New Draft Award to the Application Recommendation screen

You Are Here

- The Grants Management Officer:
    - Generated the Draft Notice of Award (NOA) and realized the amount on the Funding Memo needs to be changed

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Introduction: New Competitive Award Workflow

Application Recommendation

- **Import or Upload Applications [Grants.gov]** — GMO/GMS
- **Perform Intake Review** — GMO/GMS
- **ARM | Panel Review** — *Outside of GS*
- **Application Recommendation** — PO
- **Mark Business Review as Complete** — GMO/GMS

Funding Memo

- **Approve Funding Memo** — AO
- **Mark Funds as Available** — FMO
- **GS Interface with UFMS Commitment Approval** — *Outside of GS*
- **Approve Commitment** — FMO
- **Create & Edit Commitment** — PO
- **Create & Recommend Funding Memo** — PO

Review and Award

- **Generate Draft NOA** — GMO/GMS
- **Prepare, Edit & Review Draft NOA** — GMO/GMS
- **Approve & Issue NOA** — GMO

Option to disapprove. This stops the process.

Option to return Funding Memo to draft.

Option to return NOA to draft.

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Steps to Walking back

Delete the Draft Notice of Award (NOA) (GMS/GMO)

Reject the Funding Memo (PAO)

Create & Delete the Funding Memo (PO)

Change Application Recommendation (PO)

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Delete the Draft NOA

Delete the Draft NOA

Award Overview

Organization:			
Project Title:			
UEI:		DUNS:	
CCR EIN:			
Grant Number:		Approved Amount:	$100.00
Amendment Number:	0	Funds Restricted:	No
Budget period Number:	1	Project Period:	01/01/2024 - 12/31/2027
FAIN:		Budget Period:	01/01/2024 - 12/31/2024
Application Number:		Application Type:	New
Workflow Status:	Drafted	Last Updated By/Date:	

Award Preparation

Edit/Validate Organization
Select Org Address
Project Assignments
Budget Worksheet
Terms and Conditions
Funding Restrictions
Manage Commitments

Award Actions

Ready for Review
Change Type to Replacement
Delete Notice of Award

Award Information

Application
Award Workflow History
Next Workflow Actions
Funding Memo
Award Summary
View/Print Notice Of Award
Recipient Data Insights

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Reject the Funding Memo

Create & Delete the Funding Memo

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Change the Application Recommendation

Notifications

The roles that receive the notification as follows:

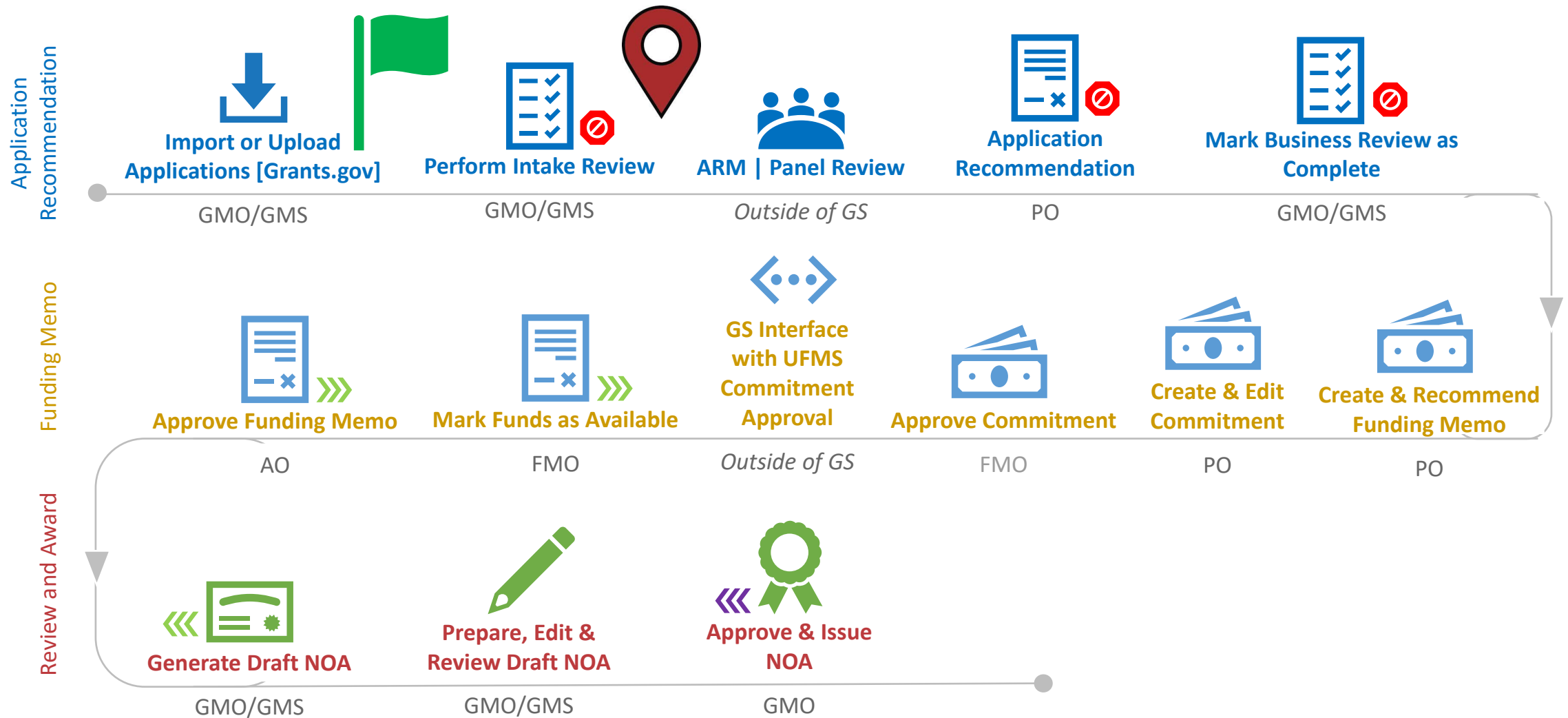| Action	Role
Reject the Funding Memo	Roles in the workflow that acted after the Funding Memo draft status. These may include PO, PC, OD, and PAO
Delete the Funding Memo	No notification
Change Amount(s) on the Application Recommendation	No notification

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Scenario 2: Withdraw a New Application from the Review Process

You Are Here

- The Grants Management Officer:
  - Completed the Intake Review and realized that this application should not move forward in the new award process

New Competitive Award Workflow

Application Recommendation

Import or Upload Applications [Grants.gov]	Perform Intake Review	ARM | Panel Review	Application Recommendation	Mark Business Review as Complete
GMO/GMS	GMO/GMS	*Outside of GS*	PO	GMO/GMS

Funding Memo

Approve Funding Memo	Mark Funds as Available	GS Interface with UFMS Commitment Approval	Approve Commitment	Create & Edit Commitment	Create & Recommend Funding Memo
AO	FMO	*Outside of GS*	FMO	PO	PO

Review and Award

Generate Draft NOA	Prepare, Edit & Review Draft NOA	Approve & Issue NOA
GMO/GMS	GMO/GMS	GMO

Option to disapprove. This stops the process.   Option to return Funding Memo to draft.   Option to return NOA to draft.

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Withdraw Review

Withdraw Review

Notifications

The roles that receive the notification as follows:

Action	Role
Withdraw Review	GMO actively assigned to the project

WALKING BACK AN AMENDMENT

Amendment Workflow with Funding Memo

Scenario 3: Uncomplete an Amendment Application

You are here

- The Grants Management Officer:
  - Generated the Draft NOA for an Amendment initiated by grantor. The GMO realizes that the amount entered on the SF-424A is incorrect.

Steps to Uncompleting an Amendment Application

Delete the Draft NOA (GMS/GMO) → Reject the Funding Memo (PAO) → Delete the Funding Memo (PO) → Uncomplete the Amendment Application (GSM/GMO)

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Amendment Workflow with Funding Memo

Delete the Draft NOA

Reject the Funding Memo

Delete the Funding Memo

Uncomplete the Amendment Application

Notifications

The roles that receive the notification

Action	Role
Reject the Funding Memo	Roles in the workflow that acted after the Funding Memo draft status. These may include PO, PC, OD, DAO and PAO
Delete the Funding Memo	No notification
Uncomplete an Amendment Application	GMO actively assigned to the project

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Optional: Delete an Amendment

- With Federal staff-initiated amendments, there is also the option to delete an amendment if, for example, the wrong amendment was chosen.

- The amendment application can be deleted in the Received (Post Award Paper Submission) status (by both the GMO and GMS) and in the Complete (Post Award) status (by only the GMO).

Optional: Disapprove an Amendment

- With Recipient and Federal initiated amendments, there is also the option to disapprove an amendment application

- The amendment application must be in the Complete (Post Award) status and can be done by GMO, GMS

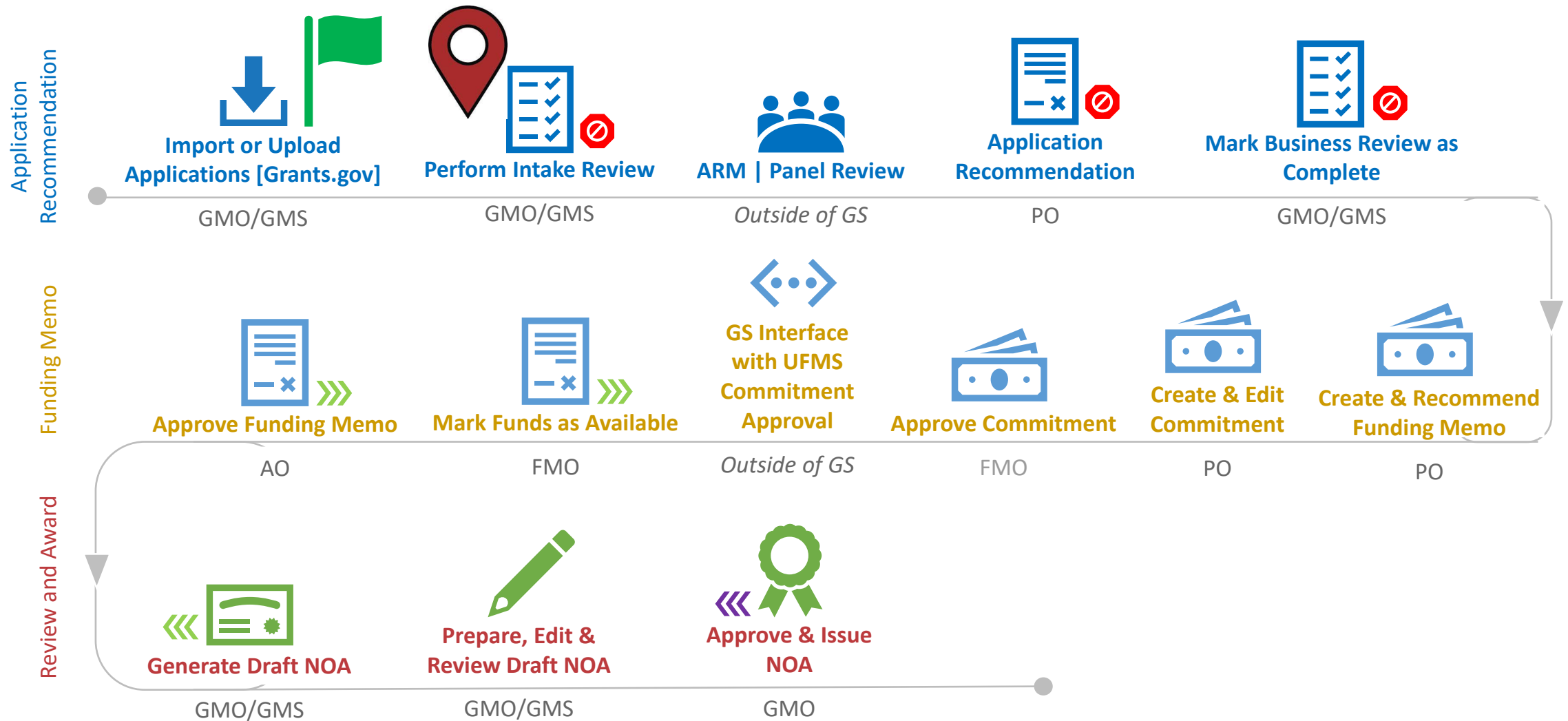- A record of this disapproval can be found on the (Grant) History screen

Scenario 4: Return an Application

You Are Here

- The Recipient:
  - The recipient submitted an application. Review application and determine if the Recipient needs to make changes

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New Competitive Award Workflow

Application Recommendation

Import or Upload Applications [Grants.gov]
GMO/GMS

Perform Intake Review
GMO/GMS

ARM | Panel Review
Outside of GS

Application Recommendation
PO

Mark Business Review as Complete
GMO/GMS

Funding Memo

Approve Funding Memo
AO

Mark Funds as Available
FMO

GS Interface with UFMS Commitment Approval
Outside of GS

Approve Commitment
FMO

Create & Edit Commitment
PO

Create & Recommend Funding Memo
PO

Review and Award

Generate Draft NOA
GMO/GMS

Prepare, Edit & Review Draft NOA
GMO/GMS

Approve & Issue NOA
GMO

Option to disapprove. This stops the process.

Option to return Funding Memo to draft.

Option to return NOA to draft.

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Return an Application

Monetary Amendment Approval

Funding Memo

- Create & Submit Amendment
- Verify Draft Amendment
- Bypass Funding Memo

Review and Issue

- Approve & Issue Amendment
- Prepare, Edit & Review Draft Amendment
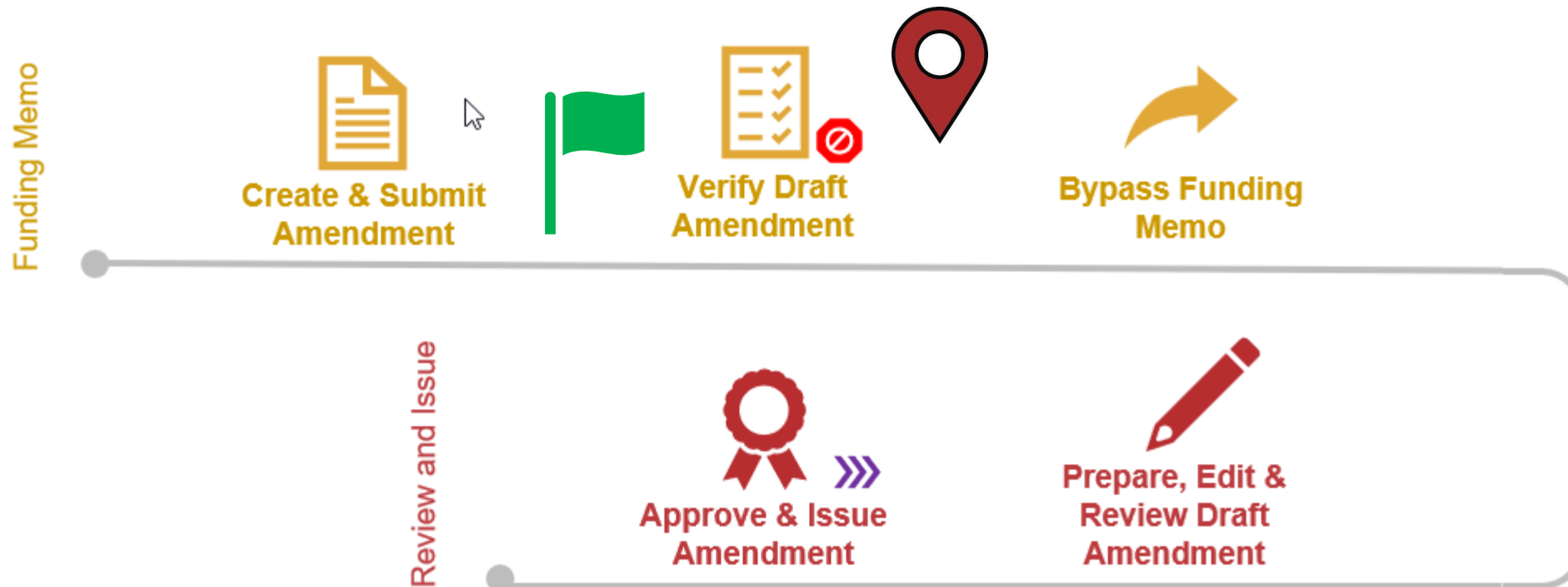
🚫 Option to Stop the process.   ⟫ Option to return Amendment to draft.

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Notifications

The roles that receive the notification

Action	Role
Review the Recipient initiated Application	No notification Note: It is recommended that grantors leverage BI dashboards.
Return the Application	Roles assigned to the project. These may include GMO, GMS, PO, PC, OD, DAO, PAO

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Questions?

Resources

- Quick Sheet Return Directed Supplements or Competitive Applications

- Quick Sheet Disapprove, Delete, or Return an Amendment with a Draft NOA

- Funding Memo Approval/Rejection