Grants Management & Federal Program Office

Supplementary Information, Correspondence and Federal Reports

NOAA Grants Online Program Management Office

December 2018
Version 4.26

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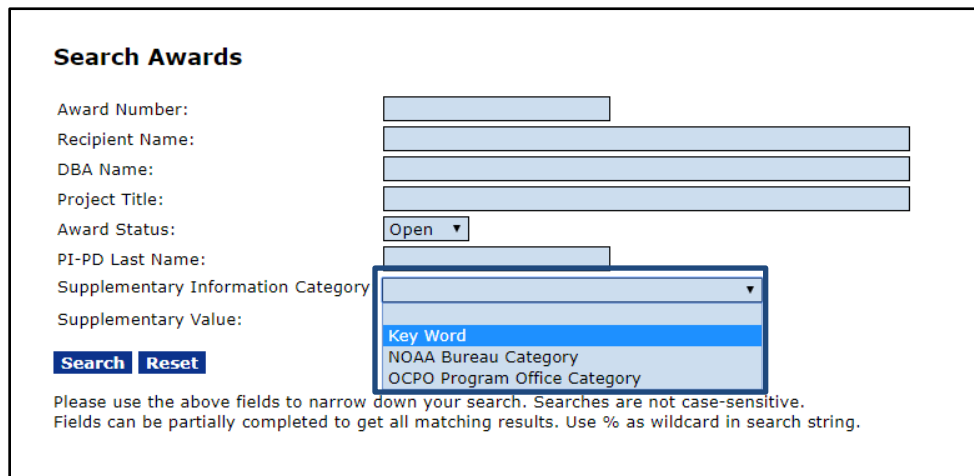
Another Program Office (e.g., NOAA Fisheries SE Region) may also be involved in fisheries management. That Program Office may opt to also create a Fish Species category. For this Program Office, the values that might be included in the Fish Species are: Goliath Grouper, Red Snapper, and Rock Shrimp.

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.

Search Awards

Award Number:	
Recipient Name:	
DBA Name:	
Project Title:	
Award Status:	Open ▾
PI-PD Last Name:	
Supplementary Information Category	▾
Supplementary Value:	Key Word
	NOAA Bureau Category
	OCPO Program Office Category

Search **Reset**

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.

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

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.

5. 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:	Open ▾
PI-PD Last Name:	
Supplementary Information Category:	Key Word ▾
Supplementary Value:	Regulations

Search **Reset**

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

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.

4. The Supplementary Information details page is displayed.

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.

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

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

8. 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**.

2. 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.

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.

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.

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

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

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: *   Memo for Record ▼
Date or Start Date: *   06/01/2018   End Date:
Title or Subject: *   Memo for documentation

Comments:

                                            Spell Check
Created By:

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 sho
Large File Guidance

Type: *   Memo for Record ▼
Date or Start Date: *   06/01/2018   End Date:
Title or Subject: *   Memo for documentation

Comments:

                                            Spell Check
Created By: Ana Holt

Save   Lock   Cancel

Run Report

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

8. 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.

9. 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.