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# Introduction

## Welcome to the OEA Grants Portal!

The OEA Grants Portal (often referred to as EADS II) is designed to improve management of projects and grants from inception to closure. The portal is built using SmartSimple's GMS360° platform, an industry leading information management software that provides support to major grant and research institutions in North America and Europe.

## OEA Grants Portal Benefits

The OEA Grants Portal provides:

- A seamless interface for improved collaboration between OEA and the grantee community.
- Improved overall user experience so that time and resources are freed from mundane, repetitive tasks.
- Improved service delivery.
- Improved interface with access to all of the forms needed to complete the application process, request amendments, and submit deliverables and reports.



Tips for navigating the OEA Grants Portal can be found in the Appendices (K). Note that when completing tasks inside the portal, the user will sometimes need to click **Home** or the OEA logo to get back to the main page.

### NOTE:

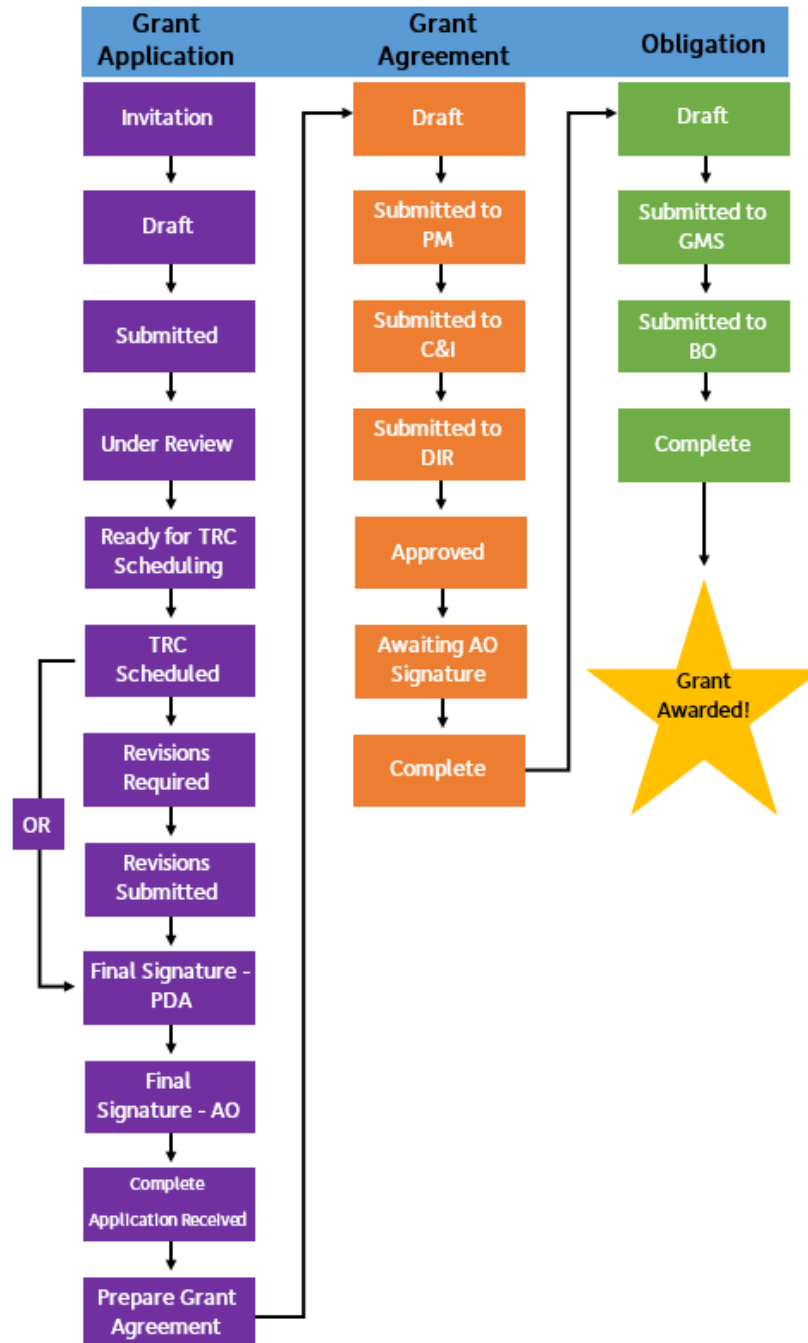
*Community users are “applicants” until a grant is awarded, then they become “grantees.”*



## Grant Workflow

The flowchart below illustrates the steps involved (from both OEA and the applicant/grantee) in submitting a grant application, completing a Grant Agreement, and completing an obligation.

Refer to this flowchart when moving from step to step in the grant process. Note that items such as reports and closeouts are not on this flowchart.





## Home Page

The user interface displays activities that are assigned to the community. Community Contacts (CC) and Authorizing Officials (AO) will both see the same view.

The portal includes the following features:

- Grant applications and grant activities displayed as tabs.
- Tabs organized in a chronological order to follow the community process between grant application, grant award, and grant activities.
- Quick access links to the OEA website and payment forms.
- Quick access links for viewing PDFs of submitted applications or a Grant Agreement.

## Main Menu

The user will see the image below on their home page after logging into the OEA Grants Portal as a first time applicant or a returning grantee. The main menu has three tabs in the upper left corner: **Home**, **www.oea.gov**, and **Payment Forms**.



## Home/Grants Management Menu

Clicking the first tab, **Home**, will return the grantee to the main screen as they are navigating the portal. Clicking the OEA logo in the top left also returns the user to the main screen. The **Grants Management** menu has seven (7) tabs containing the applications, grants, and activities assigned to the user. Further breakdowns of each tab are in their respective sections of this manual.

- Proposed Grants Tab (B)
- Awarded Grants Tab (C)
- Grant Agreements & Closeouts Tab (D)
- Grant Reports Tab (E)
- Grant Amendments Tab (F)
- Grant Deliverables Tab (G)
- Kick Off Meetings Tab (H)



***www.oea.gov***

The second tab, **www.oea.gov**, links directly to the OEA homepage by opening in a new tab or window, depending on the web browser.

### ***Payment Forms***

The third and final tab, **Payment Forms**, will open the screen below. Clicking an icon will bring up one of three blank Payment Forms: SF 270, SF 271, and SF 3881. The forms will open up within the OEA window.

Click **Payment Forms** in the main menu to go back to the screen with all three forms listed.

**Instructions**

These forms are provided for your convenience only. The OEA Grants System DOES NOT accept payment information. Please download and complete the forms as needed and submit to OEA payment mailbox as directed by your Project Manager.

**PAYMENT FORMS**

SF 270      SF 271      SF 3881

### ***NOTE:***

*A grantee must have a SF 3881 on file with OEA before any payment request can be processed. Additionally, the bank account information entered on the SF 3881 MUST MATCH what the grantee organization has entered in the System for Award Management (SAM.gov). If the bank account information does not match, the payment will be returned and will cause a delay.*





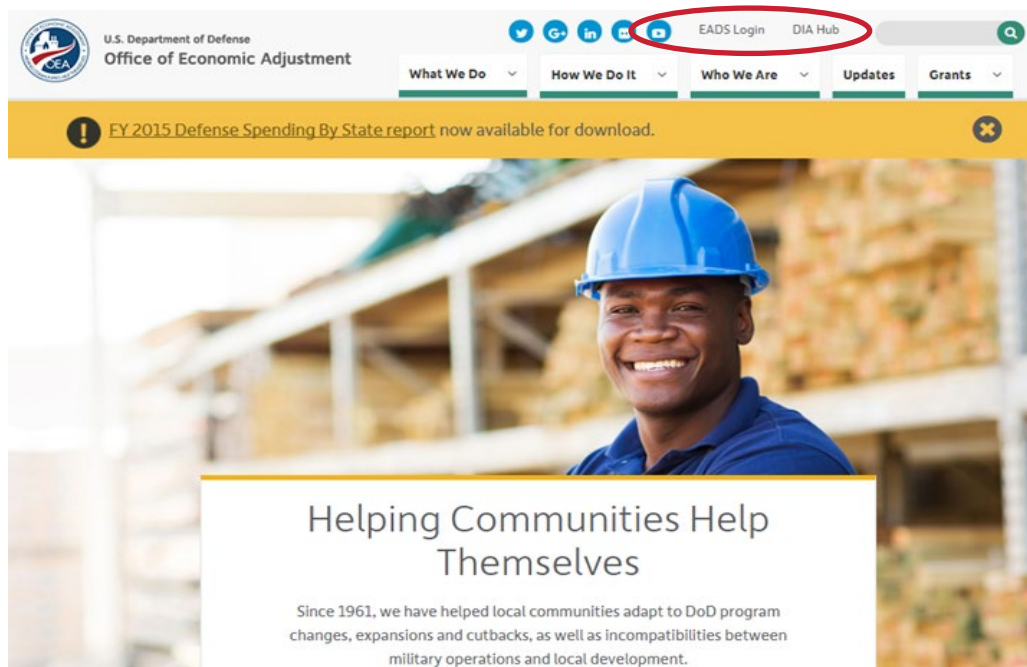
# Login & Password

## OEA Grants Portal

The OEA Grants Portal only requires a user name and password to authenticate and allow access to the system. Passwords must be changed before the first log in and every 60 days.

Community users (Authorizing Official, Primary Delegated Authority, Community Contact) must first be added to the system by OEA staff before they can access the OEA Grants Portal. Once users are successfully in the system, the OEA Grants Portal can be accessed one of two ways:

1. Open a new internet browser and enter: <https://oeagrants.osd.mil>
2. Select the EADS login link on the top right of the OEA homepage: <http://www.oea.gov>



### NOTE:

*OEA Grants Portal can be accessed in all major web browsers: Chrome, Firefox, and Internet Explorer. Chrome and Firefox are recommended as IE blocks some images and icons in the portal.*



## Community Roles

Access and edit rights in the OEA Grants Portal are defined by the role a user is assigned. Access to the OEA Grants Portal is controlled via username and password to ensure only authorized users are performing certain actions at given times.

Users CANNOT be assigned multiple roles or the workflow will be interrupted. For example, a user assigned the roles of AO and CC will not be able to see the AO's buttons as the system defaults to the lowest permission.

- **Authorizing Official (AO)**
  - The Authorizing Official role is given to the community user who is ultimately responsible for the overall grant.
  - There can be only one AO for a community at any given time.
  - The AO must have the legal authority to enter into financial agreements on behalf of the organization.
  - The AO is the only user with rights to sign the documents to receive any agreed upon funding.
  - The AO has the authority to sign and approve grant applications as well as amendments, Final Performance, and Federal Financial Reports on behalf of the organization.
- **Primary Delegated Authority (PDA)**
  - The PDA is a specific Community Contact who is responsible for completing the application, any requested application revisions, and performing the day-to-day actions (including reports) once a grant has been awarded.
  - The PDA is the counterpart to the PM on the community side.
  - The term "Delegated Authority" means that they are entrusted by the AO to complete actions with respect to OEA grants on behalf of the community.
  - An organization can have more than one person with the role of Delegated Authority, but only one "Primary" DA at any given time.
- **Community Contact (CC)**
  - The Community Contact role is given to all users on the community side who are authorized by the AO to work on a grant or application.
  - All Community Contacts must be approved by the OEA Project Manager and added to the grant before access is granted.

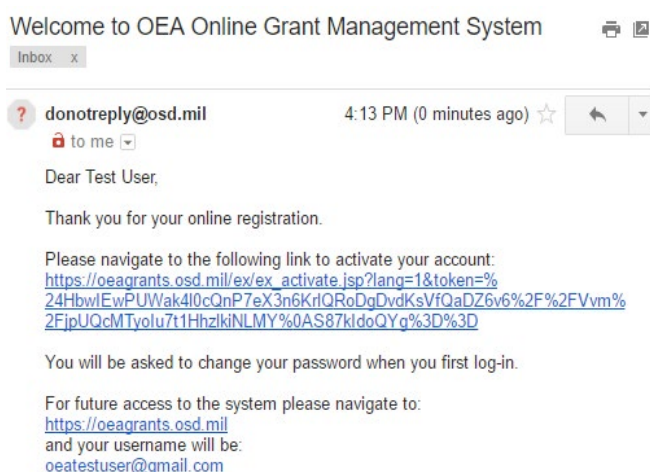


## Initial Login

The OEA Project Manager (PM) assigned to the community organization will add community users as contacts. Once PM's part is complete, the community user will receive an email to complete the steps below.

### Community User Completes Registration

1. Open the email with the temporary password. **Click on the long link in the email instead of going directly to the portal.**
  - a. This link is only good for one use. Once the account is set up following the instructions below, the user should navigate directly to the portal to log in.



2. The system will present a reCAPTCHA authentication and ask the user to set a unique password.
  - a. The purpose of a reCAPTCHA is to validate the user is a real person.

### Password Policy

*When making a new password, keep in mind that the Department of Defense (DoD) mandates that all passwords adhere to the following rules:*

- At least one uppercase letter
- At least one lowercase letter
- At least one special character (!@#\$\$%^&\*)
- At least one number
- Have a minimum of 15 characters
- Passwords must be changed every 60 days
- Password cannot be one that was previously used



3. Click the box next to “I’m not a robot” then click **Submit**.

**SmartSimple Account Activation**

New Password:

Confirm Password:

Policy: Minimum Characters - 15  
1 of each of the following character sets: - Upper-case - Lower-case - Numbers - Special characters (e.g. ~ ! @ # \$ % ^ & \* ( ) \_ + = - [ ] / ? > < )

☐ I'm not a robot

reCAPTCHA  
Privacy - Terms

**Submit**

4. The reCAPTCHA will appear. Follow the directions to select the correct squares.



5. After the reCAPTCHA is completed, the OEA Grants Portal will appear.

Organization Profile Training Emilee Grantee

Home www.oea.gov Payment Forms

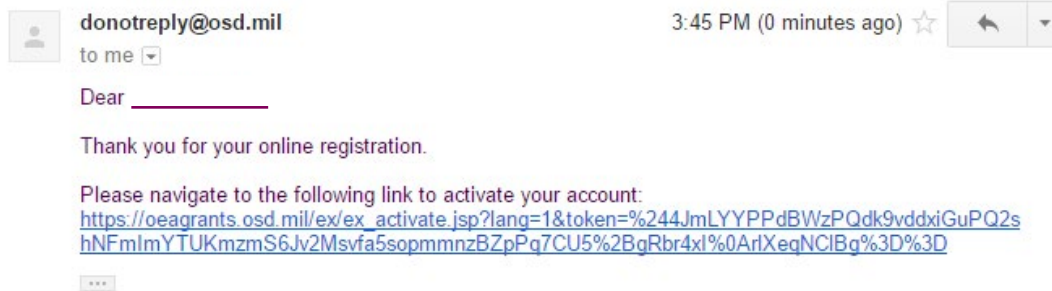
**Grants Management**

PROPOSED GRANTS (1) **AWARDED GRANTS** GRANT AGREEMENTS & CLOSEOUT (17) GRANT REPORTS (78) GRANT AMENDMENTS GRANT DELIVERABLES (17) KICK OFF

#	Organization Name	Grant Title	Title of Applicant Project	Grant Number	FAIN	Project Manager	Status	Amount Approved	Grant Application PDF	Actions
1	Test Organization	Test Grant	Test Grant	SCON826-18-01	HQ00051810000	Emilee Projectmanager	Grant Awarded	\$10,000.00	Open	Open




- The email notification below will be sent to the applicant once they are logged in. The link included activates the user's account.



## Returning Users

Once the community user has been successfully added to the system, they can continue to access the system by following the steps below.

- Click on the link from the oea.gov homepage or type in the URL (<http://oeagrants.osd.mil>).
- Read the conditions and click the check box next to **“I have read & consent to terms in IS user agreement.”** The login fields will then appear.



U.S. DEPARTMENT OF DEFENSE

OEA Grants Management System

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG-authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests—not for privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or privileged communications, or work product, related to personal representation or services by attorneys, psycl their assistants. Such communications and work product are private and confidential. See User Agreement for

☐ I have read & consent to terms in IS user agreement.

### Login

Email:

Password:

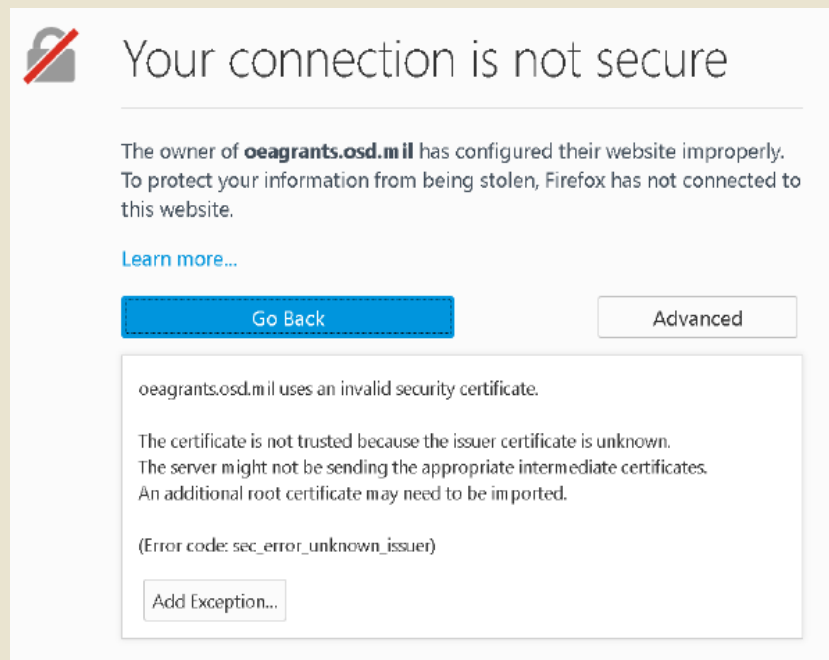
[Forgot Password?](#)



## **CERTIFICATES AND ADVANCE SETTINGS:**

The OEA Grants Portal has a server certificate that was issued by DoD, not a publicly recognized certificate authority. For this reason, the browser will likely alert community users that they may be accessing a harmful site. The site is **not** harmful.

1. Most browsers will have a screen similar to the one below. Click on the **Advanced** button.
2. Click **Add Exception**.



3. Add "oeagrants.osd.mil" as an accepted site.
4. Community users should reach out to their internal IT department if this method doesn't solve the problem.
5. See Wikipedia ([https://en.wikipedia.org/wiki/Certificate\\_authority](https://en.wikipedia.org/wiki/Certificate_authority)) for more information.





## Password Help

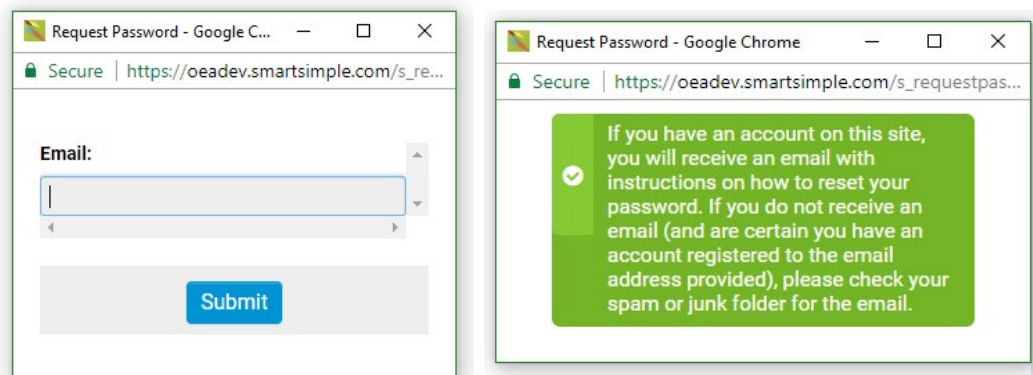
Community users can follow the directions below for passwords that need to be changed or were forgotten.

### NOTE:

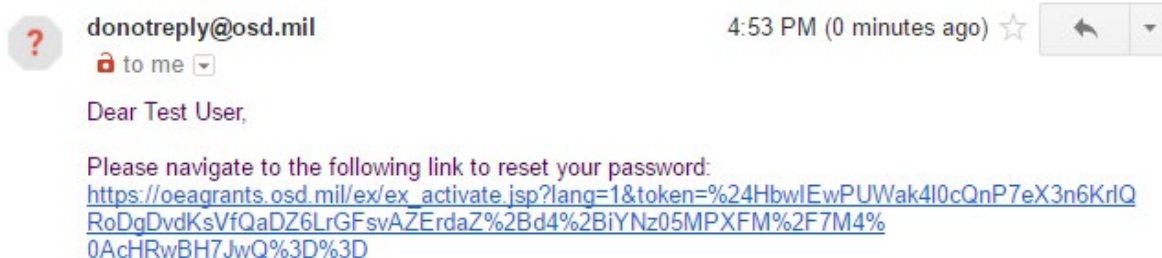
***NEVER provide password or account information to another individual. Doing so is a violation of DoD policy and could result in account suspension.***

## Forgotten Password

1. Go to the main login screen for the OEA Grants Portal and click on the **Forgot Password** link. A pop-up window will appear, requesting the user's email address.
2. Click **Submit**.
  - a. This will send an email with a link to reset the password.



3. Click on the long link in the body of the email.
  - a. This link is only good for one use.





4. At this point, another reCAPTCHA test is required.
5. Complete the test and follow the instructions on A-3 to create a new password.

### Changing Password

1. Passwords must be changed every 60 days or when reset by a Project Manager.
2. Enter the email associated with the account.
3. Enter the current password or the one that was provided when reset.
4. Enter the new password and confirm that it is correct.
5. Click **Submit**.
6. At this point, the user should be able to get back into the system.

Current Password:	<input type="password"/>
New Password:	<input type="password"/>
Confirm New Password:	<input type="password"/>
Policy:	Minimum Characters - 15 1 of each of the following character sets: - Upper-case - Lower-case - Numbers - Special characters (e.g. ~ ! @ # \$ % ^ & * ( ) _ + = - [ ] / ? > < )
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

### NOTE:

*For any of the following errors, the Community Contact should reach out to their Project Manager for assistance.*

1. *Applicant/grantee did not receive a password after clicking reset password link.*
2. *Applicant/grantee did not receive a password even after #1 was addressed.*
3. *Applicant/grantee received a password, but still can't log in.*
4. *The applicant/grantee used a different email than the one OEA used to create the account.*
5. *The applicant/grantee cannot access the portal. (First verify that certificates are allowed - page A-6).*
6. *The AO cannot see certain buttons.*

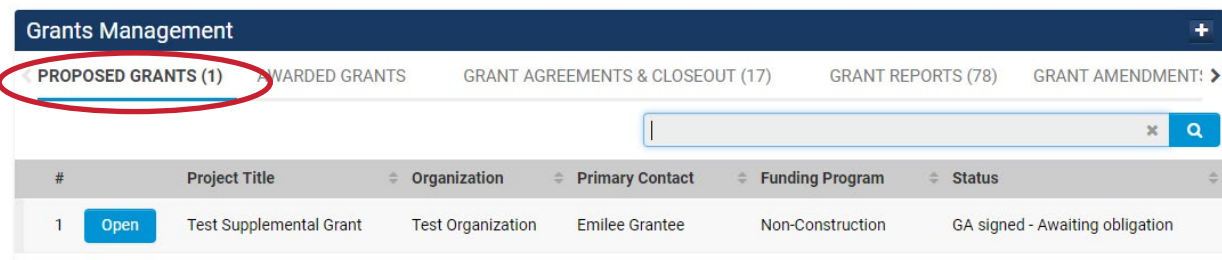




# Proposed Grants Tab

## Proposed Grants Layout

The **Proposed Grants** tab contains all grant applications that the grantee is working on or has submitted to OEA. This is where any changes or additions will be made if the Project Manager (PM) sends the application back during review. For any new grant applications, the grantee must be invited by the PM to submit an application (this includes supplemental grants).

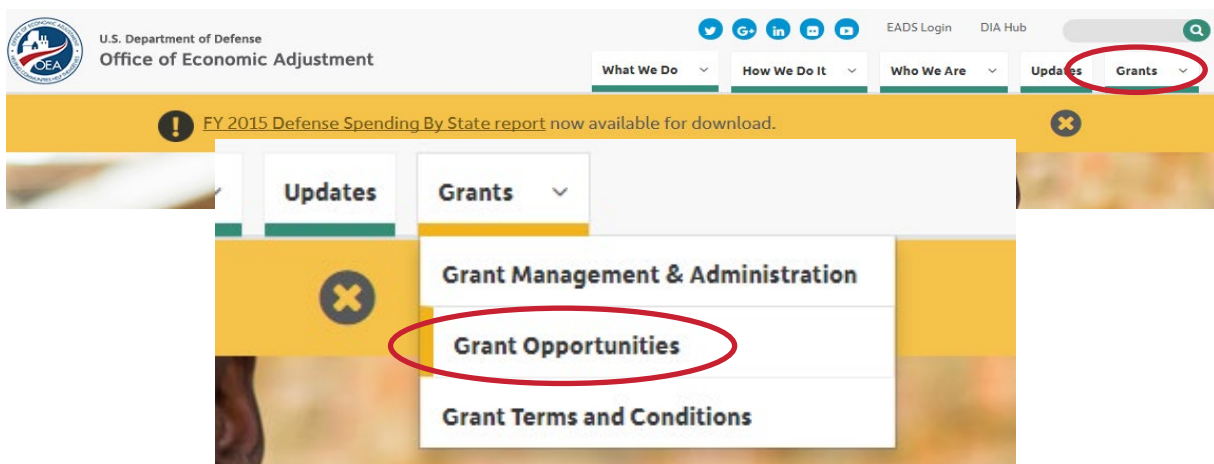


Grants Management						
◀ PROPOSED GRANTS (1) ▶ AWARDED GRANTS GRANT AGREEMENTS & CLOSEOUT (17) GRANT REPORTS (78) GRANT AMENDMENT: ▶						
<input type="text"/>						
#	Project Title	Organization	Primary Contact	Funding Program	Status	
1	Test Supplemental Grant	Test Organization	Emilee Grantee	Non-Construction	GA signed - Awaiting obligation	<a href="#">Open</a>

A grant is officially awarded when the Director approves a Grant Agreement, not an application. It is possible for a community to turn down an award after it has been approved by the Director. If the community's Authorizing Official does not return a signed Grant Agreement, no money will be obligated.

## Submitting an Inquiry

1. The applicant should go to the OEA homepage. In the **Grants** drop-down box in the upper right hand corner, select the **Grant Opportunities** option.





2. Select the correct program category for the grant opportunity.
  - a. If unsure of the Catalog of Federal Domestic Assistance (CFDA) number, visit the following website: <https://www.cfda.gov/>
  - b. CFDA also contains the requirements for each program.

Inquire about financial assistance opportunities available through OEA.

<p>Base Closure and Realignment Assistance</p> <p>Determine Eligibility</p>	<p>Defense Industry Adjustment Assistance</p> <p>Determine Eligibility</p>	<p>Compatible Use Assistance</p> <p>Determine Eligibility</p>
<p>Community Investment Assistance</p> <p>Determine Eligibility</p>	<p>Community Economic Adjustment Assistance</p> <p>Determine Eligibility</p>	

3. Once the applicant has finished completing the inquiry form (B-3), they should click **Submit**. All sections with a red asterisk must be completed.
4. Once the inquiry has been submitted, wait to hear back from OEA.
5. OEA will notify the applicant of their decision or if additional information is required.

**NOTE:**

*If the user is not already in the system, they would follow the steps to register on page A-3 once their inquiry has been approved.*



## Inquiry

\* Name [First, MI, Last]:

\* Work email address:

\* Phone Number [999-999-9999]:

\* Title:

\* Name of your organization:   
75 characters left

\* City:

\* Your inquiry most closely represents which of the following options

- Select One -

\* Which of the following options best describes your employer

- Select One -

\* Instrumentality of Government

- Select One -

\* Are you responding to a Federal Funding Opportunity? (FFO)

- ☐ Yes  
☐ No

\* OEA uses the Catalog of Federal Domestic Assistance (CFDA) for determining eligibility. Which CFDA number best applies to your case?

- ☐ 12.600 Community Investment  
☐ 12.604 Community Economic Adjustment  
☐ 12.607 Community Economic Adjustment Assistance for Establishment, Expansion, Realignment, or Closure of a Military Installation  
☐ 12.610 Community Economic Adjustment Assistance for Compatible Use and Joint Land Use Studies  
☐ 12.611 Community Economic Adjustment Assistance for Reductions in Defense Industry Employment  
☐ 12.614 Community Economic Adjustment Assistance for Advance Planning and Economic Diversification  
☐ 12.615 Research and Technical Assistance  
☐ 12.617 Economic Adjustment Assistance for State Governments  
☐ 12.618 Community Economic Adjustment Assistance for Establishment or Expansion of a Military Installation  
☐ I don't know

\* Briefly describe the DOD action that impacts your community and why you believe your case warrants further investigation by OEA

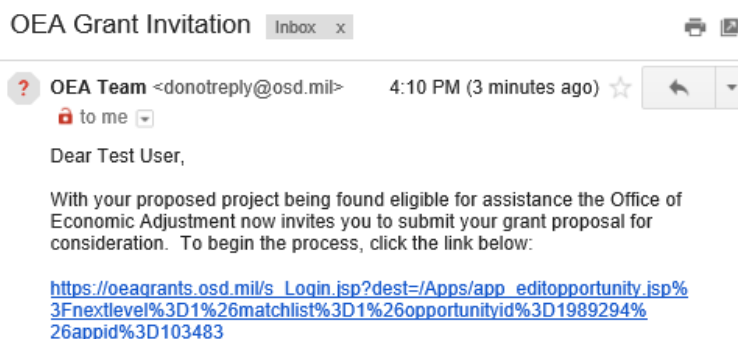
450 characters left

Submit



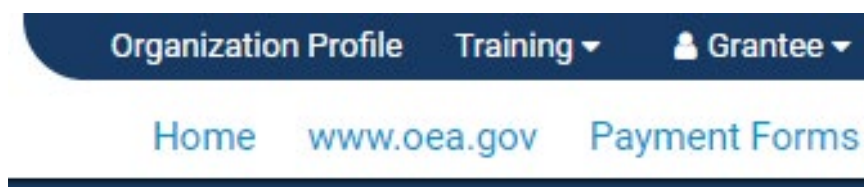
## Verify Organization Profile

Once OEA has completed their review of a grant inquiry and approved it, they will send an application invitation email to the PDA. The application will also show up under the **Proposed Grants** tab.



Before completing the grant application, the PDA should complete or verify their organization's profile by following the steps below.

1. Click the **Organization Profile** link located in the upper right hand corner of the screen.



2. The organization page will appear.



3. The **Main** tab has two sections for data entry. The top section contains basic location details, while the bottom section, **Administration**, is where the EIN and DUNS numbers can be found.
4. The **Contacts** tab contains a list of all contacts currently assigned to the organization. This tab cannot be edited by the community user. If contacts are out of date, contact the Project Manager.
5. Enter or verify the following information: Address, EIN Number, DUNS Number, and Legal Name.
  - a. When entering the address, be sure to enter all nine digits of the zip code.
6. These details must match what's entered in System for Award Management ([www.SAM.gov](http://www.SAM.gov)) or OEA will be unable to process the award.



## Filling Out an Application

The following instructions give detailed steps for an existing grantee or new applicant to follow when filling out a new grant application.

1. Under **Proposed Grants**, click **Open** next to the desired application.
  - a. The grant application will be in “Draft” status.

Grants Management						
PROPOSED GRANTS (1)    AWARDED GRANTS    GRANT AGREEMENTS & CLOSEOUT (14)    GRANT REPORTS (50)    GRANT AMENDMENTS    GRANT DELIVERABLES (12)    KICK OFF MEETINGS						
<div> <input type="text"/> <input type="button" value="X"/> <input type="button" value="Q"/> </div>						
#	Project Title	Organization	Primary Contact	Funding Program	Status	
1	Test Grant	Test Organization	Emilee Grantee	Non-Construction	Draft	<input type="button" value="Open"/>

2. There are four tabs to complete for the grant application. Each tab must be completed in order to submit the application to OEA for review. The tabs are **Application (SF 424)**, **Application Narrative**, **Budget**, and **Assurances and Certifications**, all located under the **Main** tab.
  - a. The **Contacts** tab is managed by the Project Manager. If the users that the PM assigned to the application are wrong, contact the PM with details on what should be updated.

## Main Details

The basic application details will be on the top half of the **Main** tab.

1. Review each item and verify the information is correct. The sections with a red asterisk are required fields.

Main  
 Notes  
 Contacts  
 More...

### Test Supplemental Grant

Grant Type: Non-Construction
 

\* Grant Title:

\* Organization Name: Test Organization
 

\* Primary Delegated Authority:

\* Project Manager: Emilee Projectmanager
 

Status:

AO Name: Emilee Authorizingofficial

Is this a Supplemental Application?:

Associated Grants: Test Grant SCON826-18-01 - Test Organization - HQ00051810000 - \$5,000.00
 

Project Name:

Project Type: Establishment or Expansion
 

Project Number:

Finances:

Grant Preview:

Grant Number: EX826-18-03 ?

FAIN: HQ00051810001 ?

< APPLICATION (SF 424)    APPLICATION NARRATIVE    BUDGET    ASSURANCES AND CERTIFICATIONS



2. Click **Open** next to **Grant Preview** to see a preview of the grant application.
  - a. This window will have the option to export in PDF.

## Application (SF 424)

1. Enter required information into the **Application (SF 424)** tab. Sections with a red asterisk are the only ones required by the system, but some grants may need more sections completed.

**APPLICATION (SF 424)** APPLICATION NARRATIVE BUDGET ASSURANCES AND CERTIFICATIONS

This section of the application builds the Standard Form (SF) 424-Application for Federal Assistance. For additional instructions, visit <http://www.grants.gov/web/grants/form-instructions/sf-424-instructions.html>

\* Type of Submission: ☐ Preapplication ☒ Application ☐ Changed/Corrected Application

\* Type of Application: ☒ New ☐ Continuation ☐ Revision ☐ Other

**State Use Only**

Date Received by State:

**Applicant Information**

\* Catalog of Federal Domestic Assistance Number:

\* Proposed Start Date:  \* Proposed End Date:

Funding Opportunity Number:  Funding Opportunity Title:

Competition Identification Number:  Competition Title:

Areas Affected by Project (Cities, Counties, States, etc.)

\* Descriptive Title of Applicant's Project

\* Type of Applicant:

**Estimated Funding(\$)**

\* Federal:  specified in agency instructions.

\* Applicant:

\* State:

\* Local:

\* Other:

\* Program Income:

\* Total: \$0.00

Congressional District of the Program/Project:

Is Application Subject to Review By State Under Executive Order 12372 Process?

☐ Check to see if your organization is covered by E.O. 12372

☐ a. This application was made available to the State under the Executive Order 12372 Process for review on

☐ b. Program is subject to E.O. 12372 but has not been selected by the State for review.

☐ c. Program is not covered by E.O. 12372.

Is the Applicant Delinquent on Any Federal Debt? (If "Yes," provide explanation in attachment.)

☐ Yes

☐ No

\*\* The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement.





2. The following list contains further details on what information each section needs. Hovering over section titles will also show additional information.

▪ **Type of Submission**

- The default is set to Application.

▪ **Type of Application**

- The default is set to New.
- If it's a supplemental grant, select **Continuation**.

▪ **State Use Only**

- Only enter information if it applies for this particular grant.

▪ **Applicant Information**

- Catalog of Federal Domestic Assistance Number
- Proposed Start Date and Proposed End Date
- Funding Opportunity Number
- Funding Opportunity Title
- Competition Identification Number
- Competition Title
- Areas Affected by Project
- Descriptive Title of Applicant's Project
  - Enter the chosen title for the grant.
- Type of Applicant
- Congressional District of Applicant
  - Grants can cross several districts.
  - Grantees can choose more than one district.
- Congressional District of the Program/Project

▪ **Estimated Funding**

- Funding Amounts
  - At this point, the system has no validations to ensure matching totals.
  - Enter funds requested from OEA in these fields: Federal, Applicant, State, Local, Other, and Program Income.
  - Enter "0" for the dollar amount if the amount is unknown. Otherwise, the system will not move forward.





- Click **Save Draft** for the system to add the total amount.
  - Is the applicant delinquent on any federal debt?
3. Once all information on the **Application (SF 424)** tab is complete, the following options will be available:
- a. **Save Draft** to ensure no work is lost and continue to **Application Narrative**. The user can also return later to continue working.
    - i. Once the application has been saved, it can only be deleted by a system administrator.
  - b. **Submit** once the SF 424 information is completed.

### Application Narrative

The **Application Narrative** tab is where the applicant describes the proposed project that the grant money will be used to fund and justifies the need for financial assistance. Also listed are key personnel, contractor services they intend on procuring, and any sub recipients the grant may require.

#### FSRS:

*If the applicant intends to have sub recipients, they will need to comply with additional requirements for reporting the use of federal funds. These can be found at the Federal Funding Accountability and Transparency Act Sub-award Reporting System (FSRS) at the following url: <https://www.fsrs.gov>. OEA cannot support grantees with the FSRS requirement at this time.*

The screenshot shows the 'APPLICATION NARRATIVE' tab selected in the top navigation bar. On the left is a dark blue sidebar with links: Main, Notes, Contacts, and More... The main content area has a header with tabs: APPLICATION (SF 424), APPLICATION NARRATIVE (active), BUDGET, and ASSURANCES AND CERTIFICATIONS. Below the tabs is a text area for the narrative, followed by a 'Key Personnel' section with a table for Name, Title, Email, and Resume Upload. A blue button 'Add or Remove Key Personnel' is below the table. The 'Contractor Services' section has a question 'Does this grant require use of contractor services?' with radio buttons for 'Yes' and 'No'.

APPLICATION (SF 424) APPLICATION NARRATIVE BUDGET ASSURANCES AND CERTIFICATIONS

Use this section to describe the proposed project and justify the need for financial assistance. The Narrative should include the following order: Application Abstract; Introduction/Background; Need for Assistance; Project Goals and Objectives Re or Benefits Expected; Approach & Timeline; and Deliverables/Products. Each section is limited to 1,000 words, unless otherwise charts, maps and other illustrative materials may be attached to further describe the proposal.

**Key Personnel**

(All resumes must be PDF)

Name	Title	Email	Resume Upload
------	-------	-------	---------------

Add or Remove Key Personnel

**\* Contractor Services**

Does this grant require use of contractor services?

☐ Yes

☐ No



### Adding Key Personnel

Key personnel are Community Contacts who are essential to the execution of the grant, but don't necessarily need access to the system.

1. Use the **Add** button to add additional personnel or click on the **X** button to remove them.

Key Personnel

(All resumes must be PDF)

Name	Title	Email	Resume Upload
<div>Add or Remove Key Personnel</div>			

### Adding Contractors

Contractors can be added by describing services if the exact company name is not known. If the exact start and end dates are unknown, enter the dates for the proposed project.

1. Use the **Add** button to add additional contractors or click on the **X** button to remove them.

\* Contractor Services

Does this grant require use of contractor services?

☒ Yes  
☐ No

Contractor Name	Description	Start Date	End Date
<div>Add Contractor</div>			

### Adding Sub Recipients

Details for sub award recipients can be added if necessary.

\* Sub Recipient

Do you anticipate awards to any sub recipients?

☐ No  
☒ Yes

\* Provide details of sub award recipients

---



### ***Adding Grant Deliverables***

A grant deliverable is a work product that can be measured or tracked. At the end of the grant, the grantee should be able to provide proof so OEA can verify the work was completed in accordance with the Grant Agreement.

1. Add the name, description, grant type, and estimated date for completion of the grant deliverables that are expected to be included on the grant. This includes expected work from the contractors listed.
2. Use the **Add** button to add additional deliverables or click on the **X** button to remove them.
  - a. **Clear** button will remove anything that hasn't been saved.

#### **Grant Deliverable List**

Name	Description
<div><div>Add Grant Deliverables</div><div>?</div></div>	

### ***Application Narrative Text Boxes***

The Application Narrative section has seven (7) text boxes for information entry. If no information is available, write "N/A" or "TBD" as the system requires text input.

- **Goals related to OEA mission instructions**
  - Enter the CAGE code here.
- **Grant Introduction/Background**
- **Need for Assistance**
- **Grant Abstract**
- **Results or Benefits Expected**
- **Approach and Timeline**
- **Scope of Work/Work Program**
  - Upload any necessary SOW documents by using the file uploader.



## Budget

The instructions below explain the process of completing a budget and contain an example of the calculations built into the system.

The financial information for the grant application will be entered into the **Budget** tab. The majority of the information will be in the **Budget Worksheet**, which can be found by clicking the **Open Budget** button. Note that the system does not verify if the Budget totals match.

### Budget Details

1. Navigate to the **Budget** tab on the grant application and enter the required information in the sections below:

- **Basis for the Indirect Cost Rate**

- If the organization does not have an indirect cost rate or is not claiming indirect costs for this grant, click the button for **No Indirect Cost**.

- **Indirect Cost Rate Percentage**

- If **No Indirect Cost** was selected in the previous section, enter “0.” There must be a number in order to submit later.

APPLICATION (SF 424) APPLICATION NARRATIVE **BUDGET** ASSURANCES AND CERTIFICATIONS

**Budget**

Click to open the form to fill budget worksheet and SF424A/C

**Open Budget**

\* Basis for the Indirect Cost Rate: ☐ Total Direct Cost  
☐ Modified Direct Cost  
☐ Salaries  
☐ Salaries and Fringe  
☐ De Minimis Modified Total Direct Cost  
☐ No Indirect Cost

\* Indirect Cost Rate Percentage:

Upload indirect cost rates for your community:

\* Is the Indirect Cost rate good for the life of the Grant?: ☐ Yes  
☐ No  
☐ N/A

- **Upload Indirect Cost Rates for Your Community**

- Use the **Lookup** button to attach the organization’s indirect cost rate policy.
- Upload must be a single PDF document, the system will reject Microsoft Word.

- **Is the Indirect Cost Rate good for the life of the grant?**

- If the organization does not have an indirect cost rate, select **N/A**.

**NOTE:**

*The indirect cost rate percentage is just for information and tracking purposes; it is not used to calculate the amount of indirect cost in the Budget Worksheet.*

2. Click **Save Draft**.

**Completing the Budget**

1. To open the budget activity, click on the **Open Budget** button.

**Budget**

Click to open the form to fill budget worksheet and SF424A/C

**Open Budget**

2. A pop-up warning will appear saying that this opens up the budget activity on a new page.
  - a. Be sure to click **Save Draft** for any recently input information.
3. Click **OK** to move to the budget activity. The budget page will appear.

Click the button to view the instructions that explains how to fill out this section

**Instructions**

**Budget Worksheet**

**Open**

**Salary and Fringe**

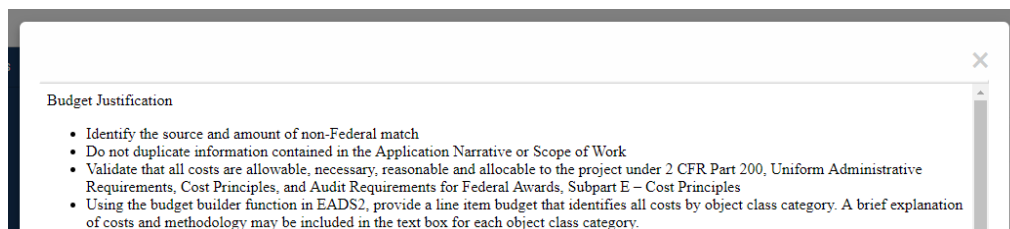
**Total Personnel**

**Travel**

4. Click the blue **Instructions** button to see detailed instructions on completing the budget and the accompanying budget justification.
  - a. The applicant should read the instructions thoroughly before the budget is completed.



- b. For further guidance on filling out the budget, work with the assigned OEA Project Manager.



5. Click **Open** under **Budget Worksheet** to open the worksheet in a separate pop-up window.

### *Budget Worksheet for Non-Construction Grants*

The **Budget Worksheet** for non-construction grants maps to the object class categories (Travel, Supplies, Contractual, etc.) of the SF 424A.

1. Open the worksheet by following the instructions under **Complete the Budget** on B-13.

**Grant Budget**

Grant Title: Test Grant

Applicant Organization: Test Organization

Request Number: NC2018-1339

Notes: Emilee Grantee, include revenues and expenses for *only* this project proposal. If a line item below does not apply to your proposal, leave it blank.

**Salary and Fringe**

Position	Grant Cycle Salary	FTE (%)	OEA Funds	Nonfed FTE (%)	Non-Federal Funds	Grant Cycle Fringe	OEA Fringe	Non-Federal Fringe	Total Salary
	\$0.00	0%	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

2. Enter information in each section.
  - a. Some sections can have multiple entries. Click the **add** button to add new rows under that category.
  - b. To delete a line item, click the **delete** button to the right of the line.



3. The **Salary and Fringe** section uses specific calculations. See instructions and the example below.

Salary and Fringe											
Position	Grant Cycle Salary	FTE (%)	OEA Funds	Nonfed FTE (%)	Non-Federal Funds	Grant Cycle Fringe	OEA Fringe	Non-Federal Fringe	Total Salary	Total Fringe	Total
Owner	\$150,000.00	50%	\$75,000.00	35%	\$52,500.00	\$100,000.00	\$50,000.00	\$35,000.00	\$127,500.00	\$85,000.00	\$212,500.00
Manager	\$100,000.00	45%	\$45,000.00	35%	\$35,000.00	\$70,000.00	\$31,500.00	\$24,500.00	\$80,000.00	\$56,000.00	\$136,000.00
	\$250,000.00	95%	\$120,000.00	70%	\$87,500.00	\$170,000.00	\$81,500.00	\$59,500.00	\$207,500.00	\$141,000.00	\$348,500.00

- Position:** Enter the individual's position.
- Grant Cycle Salary:** Enter the Grant Cycle Salary.

### EXAMPLE:

*The grant cycle is the same as grant duration. If a grant is for 18 months and the base salary for an individual is \$50,000 and their annual raise is 4%, calculate their total salary over 18 months. Use the calculation below:*

$$\$50,000 + [(\$50,000 \times 1.04)/2] = \$76,000$$

*The 1.04 will return the value of the salary plus the raise and the 2 represents 6 months or half a year. If this grant were for 15 months or 1 and 1/4 years, the numerator would be divided by 4.*

- FTE %:** Enter the federal percentage for the line item being requested from OEA.
- OEA Funds:** The amount of funding being requested from OEA. This is a system calculated field, so DO NOT enter a value in this field.
  - Grant Cycle Salary x FTE (%) = OEA Funds
- Nonfed FTE (%):** Enter the percentage for the line items the organization is paying for and committing as match/cost share.
- Non-Federal Funds:** The amount of money that the organization will fund. This is a system calculated field, so DO NOT enter a value in this field.
  - Grant Cycle Salary x Nonfed FTE (%) = Non-Federal Funds
- Grant Cycle Fringe:** This should be the total amount for fringe benefits for the individual for the entire grant. Calculate using the same formula as the Grant Cycle Salary.



- h. **OEA Fringe:** The amount OEA is requested to pay, based on the percentage entered and the Grant Cycle Fringe. This is a system calculated field, so DO NOT enter a value in this field.
- i. Grant Cycle Fringe x FTE (%) = OEA Fringe
- i. **Non-Federal Fringe:** The amount of money that the organization will fund. This is a system calculated field, so DO NOT enter a value in this field.
- i. Grant Cycle Fringe x Nonfed FTE (%) = Non-Federal Fringe

4. Enter information for the remaining sections.

a. **Total Salaries + Fringe Benefits**

- i. This will automatically total the salaries and fringe benefits entered in the first section.

Total Salaries + Fringe Benefits			
	OEA Funds	Non-Federal Funds	Total
Total Salaries + Fringe Benefits	\$201,500.00	\$147,000.00	\$348,500.00

b. **Travel**

- i. Enter the amount of funding being requested from OEA and the amount the grantee will be paying.

Travel				
Description	Local/Out-of-Area	OEA Funds	Non-Federal Funds	Total
Travel description here.	Local	\$5,000.00	\$5,000.00	\$10,000.00
		\$5,000.00	\$5,000.00	\$10,000.00

c. **Equipment**

Equipment			
Description	OEA Funds	Non-Federal Funds	Total
Equipment description here.	\$10,000.00	\$10,000.00	\$20,000.00
	\$10,000.00	\$10,000.00	\$20,000.00

ADD



**d. Supplies**

Supplies			
Description	OEA Funds	Non-Federal Funds	Total
<input type="text" value="Supplies description here."/>	<input type="text" value="\$3,000.00"/>	<input type="text" value="\$6,000.00"/>	<input type="text" value="\$9,000.00"/>
	\$3,000.00	\$6,000.00	\$9,000.00

ADD

**e. Other**

Other			
Description	OEA Funds	Non-Federal Funds	Total
<input type="text" value="Other description here."/>	<input type="text" value="\$500.00"/>	<input type="text" value="\$300.00"/>	<input type="text" value="\$800.00"/>
	\$500.00	\$300.00	\$800.00

ADD

**f. SUBTOTAL OPERATIONS**

- i. This section will automatically populate with the amounts entered above.

SUBTOTAL OPERATIONS			
	OEA Funds	Non-Federal Funds	Total
SUBTOTAL OPERATIONS	\$220,000.00	\$168,300.00	\$388,300.00

**g. Contractual**

Contractual			
Description	OEA Funds	Non-Federal Funds	Total
<input type="text" value="Contractual description here."/>	<input type="text" value="\$8,000.00"/>	<input type="text" value="\$11,000.00"/>	<input type="text" value="\$19,000.00"/>
	\$8,000.00	\$11,000.00	\$19,000.00

ADD

**h. Total Direct Costs**

- i. This section will automatically populate with the amounts entered above.

Total Direct Costs			
	OEA Funds	Non-Federal Funds	Total
Total Direct Costs	\$228,000.00	\$179,300.00	\$407,300.00

**i. Indirect Costs**

Indirect Costs			
Description	OEA Funds	Non-Federal Funds	Total
<input type="text" value="Indirect costs description here."/>	<input type="text" value="\$1,000.00"/>	<input type="text" value="\$500.00"/>	<input type="text" value="\$1,500.00"/>
	\$1,000.00	\$500.00	\$1,500.00

ADD

**j. Grand Total**

- i.** This adds the last three sections with the totals from the SUBTOTAL OPERATIONS section.

Grand Total			
	OEA Funds	Non-Federal Funds	Total
Grand Total	\$229,000.00	\$179,800.00	\$408,800.00

- 5.** Click **Save** once the worksheet is completed.
- 6.** **Close** the **Budget Worksheet** and return to the budget page.
- 7.** The information that was entered on the pop-up **Budget Worksheet** can now be found on the main budget screen in the portal. Note that the system does not verify if the totals match.

Main
Notes

### Budget Worksheet

Open

#### Salary and Fringe

Position	Grant Cycle Salary	FTE (%)	OEA Funds	Nonfed FTE (%)	Non-Federal Funds	Grant Cycle Fringe	OEA Fringe	Non-Federal Fringe	Total Salary	Total Fringe	Total
Owner	\$150,000.00	50%	\$75,000.00	35%	\$52,500.00	\$100,000.00	\$50,000.00	\$35,000.00	\$127,500.00	\$85,000.00	\$212,500.00
Manager	\$100,000.00	45%	\$45,000.00	35%	\$35,000.00	\$70,000.00	\$31,500.00	\$24,500.00	\$80,000.00	\$56,000.00	\$136,000.00
	\$250,000.00	95%	\$120,000.00	70%	\$87,500.00	\$170,000.00	\$81,500.00	\$59,500.00	\$207,500.00	\$141,000.00	\$348,500.00

#### Total Personnel

	OEA Funds
Total Salaries + Fringe Benefits	\$201,500.00

#### Travel

Description	Local/Out-of-Area	OEA Fund
Travel description here.	Local	\$5,000.0
		\$5,000.0

#### Equipment

Description	OEA Funds
Equipment description here.	\$10,000.00
	\$10,000.00

- 8.** After returning to the **Budget** tab, notice that the status is “Draft.” There will also be a summary of what was entered on the Budget Worksheet.
  - a.** As long as the status of the application is “Draft,” the numbers can be edited.

*Budget Worksheet for Construction Grant*

1. Open the worksheet by following the instructions under **Complete the Budget** on B-13.
2. Construction costs must be itemized and entered individually.
  - a. Multiple lines can be entered for each category.
3. To add a line to the construction budget, click:
4. Enter information for each of the four fields.
  - a. **Description:** Not required to complete but is recommended.
  - b. **Category:** Choose from the provided drop-down menu.
  - c. **OEA Funds:** Enter correct number.
  - d. **Non-Federal Funds:** Enter correct number.
5. To remove a line from the construction budget, click:
6. The **Total Direct Costs** and **Grant Total** columns will calculate automatically based on what is entered in the **OEA Funds** and **Non-Federal Funds** columns.
7. A completed construction budget will look like the image below.

## Category

- Administrative and legal expenses ▼
- Administrative and legal expenses
- Land, structures, rights-of-way, appraisals, etc.
- Relocation expenses and payments
- Architectural and engineering fees
- Other architectural and engineering fees
- Project inspection fees
- Site work
- Demolition and removal
- Construction
- Equipment
- Miscellaneous
- Contingencies

Construction				
Description	Category	OEA Funds	Non-Federal Funds	Total
Relocation description here.	Administrative and legal expenses ▼	\$100.00	\$100.00	\$200.00
Site work description here.	Site work ▼	\$200.00	\$200.00	\$400.00
Construction description here.	Construction ▼	\$300.00	\$300.00	\$600.00
		\$600.00	\$600.00	\$1,200.00
<div>+</div>				
Total Direct Costs				
		OEA Funds	Non-Federal Funds	Total
Total Direct Costs		\$600.00	\$600.00	\$1,200.00
Grand Total				
		OEA Funds	Non-Federal Funds	Total
Grand Total		\$600.00	\$600.00	\$1,200.00



8. Click **Save** once the worksheet is completed.
9. Close the **Budget Worksheet** and return to the budget page.

**WARNING:**

**CLICK CLEAR ONLY IF ALL LINES NEED TO BE REMOVED. CLEAR DELETES ALL LINES EVEN IF THEY WERE PREVIOUSLY SAVED.**

10. The construction information will be entered into two locations under the **Budget** tab:
  - a. **Budget Worksheet:** Information viewed directly on the screen.

Main Budget Worksheet

Notes Open

**Construction**

Description	Category	OEA Funds
Relocation description here.	Administrative and legal expenses	\$100.00
Site work description here.	Site work	\$200.00
Construction description here.	Construction	\$300.00
		\$600.00

**Total Direct Costs**

	OEA Funds	Non-Federal Funds
Total Direct Costs	\$600.00	\$600.00

**Grand Total**

	OEA Funds	Non-Federal Funds
Grand Total	\$600.00	\$600.00

11. **SF 424C:** Click the **Open** button to view information in a pop-up window.

424C - Google Chrome

Secure | https://oeadev.smartsimple.com/s\_viewxml?page.jsp?fieldid=Y0BuCGFBV30xYEpic09Y8FBpXFJGeGNdAgEOAQIxAwv~&codedid=QAtQGk14MPkjBkxcEnA0BzAZJfVwU...

**424C**

OFFICE OF ECONOMIC ASSISTANCE  
OEA  
RELIABLE COMMITMENTS HELP THE PROCESS

	Total Cost	Costs Not Allowable for Participation	Total Allowable Costs
Administrative and legal expenses			
Land, structures, rights-of-way, appraisals, etc.			
Relocation expenses and payments			
Architectural and engineering fees			
Other architectural and engineering fees			

Save Clear Close



## Budget Justification

1. Underneath the newly imported financial information on the main **Budget** page is a section for Budget Justification.

### Budget Justification

Upload Budget Justification using the buttons below. Make sure to review what needs to be included in the justification document

- Identify the source and amount of non-Federal match
- Do not duplicate information contained in the Application Narrative or Scope of Work
- Validate that all costs are allowable, necessary, reasonable and allocable to the project under 2 CFR Part 200, Uniform Adminis
- Using the budget builder function in EADS2, provide a line item budget that identifies all costs by object class category. A brief

### Budget Justification - Upload



2. Follow the file uploader instructions on page K-2 to complete.

## Filling out the SF 424 A

1. On the main Budget page under SF 424A, click **Open** to bring up the SF 424A worksheet in a separate window.

### 424A

Open

#### Section A - Budget Summary

#### Section B - Budget Categories

#### Section C - Non-Federal Resources

#### Section D - Forecasted Cash Needs

#### Section E - Budget Estimates of Federal Funds Needed for Balance of The Project


#### Section F- Other Budget Information

2. The Budget Worksheet is adding the numbers for this proposed grant only. It does not know other possible sources of funding that might be utilized for this project, such as state or local sources.
  - a. These sources are what needs to be entered into the SF 424 by the user.
3. Follow the instructions on the form and the advice from the assigned OEA Project Manager to complete each section of the SF 424A. The window will look like this:



424A - Google Chrome

Secure | https://oeadev.smartsimple.com/s\_viewxmlpage.jsp?fieldid=UAF25F9CFV1rcWFxWwZ5AgR5H25GeAd1AgE0NgsIBA0~8&codedid=a3BXT999/VkDNmcFahUJExx...

 424A

**Section A - Budget Summary**

(a) Grant Program Function or Activity	(b) Catalog of Federal Domestic Assistance Number	(c) Estimated Unobligated Funds: Federal	(d) Estimated Unobligated Funds: Non Federal	(e) New or Revised Budget Federal	(f) New or Revised Budget: Non Federal	Total
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Total						

**Section B - Budget Categories**

Object Class Categories	(1) Federal Grant Program, Function or Activity	(2) Non Federal Grant Program, Function or Activity	(3)	(4)	(5) Total
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Save Clear Close

**NOTE:**

Clicking **Clear** only removes recently input information that wasn't saved. It does not remove previously entered and saved information. Click **Save** to ensure numbers are committed to the budget.

- Section A: Budget Summary**

**Section A - Budget Summary**

(a) Grant Program Function or Activity	(b) Catalog of Federal Domestic Assistance Number	(c) Estimated Unobligated Funds: Federal	(d) Estimated Unobligated Funds: Non Federal	(e) New or Revised Budget Federal	(f) New or Revised Budget: Non Federal	Total
Function	<input type="text"/>	\$1,000.00	\$2,000.00	\$3,000.00	\$4,000.00	\$10,000.00
Activity	<input type="text"/>	\$100.00	\$200.00	\$300.00	\$400.00	\$1,000.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Total		\$1,100.00	\$2,200.00	\$3,300.00	\$4,400.00	\$11,000.00



## Section B: Budget Categories

- This section is updated automatically with information from the **Budget Worksheet**.

Section B - Budget Categories					
Object Class Categories	(1) Federal Grant Program, Function or Activity	(2) Non Federal Grant Program, Function or Activity	(3)	(4)	(5) Total
a. Personnel	<input type="text" value="120000"/>	<input type="text" value="87500"/>			
b. Fringe Benefits	<input type="text" value="81500"/>	<input type="text" value="59500"/>			
c. Travel	<input type="text" value="5000"/>	<input type="text" value="5000"/>			
d. Equipment	<input type="text" value="10000"/>	<input type="text" value="10000"/>			
e. Supplies	<input type="text" value="3000"/>	<input type="text" value="6000"/>			
f. Contractual	<input type="text" value="8000"/>	<input type="text" value="11000"/>			
g. Construction	<input type="text"/>	<input type="text"/>			
h. Other	<input type="text" value="500"/>	<input type="text" value="300"/>			
i. Total Direct Charges (Sum of a - h)					
j. Indirect Charges	<input type="text" value="1000"/>	<input type="text" value="500"/>			
Totals (sum of i - j)					
Program Income	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

## Section C: Non-Federal Resources

Section C - Non-Federal Resources				
(a) Grant Program	(b) Applicant	(c) State	(d) Other Resources	(e) Totals
Non-Federal Resources	<input type="text" value="\$1,000.00"/>	<input type="text" value="\$2,000.00"/>	<input type="text" value="\$3,000.00"/>	<input type="text" value="\$6,000.00"/>
Non-Federal Resources 2	<input type="text" value="\$4,000.00"/>	<input type="text" value="\$5,000.00"/>	<input type="text" value="\$6,000.00"/>	<input type="text" value="\$15,000.00"/>
	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
Total	<input type="text" value="\$5,000.00"/>	<input type="text" value="\$7,000.00"/>	<input type="text" value="\$9,000.00"/>	<input type="text" value="\$21,000.00"/>

## Section D: Forecasted Cash Needs

Section D - Forecasted Cash Needs					
Forecast	Total for 1st Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Federal	<input type="text" value="\$4,000.00"/>	<input type="text" value="\$1,000.00"/>	<input type="text" value="\$1,000.00"/>	<input type="text" value="\$1,000.00"/>	<input type="text" value="\$1,000.00"/>
Non-Federal	<input type="text" value="\$4,000.00"/>	<input type="text" value="\$1,000.00"/>	<input type="text" value="\$1,000.00"/>	<input type="text" value="\$1,000.00"/>	<input type="text" value="\$1,000.00"/>
Total	<input type="text" value="\$8,000.00"/>	<input type="text" value="\$2,000.00"/>	<input type="text" value="\$2,000.00"/>	<input type="text" value="\$2,000.00"/>	<input type="text" value="\$2,000.00"/>





## ■ Section E: Budget Estimates of Federal Funds Needed for Balance of the Project

### Section E - Budget Estimates of Federal Funds Needed for Balance of The Project

(a) Grant Program	(b) First Funding Period	(c) Second	(d) Third	(e) Fourth
Grant Program	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
Grant Program 2	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00

## ■ Section F: Other Budget Information

### Section F - Other Budget Information

Direct Charges	Direct charges here.
Indirect Charges	Indirect charges here.
Remarks	Remarks here.

4. Click **Save** then **Close**.

5. The system will fill in the SF 424A information in the budget activity on the main Budget page.

424A

Open

### Section A - Budget Summary

(a) Grant Program Function or Activity	(b) Catalog of Federal Domestic Assistance Number	(c) Estimated Un-obligated Funds: Federal	(d) Estimated Un-obligated Funds: Non Federal	(e) New or Revised Budget Federal	(f) New or Revised Budget: Non Federal	Total
Function		\$1,000.00	\$2,000.00	\$3,000.00	\$4,000.00	\$10,000.00
Activity		\$100.00	\$200.00	\$300.00	\$400.00	\$1,000.00
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total		\$1,100.00	\$2,200.00	\$3,300.00	\$4,400.00	\$11,000.00

### Section B - Budget Categories

Object Class Categories	(1) Federal Grant Program, Function or Activity	(2) Non Federal Grant Program, Function or Activity	(3)	(4)	(5) Total
a. Personnel	\$120,000.00	\$87,500.00	\$0.00	\$0.00	\$207,500.00





## Assurance and Certifications

The final tab of grant application is **Assurance and Certifications**. The top of this section and each document name will have detailed descriptions explaining the document's purpose.



1. Download each form by clicking **here** in the instructions above the various upload buttons. Forms will open in a new window.

GRANT DETAILS   APPLICATION (SF 424)   APPLICATION NARRATIVE   BUDGET   **ASSURANCES AND CERTIFICATIONS**

---



**Lobbying Cert**

Required by 32 CFR Part 28, this document certifies that the Grantee's Authorizing Official understands and certifies the validity of the information provided. Please download the certification form [here](#). After completing, please upload it here.

Test\_File.pdf  



**SF LLL**

Required by OMB, the information requested through this form is authorized by title 31 U.S.C. §1352. This information will be reported to the Congress. Please download the SF LLL form [here](#). After completing, please upload it here.

Test\_File.pdf  

**\* Assurance Document**

This document is required by OMB and makes the grantee aware of numerous requirements pertaining to federal grant-making which are contained in the Assurance Document. Please download the assurances form [here](#). After completing, please upload it here.



Test\_File.pdf  

**\* I acknowledge that I have read the assurance document**

Yes

**\* Tax Delinquency**


This document certifying that the grantee has no outstanding tax liabilities and it has no past felony convictions (required by OMB). Please download the Tax Delinquency and Felony Convictions Form [here](#). After completing, please upload it here.

Test\_File.pdf  

**\* I acknowledge that I have read the Lobbying Activities document**

Yes

\*By signing this application, I certify (1) to the statements contained in the list of certifications\*\* and (2) that the statements herein are true and correct. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties.

☒ I Agree 

2. Complete, sign, and upload the Lobbying Cert, SF LLL, Assurance Document, and Tax Delinquency forms.
3. Click **Close** to return to the application once the form is uploaded. They will have been uploaded in their respective sections.
4. Click "I Agree" once each form has been uploaded and save the draft.
5. Click **Save**.



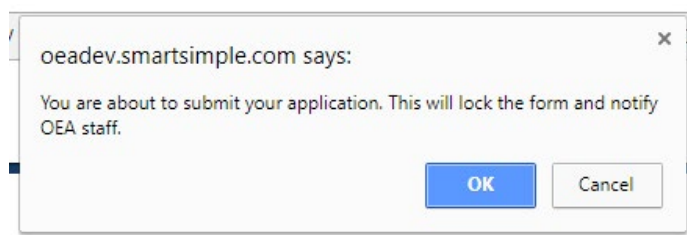
## Submitting an Application to OEA

Once an applicant has entered all of the required information and ensured that it is correct, it can be submitted. Be sure to verify that all required documents have been uploaded and the Budget Worksheet is correct. Once submitted, it will be sent to the assigned Project Manager at OEA.

1. Click **Submit** on the bottom of the grant application screen.



2. This pop-up will appear after clicking **Submit**, alerting the applicant that the application will be submitted to OEA and will be locked for editing.



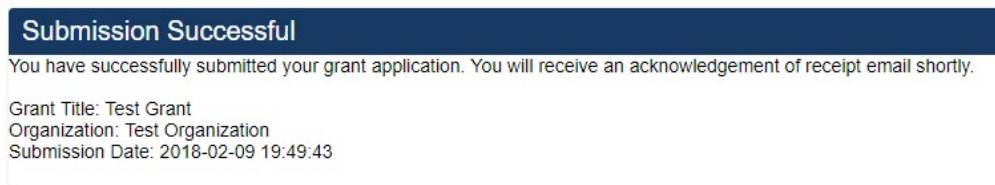
3. The system will provide pop-up alerts to the applicant if any sections are invalid or incomplete. These must be fixed before the application can be submitted to OEA.
  - a. The errors will also show up in a list on a red section on the application itself.

### Test Grant

Please correct the following errors and try again.

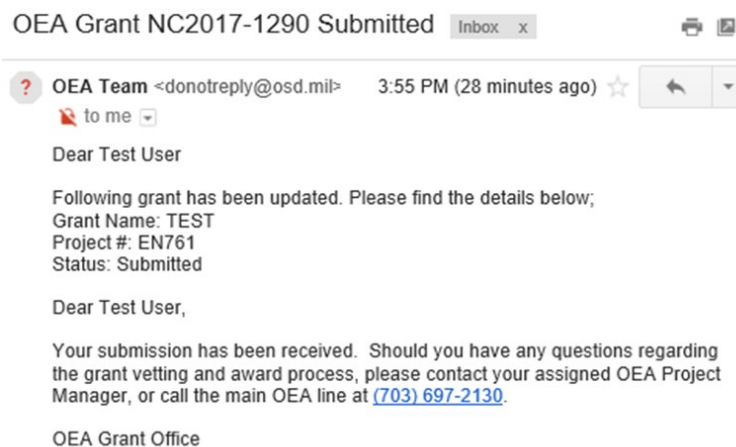
- Please make sure you have assigned an Authorizing Official to your application under Grant Contacts tab.
- You must enter State and County FIPS codes on your organization profile

4. Once any errors have been fixed and the application is sent, the applicant will receive a notification confirming submission.
  - a. The status will change from “Draft” to “Submitted.”





5. The applicant will receive the following email confirming submission of the application.

**NOTE:**

*Please coordinate the application's submission with the assigned OEA Project Manager.*



## OEA Review of Application

After the application has been submitted to the OEA, it must undergo review by the Project Manager (PM), Grants Management Specialist (GMS), and Program Director (PD). This is to ensure that the grant application has been reviewed thoroughly by both program and compliance personnel before it is reviewed by the Director at a TRC (Technical Review Committee).

During the TRC, OEA might determine that modifications need to be made to the grant application before it can be awarded. Some applications might not make it to the TRC step.

1. If modifications are needed, the application will be in the **Proposed Grants** tab with the status of “Revisions Required.”
2. Open the application and review the new **Staff Comments**. This will explain what needs to be corrected, removed, or revised.

**Main**

**Notes**

**Contacts**

**More...**

### Test Grant

**# of Days Complete** 5

**Application Received:**

**Grant Type:** Non-Construction

**\* Grant Title:** Test Grant

**\* Primary Delegated Authority:** Emilee Grantee ?

**Status:** Revisions Required

**Is this a Supplemental Application?:**

**Project Name:** Test Project

**Project Number:** SCON885

**Grant Preview:** [Open](#)

**Submission Number:** NC2018-1355

**Staff Comments**

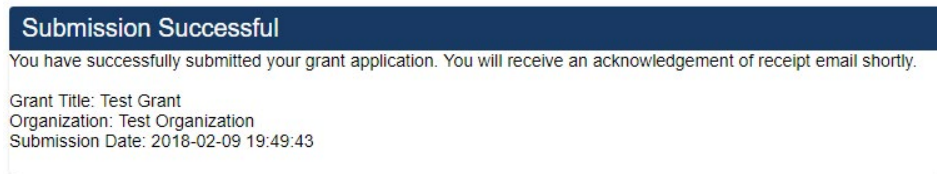
Staff comments (revisions required) here.



3. Applicant should make requested changes and choose one of the two options below:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Submit Revision** once updates are completed.



4. Once submitted, the notification below will appear.

**NOTE:**

*Please work closely with the assigned OEA Project Manager on any necessary revisions.*



## Submitting for Final Signature

### Primary Delegated Authority Signature

Once OEA has finished reviewing the application (either the original or the revised version), the grant application will be routed back to the Primary Delegated Authority for signature.

1. Open the grant application under **Proposed Grants**.

Grants Management						
<a href="#">PROPOSED GRANTS (8)</a> <a href="#">AWARDED GRANTS</a> <a href="#">GRANT AGREEMENTS &amp; CLOSEOUT (14)</a> <a href="#">GRANT REPORTS (50)</a> <a href="#">GRANT AMENDMENTS</a>						
<input type="text"/> <input type="button" value="X"/> <input type="button" value="Q"/>						
#	Project Title	Organization	Primary Contact	Funding Program	Status	
1	<a href="#">Open</a>	Test Grant	Test Organization	Emilee Grantee	Non-Construction	Final Signature Required - PDA

2. Click on the new **Final Signature** tab.

APPLICATION (SF 424)	APPLICATION NARRATIVE	BUDGET	ASSURANCES AND CERTIFICATIONS	<b>FINAL SIGNATURE</b>
----------------------	-----------------------	--------	-------------------------------	------------------------

\* Primary Delegated Authority Name:

\* Date Primary Delegated Authority signed the application:

3. Enter name and date.
4. The PDA will have two options at this point:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Sign and Submit to AO** to provide final signature and complete the application.

<a href="#">Save Draft</a>	<a href="#">Sign and Submit to AO</a>
----------------------------	---------------------------------------

5. Click **Sign and Submit to AO**. The confirmation below will appear when the signature has been successfully submitted.

Submission Successful
You have successfully submitted your grant application. You will receive an acknowledgement of receipt email shortly.
Grant Title: Test Grant Organization: Test Organization Submission Date: 2018-02-09 19:49:43



## Authorizing Official Signature

Once the PDA signs and submits the application, it will be routed to the Authorizing Official.

1. **Open** the grant application under **Proposed Grants**.
  - a. The status will be “Final Signature Required - AO.”

Grants Management						
<div>PROPOSED GRANTS (11)    AWARDED GRANTS    GRANT AGREEMENTS &amp; CLOSEOUT (12)    GRANT REPO</div>						
<div></div>						
#	Project Title	Organization	Primary Contact	Funding Program	Status	
1	<div>Open</div> Test Grant	Test Organization	Emilee Grantee	Non-Construction	Final Signature Required - AO	

2. Click on the new **Final Signature** tab.

APPLICATION (SF 424)    APPLICATION NARRATIVE    BUDGET    ASSURANCES AND CERTIFICATIONS    **FINAL SIGNATURE**

\* Primary Delegated Authority Name:

Emilee Grantee

\* Date Primary Delegated Authority signed the application:

02/13/2018

\* Authorizing Official Name:

\* Date Authorizing Official signed the application:

mm/dd/yyyy

3. Enter name and date.
4. The AO is also required to complete two acknowledgments. These are found under the **Assurances and Certifications** tab.

\* I acknowledge that I have read the assurance document

☒ Yes

\* Tax Delinquency

This document certifying that the grantee has no outstanding tax liabilities  
Please download the Tax Delinquency and Felony Convictions Form [here](#).

Test\_File.pdf

\* I acknowledge that I have read the Lobbying Activities document

☒ Yes

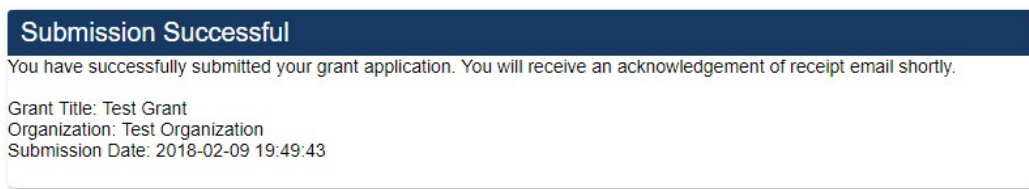




5. The AO will have the following options:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Submit Final Signature** to provide final signature and complete the application.



6. Click **Submit Final Signature**. The confirmation below will appear when the signature has been successfully submitted.



## OEA Review

OEA will be notified once the final signatures have been submitted. The application's status will change to "Complete Application Received." OEA will then review the application and, if approved, prepare the Grant Agreement.





# Awarded Grants Tab

## Awarded Grants Layout

After an application has been reviewed and approved by OEA staff, the Grant Agreement will be signed and returned. The application will then become “Awarded” and will be found in **Awarded Grants** tab, which contains all of the grants that have been approved for the grantee.

The **Awarded Grants** tab contains:

- All awarded grant applications, including supplemental grants.
  - Click the **Open** button on the left for read-only access to the grant application containing all of the application details, contact information, and the grant application PDF.
- An **Open** button for each grant application PDF.
  - Click the **Open** button on the right for a pop-up window containing the grant application. A PDF can be exported from this window.
- An **Add Amendment** button for each grant.
  - Click to create an amendment for an awarded grant. This will then show up as a draft under the **Grant Amendments** tab.

Grants Management

< PROPOSED GRANTS (9)

AWARDED GRANTS

GRANT AGREEMENTS & CLOSEOUT (17)

GRANT REPORTS (78)

GRANT AMENDMENTS

#	Organization Name	Grant Title	Title of Applicant Project	Grant Number	FAIN	Project Manager	Status	Amount Approved	Grant Application PDF	Actions
1	<div>Open</div> Test Organization	Test Grant	Test Grant	SCON826-18-01	HQ00051810000	Emilee Projectmanager	Grant Awarded	\$10,000.00	<div>Open</div>	

### NOTE:

*A grant is officially awarded when the Director approves a Grant Agreement, not an application. It is possible for a community to turn down an award after it has been approved by the Director. If the community's Authorizing Official does not return a signed Grant Agreement, no money will be obligated.*



When an awarded grant is opened, the community user will be able to see the following information. All of these details were entered during the grant application process or when revisions were requested. See Proposed Grants (B) for reminders on the application process.

- **Main:** This section above the four smaller tabs contains the basic grant details. There is an **Open** button for viewing the grant application in a PDF format.
- **Application (SF 242):** This section contains applicant information and estimated funding.
- **Application Narrative:** This tab lists key personnel, contractors, sub recipients, and deliverables. It also contains information such as the grant background, abstract, and Scope of Work. Additional supporting documents submitted during the application can be found here.
- **Budget:** The Budget Worksheet and Budget Justification are found under this tab.
- **Assurances and Certifications:** The Lobbying Cert, SF LLL, Assurance Document, and Tax Delinquency documents are located here.
- **Contacts:** All of the community contacts and OEA staff assigned to the grant are listed under this tab.

**Test Grant**

Grant Type: Non-Construction

\* Organization Name: Test Organization

\* Project Manager: Emilee Projectmanager

AO Name: [Emilee Authorizingofficial](#)

Associated Grants: --Select One--

Project Type: Establishment or Expansion

Finances: [Financial Summary](#)

Grant Preview: [Open](#)

Grant Number: SCON826-18-01 ?

FAIN: HQ00051810000 ?

\* Grant Title: Test Grant

\* Primary Delegated Authority: Emilee Grantee ?

Status: Grant Awarded

Is this a Supplemental Application?:

Project Name: Test Project

Project Number: EX826

APPLICATION (SF 424) APPLICATION NARRATIVE BUDGET ASSURANCES AND CERTIFICATIONS



## Financial Summary (Burn Rate)

The new Financial Summary button on the grant application contains a quick summary of the grant's financial data, such as grant duration, amount paid, and invoice data. Most importantly, the Financial Summary calculates the burn rate for the grant's financials to date.

### NOTE:

*The Financial Summary will only show when the grant has the status of "Grant Awarded" after the Grant Agreement process is completed.*

1. Open the desired grant.
2. Click on the **Financial Summary** button under the **Main** tab.
3. A pop-up box labeled **Finances** will appear.

The screenshot shows a pop-up window titled "Finances" with a close button (X) in the top right corner. Inside the window, there is a section titled "Financial Summary" with a blue header. Below this, there is a table with three columns: "Federal Amount Approved", "Amount Paid", and "Balance Remaining". The values are: \$229,000.00, \$0.00, and \$0.00 respectively. Below this, there is a table with two columns: "Grant Start Date" and "Grant End Date". The values are: 2018-02-09 and 2019-02-08 respectively. Below this, there is a table with three columns: "Grant Duration", "Remaining Grant Months", and "Burn Rate". The values are: 12, 11, and 19083 % respectively. Below the table, there is a note: "A negative number indicates an under burn, while a positive number indicates an over burn. The greater the number indicates the further away the balance from the expected value at that point in time." At the bottom of the window, there is a table with three columns: "Invoice #", "Payment Date", and "Amount (\$)".

Federal Amount Approved	Amount Paid	Balance Remaining
\$229,000.00	\$0.00	\$0.00

Grant Start Date	Grant End Date
2018-02-09	2019-02-08

Grant Duration	Remaining Grant Months	Burn Rate
12	11	19083 %

A negative number indicates an under burn, while a positive number indicates an over burn. The greater the number indicates the further away the balance from the expected value at that point in time.

Invoice #	Payment Date	Amount (\$)
-----------	--------------	-------------

### NOTE:

*A negative number under the **Burn Rate** section indicates an under burn. A positive number indicates an over burn. A higher number means the balance is further away from the expected value.*



4. Note the following:
  - a. If the **Grant Finances** tab is current with all of the grant's approved budgets, the **Federal Amount Approved** will contain supplemental awards.
  - b. If the grant has been closed, the **Burn Rate** section will say "Grant is closed. No burnout rate calculated."
5. The summary will also contain an **Invoice** section:
  - a. Invoice #
    - i. Unique payment identifier from the memo sent to DFAS.
  - b. Payment Date
    - i. Date that DFAS made the payment.
  - c. Amount (\$)
    - i. Amount paid to the grantee.



# Grant Agreements & Closeout Tab

## Grant Agreements & Closeouts Layout

The **Grant Agreements & Closeouts** tab contains the Grant Agreement and closeout activities for all awarded grants that are assigned to the community user. The Activity Type for each grant can be seen on the left, to the right of the **Open** button.

When the Grant Agreement is completed, a PDF of the Grant Agreement will be available under the **Activity Document** column to the right. Once the closeout letter is received, click **Preview** under **Activity Document** to view the letter.

Grants Management

< PROPOSED GRANTS (9)

AWARDED GRANTS

GRANT AGREEMENTS & CLOSEOUT (2)

GRANT REPORTS (78)

GRANT AMENDMENTS

>

#	Activity Type	Grant Name	Document Status	Date Approved	Activity Document	
<a href="#">Open</a>	1	Closeout	Test Grant	Complete	02/27/2018	<a href="#">Preview</a>
<a href="#">Open</a>	2	Grant Agreement	Test Grant	Complete	03/05/2018	<a href="#">Test_File.pdf</a>

## Completing a Grant Agreement

The Grant Agreement is a critical activity in the grant award process at OEA. It is the binding document between OEA and a community organization. Until there is a signed Grant Agreement from both parties, the community organization is considered an applicant and not a grantee.

### NOTE:

*The Federal Government is only obligated after the Director approves a Grant Agreement; however, the Authorizing Official must send the countersigned Grant Agreement to OEA before an obligation will be made.*

## OEA Creates and Reviews Grant Agreement

OEA will create the Grant Agreement and complete several reviews of the Grant Agreement and Award Letter. Grant reports will also be generated at this step.



## Authorizing Official Review

The letter and Grant Agreement will be routed to the Authorizing Official and will show up in their portal under the **Grant Agreements & Closeout** tab.

Grants Management						
<div> <a href="#">PROPOSED GRANTS (11)</a> <a href="#">AWARDED GRANTS</a> <a href="#">GRANT AGREEMENTS &amp; CLOSEOUT (13)</a> <a href="#">GRANT REPORTS (77)</a> <a href="#">GRANT AMENDMENTS</a> </div>						
<input type="text"/> <input type="button" value="x"/> <input type="button" value="Q"/>						
#	Activity Type	Grant Name	Document Status	Date Approved	Activity Document	
<a href="#">Open</a>	1	Grant Agreement	Test Grant	Awaiting Signature	02/16/2018	

1. Click **Open** next to the correct Grant Agreement then navigate to the **Grant Agreement** tab.

[GENERAL](#)
[GRANT AGREEMENT](#)
[LETTERS](#)

Grant Agreement:

1. Grant\_Agreement\_-\_Test\_Grant.pdf  
37 KB - 02/16/2018 11:45

**\* Countersigned Grant Agreement Upload**

Upload the Signed Grant Agreement here

2. Download a copy of the Grant Agreement, review, and then sign and upload the counter-signed copy under **Countersigned Grant Agreement Upload**.
  - a. At the time of printing this manual, electronic signatures are **not** accepted.
  - b. See the Appendices (K) for steps on uploading a document.



3. Navigate to the **Letters** tab.

GENERAL   GRANT AGREEMENT   **LETTERS**

---

Official Activity Letter:  

 **1. Grant\_Agreement\_-\_SCON826-18-01\_.pdf**  
168 KB - 02/16/2018 11:45

Additional Attachments: 

\* Awardee Name:

\* Award Date:  

\* I acknowledge that I understand the terms and conditions outlined on the attached grant agreement

☐ I agree

4. Download and review the official award letter.

5. Enter name, date, and click “I agree” to the statement acknowledging terms and conditions.

6. The AO will then have the following options:

- a. **Save Draft** to save any changes made and continue working later.
- b. **Submit Counter Signed GA** to complete the review and submit.
- c. **Return to Application** to view all of the application’s details.

**Save Draft**   **Submit Countersigned GA**   **Return to Application**

7. Choose **Submit Counter Signed GA** to complete the process.

- a. The status will change to “Complete.”

8. Once submitted, the notification below will appear.

**Submission Successful**  
You have successfully submitted the Grant Agreement for the following:  
Grant Title: Test Grant  
Organization: Test Organization  
If further assistance is needed, please contact your PM. Thank you.



9. Additionally, the countersigned PDF will now appear on the home page.

10. Navigate to the **Grant Agreements & Closeout** tab then to the **Activity Document** column to view the document.

Grants Management						
<div>PROPOSED GRANTS (11)   AWARDED GRANTS   <b>GRANT AGREEMENTS &amp; CLOSEOUT (9)</b>   GRANT REPORTS (80)   GRANT AMENDMENTS</div>						
<div><input type="text"/> <input type="button" value="x"/> <input type="button" value="Q"/></div>						
#	Activity Type	Grant Name	Document Status	Date Approved	Activity Document	
<div>Open</div>	1	Grant Agreement	Test Grant	Complete	03/05/2018	<a href="#">Test_File.pdf</a>





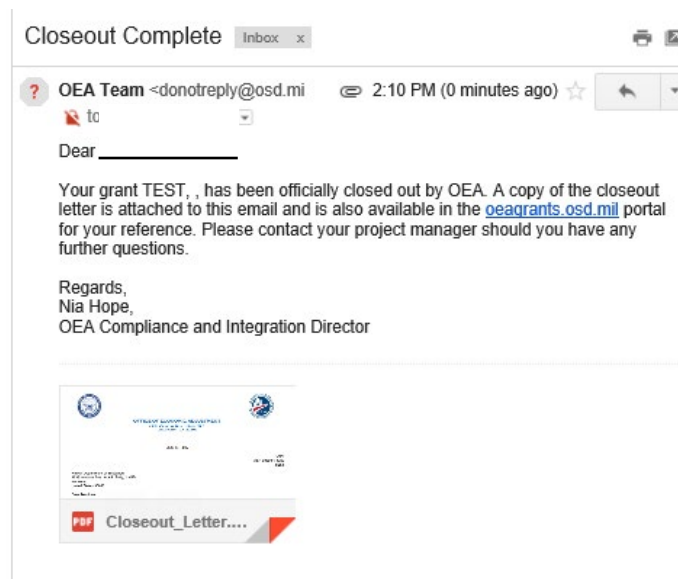
## Completing a Closeout

The instructions for closeout are included here because they are found in the same tab as Grant Agreements in the OEA Grants Portal; however, a closeout activity is not completed until the very end of the grant process.

The OEA Grants Portal does not allow closeout if there are pending reports, amendments, or deliverables. Once everything is completed, OEA will begin the closeout process.

### Notification of Closeout Letter

1. After the OEA Director approves the closeout letter, both the AO and PDA will be sent a notification via email. A copy of the closeout letter will be attached to the email.



### Closeout Activity

1. Navigate to the desired closeout activity and click the **Open** button in the far left column.
2. The top section contains all of the grant details, such as assigned OEA staff and financial information.



3. The **Letters** tab on the bottom contains the closeout letter. Click **Preview** next to **Closeout Letter** to view a PDF or the link underneath **File Name** to download the letter.
  - a. There will also be a section to access any additional documents that OEA uploaded.

Closeout - Test Grant

GENERAL LETTERS

Closeout - Test Grant

Organization: Test Organization	Program Type: Community Investment	Project Type: Establishment or Expansion
GMS: Emilee Grantsmanagementspecialist	PM: Emilee Projectmanager	Project Number : EX826
Grant Number: SCON826-18-01	FAIN: HQ00051810000	Report Code: Quarterly
Authorizing Official: Emilee Authorizingofficial	Grant Start - End Date: 02/09/2018 - 02/08/2019	Delegated Authority: Emilee Grantee
Approved Amount: \$10,000.00	Total Paid: \$0.00	Balance Remaining: \$0.00
Obligated Federal Amount: \$5,000.00	Deobligated Federal Amount: \$5,000.00	

Save Draft Return to Application

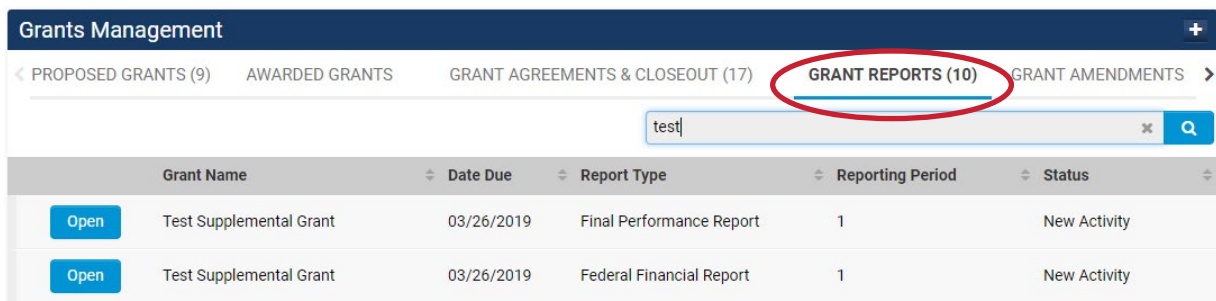
4. The following menu will be at the bottom of the screen for the community users:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Return to Application** to view all of the application's details.



# Grant Reports Tab

## Grant Reports Layout

The **Grant Reports** tab contains the reports for all awarded grants. The view below shows the Reporting Period, Status, and Date Due of each individual report. Once a Grant Agreement is signed, the report's status will automatically switch to "Scheduled."



Grants Management					
<div>PROPOSED GRANTS (9)   AWARDED GRANTS   GRANT AGREEMENTS &amp; CLOSEOUT (17)   <b>GRANT REPORTS (10)</b>   GRANT AMENDMENTS</div>					
<div>test</div>					
	Grant Name	Date Due	Report Type	Reporting Period	Status
<a href="#">Open</a>	Test Supplemental Grant	03/26/2019	Final Performance Report	1	New Activity
<a href="#">Open</a>	Test Supplemental Grant	03/26/2019	Federal Financial Report	1	New Activity

Throughout the life cycle of a grant there are three types of reports required:

- Performance Report
- Final Performance Report
- Federal Financial Report

## Completing a Performance Report

Performance Reports should be completed by the date listed in the **Due Date** column under the **Grant Reports** tab of the grantee's home page.

1. The PDA or Community Contact should complete the report.

### Grantee Completes Report

1. Navigate to the **Grant Reports** tab and open the Performance Report.
2. The Performance Report will have five tabs: **General**, **Activity Details**, **Objectives and Accomplishments**, **Project Expenses**, and **Additional Information**.



## General

The **General** tab contains all of the basic grant information. This section cannot be edited.

GENERAL	ACTIVITY DETAILS	OBJECTIVES AND ACCOMPLISHMENTS	PROJECT EXPENSES	ADDITIONAL INFORMATION
Performance Report - Test Grant				
Organization: Test Organization	Program Type: Community Investment	Project Type: Establishment or Expansion		
GMS: Emilee Grantsmanagementspecialist	PM: Emilee Projectmanager	Project Number : EX826		
Grant Number: SCON826-18-01	FAIN: HQ00051810000	Report Code: Quarterly		
Authorizing Official: Emilee Authorizingofficial	Grant Start - End Date: 02/09/2018 - 02/08/2019	Delegated Authority: Emilee Grantee		
Approved Amount: \$10,000.00	Total Paid: \$0.00	Balance Remaining: \$5,000.00		
Obligated Federal Amount: \$5,000.00	Deobligated Federal Amount: \$0.00			

## Activity Details

1. Select the **Activity Details** tab and verify the information is correct.
2. Correct the Reporting Period dates if necessary.
3. Click **Open** next to **Grant Preview** to open the entire grant in a new screen.
  - a. Click **Export as PDF** to download a PDF of the grant.
4. Click **Open** next to **Activity Preview** to open the report activity in a new screen.
  - a. Click **Export as PDF** to download a PDF of the activity.

GENERAL	ACTIVITY DETAILS	OBJECTIVES AND ACCOMPLISHMENTS	PROJECT EXPENSES	ADDITIONAL INFORMATION
<div>Grant Preview: <a href="#">Open</a></div> <div>Activity Preview: <a href="#">Open</a></div> <div> <div>* Reporting Period: 1</div> <div>* Reporting Period Covered From: 02/09/2018 </div> <div>Report Type: Quarterly</div> </div> <div> <div>* Date Due: 06/01/2018</div> <div>* Reporting Period Covered To: 05/09/2018 </div> </div>				



## Objectives and Accomplishments

1. Select the **Objectives and Accomplishments** tab and answer both questions.

GENERAL   ACTIVITY DETAILS   **OBJECTIVES AND ACCOMPLISHMENTS**   PROJECT EXPENSES   ADDITIONAL INFORMATION

\* Compare actual accomplishments to the objectives established for the period.

\* Provide reasons for slippage if established objectives were not met.

## Project Expenses

1. Select the **Project Expenses** tab.

GENERAL   ACTIVITY DETAILS   OBJECTIVES AND ACCOMPLISHMENTS   **PROJECT EXPENSES**   ADDITIONAL INFORMATION

\* **Project Expenses**

Provide an accounting of actual and projected quarterly expenditures by the budget line items approved in the grant. The amount of Federal cash on hand at the beginning and end of the reporting period must also be provided.

Budget Worksheet

[Project Expenses](#)

2. Enter an overview of expenses into the provided **Project Expenses** text box.
3. Click the blue **Project Expenses** button to open the entire Budget Worksheet. This will open in a separate window.
  - a. Budget information previously approved will appear on the activity.


Budget Worksheet

[Project Expenses](#)

Category	Approved - Federal	Approved - Nonfederal	Spent - Federal	Spent - Non-Federal	Cumulative Federal	Cumulative Non-Federal
Personnel	\$120,000.00	\$87,500.00			\$0.00	\$0.00
Fringe Benefits	\$81,500.00	\$59,500.00			\$0.00	\$0.00
Travel	\$5,000.00	\$5,000.00			\$0.00	\$0.00
Equipment	\$10,000.00	\$10,000.00			\$0.00	\$0.00
Supplies	\$3,000.00	\$6,000.00			\$0.00	\$0.00
Other Costs	\$500.00	\$300.00			\$0.00	\$0.00
Contractual	\$8,000.00	\$11,000.00			\$0.00	\$0.00
Indirect Costs	\$1,000.00	\$500.00			\$0.00	\$0.00
Grand Total					\$0.00	\$0.00



4. Enter information into the available columns.



### Grant Budget

Grant Title: Test Grant

Applicant Organization: Test Organization

Request Number: NC2018-1339

Notes: Emilee Grantee, include revenues and expenses for *only* this project proposal. If a line item below does not apply to your proposal, leave it blank.

### Budget Worksheet

	Description	OEA Funds	Non Federal Funds	Total	Justification
Personnel	Personnel description here.	\$5,000.00	\$5,000.00	\$10,000.00	Personnel justification here.
Fringe	Fringe description here.	\$5,000.00	\$5,000.00	\$10,000.00	Fringe justification here.
Construction					
Contractual	Contractual description here.	\$5,000.00	\$5,000.00	\$10,000.00	Contractual justification here.
Equipment	Equipment description here.	\$5,000.00	\$5,000.00	\$10,000.00	Equipment justification here.

5. The system will automatically calculate totals:

- a. **Total** = Direct Costs Total + Indirect Costs Total
- b. **Grand Total** = OEA Funds Grand Total + Non Federal Funds Grand Total

6. Click **Save** then **Close** when the worksheet is complete.

7. Return to the main browser screen. The new numbers entered will show up under the Budget Worksheet section of the **Project Expenses** tab.

Category	Approved - Federal	Approved - Nonfederal	Spent - Federal	Spent - Non-Federal	Cumulative Federal	Cumulative Non-Federal
Personnel	\$120,000.00	\$87,500.00	\$5,000.00	\$5,000.00	\$10,000.00	\$10,000.00
Fringe Benefits	\$81,500.00	\$59,500.00	\$5,000.00	\$5,000.00	\$10,000.00	\$10,000.00
Travel	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Equipment	\$10,000.00	\$10,000.00	\$5,000.00	\$5,000.00	\$10,000.00	\$10,000.00
Supplies	\$3,000.00	\$6,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Other Costs	\$500.00	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00
Contractual	\$8,000.00	\$11,000.00	\$5,000.00	\$5,000.00	\$10,000.00	\$10,000.00
Indirect Costs	\$1,000.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Total			\$20,000.00	\$20,000.00	\$40,000.00	\$40,000.00

8. Click **Save Draft** to make sure changes have been committed to the system.






## Additional Information

1. Select the **Additional Information** tab and add information in the text box or upload additional files as needed.

GENERAL   ACTIVITY DETAILS   OBJECTIVES AND ACCOMPLISHMENTS   PROJECT EXPENSES   **ADDITIONAL INFORMATION**

Provide additional pertinent information as appropriate.

Additional File Attachments

## Submit Performance Report

1. The grantee will have the following options:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Submit to OEA** to submit and complete the required report.
    - i. Performance Reports do not get routed to the AO for approval. They are submitted directly to OEA.
  - c. **Return to Application** to view all of the application's details.

[Save Draft](#) [Submit to OEA](#) [Return to Application](#)

2. Click **Submit to OEA**.
  - a. The status will change to “Submitted to PM.”
3. The notification below will appear to confirm the submission.

**Submission Successful**

You have successfully submitted the Performance Report for the following:

Grant Title: Test Grant  
Organization: Test Organization

If further assistance is needed, please contact your PM. Thank you.





## OEA Review

The assigned OEA Project Manager will review the submitted report. If any corrections are needed, the PM may return the report to the grantee.

### Revisions Required

1. The status of the report will change to “Revision Required.”

Report Type	Reporting Period	Status
Performance Report	1	Revision Required

2. Complete the requested revisions based on the feedback found in the **Staff Comments** section under the **Activity Details** tab.

GENERAL
ACTIVITY DETAILS
OBJECTIVES AND ACCOMPLISHMENTS

Staff Comments

Revision comments here.

3. The following options are available once the revisions are complete:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Submit Revisions to OEA** for the PM to review the corrections.
  - c. **Return to Application** to view all of the application’s details.

Save Draft
Submit to OEA
Return to Application

4. Choose **Submit to OEA**.
5. Once OEA completes their review of the submitted revisions, the status will change to “Approved” and the Performance Report is complete.



## Completing a Final Performance Report

When the project is in the closeout process, a Final Performance Report needs to be completed. This report is due 90 days from the end of the grant.

1. The PDA or Community Contact should complete the report.

### Grantee Completes Report

1. Navigate to the **Grant Reports** tab and open the Final Performance Report.
2. Complete the Final Performance Report by following the Performance Report directions.
  - a. Instructions are on pages E-1 through E-6.
3. The fields for Performance and Final Performance Reports are the same, except for these highlighted differences:
  - a. **Objectives and Accomplishments:** For the Final Performance Report, enter information on the accomplishments of the entire grant period. (The normal Performance Report only includes part of the grant period.)
  - b. **Additional Information:** For the Final Performance Report, this tab has an additional Summary of Activities section.

#### Summary of Activities

\* Provide a summary of activities for the entire grant period. All required deliverables should be submitted with

#### SF 428 Tangible Personal Property Forms

Please download all the forms that apply to your grant from the [whitehouse.gov website](https://www.whitehouse.gov), and upload the completed for complete then upload.



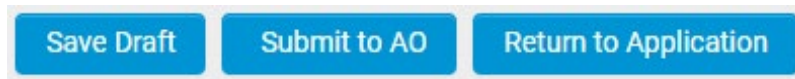
#### SF 429 Real Property Status Report

Please download the SF 429, if applicable to your grant, from the [whitehouse.gov website](https://www.whitehouse.gov), and upload the completed f complete then upload.

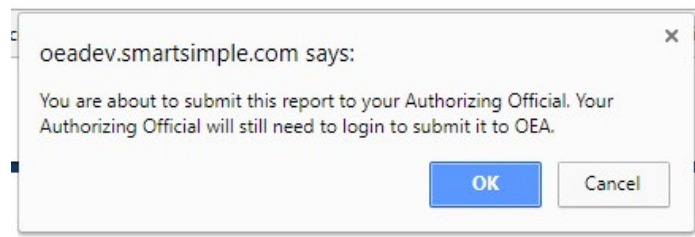




- c. SF 428 or SF 429:** Complete and upload if required.
      - i.** At the time of writing this manual, the White House website has not been updated with links to these forms.
- 4.** Unlike the Performance Report, the Final Performance Report needs to be routed to the Authorizing Official before being submitted to the OEA.
  - a.** This ensures that the AO is aware of all the activities being reported.
- 5.** The grantee will have three options:
  - a. Save Draft** to save any changes made and continue working later.
  - b. Submit to AO** once the report is complete and can be routed on to the AO.
  - c. Return to Application** to view all of the application's details.



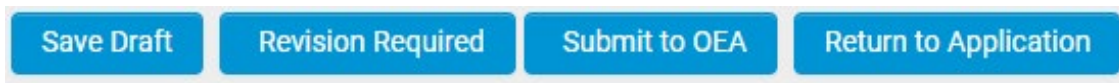
- 6.** Click **Submit to AO**.
  - a.** The status will change to “Submitted to AO.”
- 7.** The following notification will appear. Click **OK**.





## Authorizing Official Review

1. Review the report information from the PDA.
2. The AO will have the following options:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Revision Required** for any additional information, questions, or revisions.
    - i. This returns the report to the PDA with a status of “Revisions Required.”
  - c. **Submit to OEA** once the AO’s review is complete and the report can be routed on to the PM.
  - d. **Return to Application** to view all of the application’s details.



3. No signature is required by the AO on the Final Performance Report.
4. Click **Submit to OEA** to route the report to the Project Manager.
  - a. The status of the report will change to “Submitted to PM.”

## OEA Review

The assigned OEA Project Manager will review the submitted report. If any corrections are needed, the PM may return the report to the grantee.

## Revisions Required

1. The status of the report will change to “Revision Required.”

Report Type	Reporting Period	Status
Final Performance Report	1	Revision Required



2. Complete the requested revisions based on the feedback found in the **Staff Comments** section under the **Activity Details** tab.

GENERAL   **ACTIVITY DETAILS**   OBJECTIVES AND ACCOMPLISHMENTS

---

**Staff Comments**

Revision comments for Final Performance Report here.

3. The following options are available for the PDA once the revisions are complete:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Submit Revisions to AO** for the AO to review before resubmitting to OEA.
  - c. **Return to Application** to view all of the application's details.

Save Draft

Submit Revisions to AO

Return to Application

4. Click **Submit Revisions to AO**.
  - a. The status will change to "Submitted to AO."
5. The AO should review the corrected changes to verify that the PDA included all of the information OEA requested.
6. The AO will then have the following options:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Revisions Required** if the AO decides the PDA needs to include further information.
    - i. This will change the status to "Revisions Required."
  - c. **Submit to OEA** for the PM to review the corrections.
  - d. **View Application** to view all of the application's details.

Save Draft

Revision Required

Submit to OEA

Return to Application

7. Choose **Submit to OEA**.
8. Once OEA completes their review of the submitted revisions, the status will change to "Approved" and the Final Performance Report is complete.



## Federal Financial Report

There are two types of Federal Financial Reports: Interim and Final. Functionality is the same for both reports. Federal Financial Reports should be completed by the date listed in the **Due Date** column under the **Grant Reports** tab of the grantee's main page.

1. The PDA or Community Contact should complete the report.

### Grantee Completes Report

1. Navigate to the **Grant Reports** tab and open the Federal Financial Report.
2. A Federal Financial Report will contain two tabs: **General** and **Activity Details**.

#### General

The **General** tab contains all of the basic grant information. This section cannot be edited.

GENERAL	ACTIVITY DETAILS
---------	------------------

---

Federal Financial Report - Test Grant

Organization: Test Organization	Program Type: Community Investment	Project Type: Establishment or Expansion
GMS: Emilee Grantsmanagementspecialist	PM: Emilee Projectmanager	Project Number : EX826
Grant Number: SCON826-18-01	FAIN: HQ00051810000	Report Code: Quarterly
Authorizing Official: Emilee Authorizingofficial	Grant Start - End Date: 02/09/2018 - 02/08/2019	Delegated Authority: Emilee Grantee

#### Activity Details

1. Select the **Activity Details** tab and verify the information is correct. Correct the Reporting Period dates if necessary.

GENERAL	ACTIVITY DETAILS
---------	------------------

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Grant Preview: [Open](#)

Activity Preview: [Open](#)

\* Reporting Period: 1

\* Date Due: 02/28/2019

\* Reporting Period Covered From: 02/09/2018

\* Reporting Period Covered To: 02/09/2019

Financial Report Type: ☐ Quarterly ☐ Semi-Annual ☐ Annual ☐ Final

Basis of Accounting: ☐ Cash ☐ Accrual

DUNS

147258369

EIN

963852741



2. Click the **Edit Project Financials tab** under the **SF 425** section.

The screenshot shows the 'GENERAL' and 'ACTIVITY DETAILS' tabs. Under 'ACTIVITY DETAILS', there is a section for '\* SF425' with a blue button labeled 'Edit Project Financials'. Below this, there is a section for 'SF425 SmartField:' with a blue button labeled 'SF425 Preview'. At the bottom, there is a section for 'Supporting Documents' with three icons: an upload icon, a download icon, and a delete icon.

3. A pop-up box will appear. Enter the required financial information.
  - a. Note the **Indirect Expense** section has a comment box for any necessary information.
  - b. The bottom of the pop-up box contains specific instructions for each line.

#### Instructions

- Line #10a. Cash Receipts - Amount of Federal disbursements received by the Grantee by the report end date. (Money that OEA has received from the Grantee)
- Line #10b. Cash Disbursements - Amount of Federal cash the Grantee has disbursed. (What the Grantee has paid out)
- Line #10c. Balance of Federal cash on hand. Note that if this is a final report there cannot be any cash on hand. The grantee must closeout process. It must be noted in the remarks section of the report if the Grantee has refunded any Grant funds to the U.S. Treasury.
- Line #10 d. Total Federal funds authorized. Total awarded to date
- Line #10 e. Federal Share of expenditures. This should include all expenditures/obligations, not just expenses that have been reimbursed. This should be the same as that used for the performance budget report, otherwise no comparison can be made.
- Line #10 f. Federal share of unliquidated obligations – the amount of expenses that have not been paid out to personnel, contract, or other obligations.
- Line #10 h. The unobligated balance is the balance left in the Grant. It does not include incurred expenses unless the Grantee is a non-Federal entity.
- Line #10 i. The recipient share is the total dollar amount required by the Grant Agreement or the required percentage of total program agreement on a final report, there may be a balance in line 10 k. if the Grantee did not use the full amount of the grant. If they report a percentage required. If the match has not been satisfied the PM must ask for a revision showing an increase in the match or a decrease if warranted.
- \*\*\*Note: Program Income – most OEA grants do not earn program income. If income has been earned, please contact the Compliance Officer.
- Line #11. Indirect Expenses – This section must be filled out if your Grantee has charged indirect costs. All rates and calculations must be correct. If the match does not have enough lines, an attachment must be used. The PM must make sure we have a copy of the appropriate document.

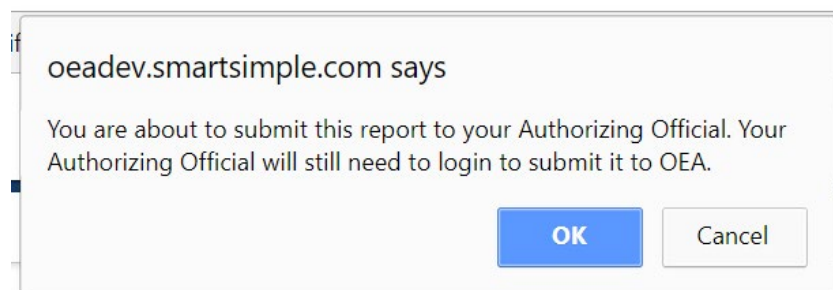




4. The form automatically calculates the following lines. At the end of the grant, there should not be any cash on hand.
  - a. **Line C:** Cash Receipt (A) – Cash Disbursements (B)
    - i. Cash Disbursements should never be negative.
  - b. **Line D:** Equals Cash Receipt (A)
  - c. **Line G:** Federal Share of Expenditures (E) + Federal Share of Unliquidated Obligations (F)
  - d. **Line H:** Total Federal Funds Authorized (D) – Total Federal Share (G)
  - e. **Line K:** Total Recipient Share Required (I) – Recipient Share of Expenditures (J)
5. Once the information is entered, click **Save** then **Close** the form.
6. The entered information will now populate on the main report screen.
7. Add any additional files under the **Supporting Documents** section.
8. At this point, the PDA will have the following options:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Submit to AO** once the grantee's review is complete and the report can be routed on to the AO.
  - c. **Return to Application** to view all of the application's details.



9. Verify that all information is correct and choose **Submit to AO**.
  - a. The status will change to "Submitted to AO."
10. Once submitted, the following notification will appear. Click **OK**.





## Authorizing Official Review

After the PDA has submitted the Federal Financial Report, the AO needs to log in and review the information.

1. Review the information to make sure it is correct and nothing further is needed.
2. Navigate to the **Activity Details** tab to sign the report.
  - a. The signature is the typed name of the AO with a date and time stamp.

**Main** **GENERAL** **ACTIVITY DETAILS**

**Notes**

Certification: By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and intent set forth in the award documents. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001):

\* Typed or Printed Name and Title of Authorized Certifying Official: Emilee Authorizingofficial

\* Signature of Authorized Certifying Official: Emilee Authorizingofficial

\* Telephone (Area code, number and extension): 123-456-7890

Email Address: emileeAO2@test.fake

3. Click **Save Draft**.
4. Open the SF 425 preview. The signature will appear on the bottom of the PDF.

SF425 - BUDGET INFORMATION - Construction Programs - Google Chrome

Secure | <https://oeadev.smartsimple.com/pdfWriter>

o. Unexpended program income (line l minus line m or line n)						\$0.00
11. Indirect Expense	a. Type	b. Rate	c. Period From	Period To	d. Base	e. Amount Charged
						f. Federal Share
						\$0.00
						\$0.00
g. Totals:						
12. Remarks: Attach any explanations deemed necessary or information required by Federal sponsoring agency in compliance with governing legislation:						
13. Certification: By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and intent set forth in the award documents. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001):						
a. Typed or Printed Name and Title of Authorized Certifying Official			c. Telephone (Area code, number, and extension)			
Emilee Authorizingofficial			123-456-7890			
b. Signature of Authorized Certifying Official			d. Email Address			
			emileeAO2@test.fake			
			e. Date Report Submitted (Month, Day, Year)			



5. The AO will have the following options:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Revision Required** for any additional information, questions, or revisions.
    - i. This returns the report to the PDA with a status of “Revisions Required.”
  - c. **Submit to OEA** once the AO’s review is complete and the report can be routed on to the PM.
  - d. **Return to Application** to view all of the application’s details.

[Save Draft](#)[Revision Required](#)[Submit to OEA](#)[Return to Application](#)

6. Click **Submit to OEA** to route the report to the Project Manager.
  - a. The status of the report will change to “Submitted to PM.”
7. The notification below will appear once the report is submitted.

**Submission Successful**

You have successfully submitted the Federal Financial Report for the following:

Grant Title: Test Grant  
Organization: Test Organization

If further assistance is needed, please contact your PM. Thank you.

## OEA Review

The assigned OEA Project Manager will review the submitted report. If any corrections are needed, the PM may return the report to the grantee.

## Revisions Required

1. The status of the report will change to “Revision Required.”

Report Type	Reporting Period	Status
Federal Financial Report	1	Revision Required



2. Complete the requested revisions based on the feedback found in the **Staff Comments** section under the **Activity Details** tab.

GENERAL    **ACTIVITY DETAILS**

---

**Staff Comments**

Revision comments for AO here.

3. The following options are available for the PDA once the revisions are complete:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Submit Revisions to AO** for the AO to review before resubmitting to OEA.
  - c. **Return to Application** to view all of the application's details.

Save Draft

Submit Revisions to AO

Return to Application

4. Click **Submit Revisions to AO**.
  - a. The status will change to "Submitted to AO."
5. The AO should review the corrected changes to verify that the PDA included all of the information OEA requested.
6. The AO will then have the following options:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Revisions Required** if the AO decides the PDA needs to include further information.
    - i. This will change the status to "Revisions Required."
  - c. **Submit to OEA** for the PM to review the corrections.
  - d. **View Application** to view all of the application's details.

Save Draft

Revision Required

Submit to OEA

Return to Application

7. Choose **Submit to OEA**.
8. Once OEA completes their review of the submitted revisions, the status will change to "Approved" and the Federal Financial Report is complete.



# Grant Amendments Tab

## Grant Amendments Layout

The **Grant Amendments** section shows all amendments for all awarded grants. The amendment letter can be retrieved by using the buttons in the column on the far right. Amendment letters will show up as a link.

Grants Management

< PROPOSED GRANTS (9)

AWARDED GRANTS

GRANT AGREEMENTS & CLOSEOUT (17)

GRANT REPORTS (78)

GRANT AMENDMENTS

#	Grant Name	Grant Number	Title of Applicant's Project	Status	Date Approved	Activity Type	Amendment Type	Activity Preview	Letters
1	<a href="#">Open</a>	Test Grant	SCON826-18-01	Test Grant	Approved	03/26/2018	Amendment	No Cost Extension; Budget Reallocation	<a href="#">Open</a>

1. Click **Open** in the far left hand column to view the activity. The tabs in the activity will be based on the amendment type. These tabs will appear on each amendment:
  - a. **Activity Details:** This contains **Open** buttons for the grant and grant amendment PDFs. There will also be a link to download the activity.
  - b. **Letters:** The letters tab will contain a link to download the activity letter.

Main

Notes

More...

GENERAL

ACTIVITY DETAILS

BUDGET ADJUSTMENT

NO COST EXTENSION

LETTERS

Amendment - Test Grant

Organization:Test Organization	Program Type: Community Investment	Project Type: Establishment or Expansion
GMS: Emilee Grantsmanagementspecialist	PM: Emilee Projectmanager	Project Number : EX826
Grant Number: SCON826-18-01	FAIN:HQ00051810000	Report Code: Quarterly
Authorizing Official: Emilee Authorizingofficial	Grant Start - End Date: 02/09/2018 - 02/08/2019	Delegated Authority: Emilee Grantee
Approved Amount: \$10,000.00	Total Paid: \$0.00	Balance Remaining: \$0.00
Obligated Federal Amount: \$5,000.00	Deobligated Federal Amount: \$5,000.00	



## Amendment Types

Amendments are an important mechanism that modify a grant at the request of the grantee, or if called for by OEA. The amendment activity covers just about every possible modification of a grant except an increase in federal money, which is a supplemental grant.

### **NOTE:**

*A grant can only have one amendment active at a given time; however, each amendment can have multiple amendment types. For example, a single amendment could include both No Cost Extension and Budget Reallocation.*

*If an amendment activity is already active in the system, it needs to be approved or declined before a new amendment activity can be started.*

The following list contains further information for all amendment types.

- **No Cost Extension**
  - Requires a new end date and an extension justification.
  - May require additional performance reports (created by OEA).
- **Change in Scope**
  - Requires details in the amendment justification.
- **Change in Base Year**
  - This is only used for BRAC grants. Contact the OEA Project Manager for more information.
- **Increase in Non Federal Funding**
  - A budget adjustment demonstrating the increase in the amount of money contributed by the grantee.
  - Requires a revised Budget Worksheet.
- **Other**
  - For requests not covered by the other listed amendment types.



- **Budget Reallocation**
  - Repositioning of or redistribution of funds within an approved amount.
  - Requires a revised Budget Worksheet to be completed.
  - Example: In an approved grant total of \$500,000 of federal (OEA) funds and \$70,000 of non-federal funds, the new reallocated budget must equal the approved totals.
- **Change in Key Personnel**
  - Add or replace key personnel individually, contacts cannot be removed at this point.
- **Decrease in Non Federal Funding**
  - A budget adjustment for a decrease in the amount of money contributed by the grantee.
  - Requires a revised Budget Worksheet to be completed.
- **Decrease in Federal Funding**
  - A budget adjustment for a decrease in the amount of money contributed by the Federal Government.
  - Requires a revised Budget Worksheet to be completed.
  - Requires a deobligation.





## Creating a New Amendment

Before creating a new amendment, verify that previous amendments have been approved. Grants can only have one amendment activity in process at a time.

1. Navigate to the **Awarded Grants** tab.
  - a. Status should be “Grant Awarded.”

Grants Management

PROPOSED GRANTS (7)

AWARDED GRANTS

GRANT AGREEMENTS & CLOSEOUT (14)

GRANT REPORTS (55)

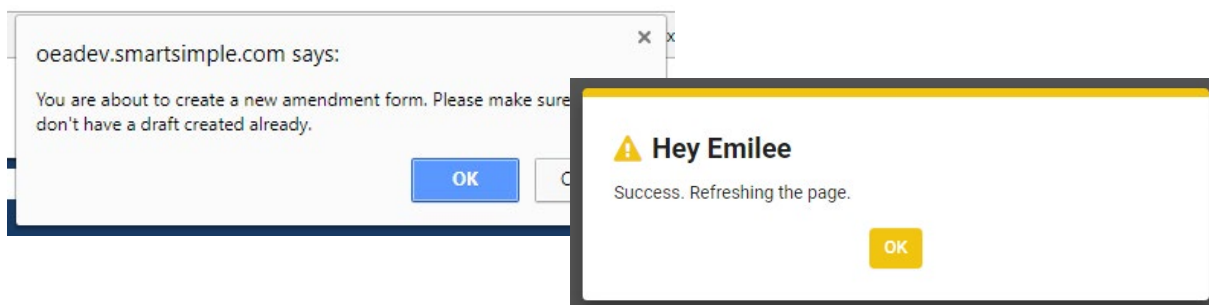
GRANT AMENDMENTS

GRANT DELIVERABLES (13)

KICK OFF MEETINGS

#	Organization Name	Grant Title	Title of Applicant Project	Grant Number	FAIN	Project Manager	Status	Amount Approved	Grant Application PDF	Actions
1	<div>Open</div> Test Organization	Test Grant	Test Grant	SCON826-18-01	HQ00051810000	Emilee Projectmanager	Grant Awarded	\$10,000.00	<div>Open</div>	<div>+ Amendment</div>

2. Click the **Add Amendment** button under the **Actions** column. Click this to create a new amendment form.
3. Click **OK** for both notifications.



4. Navigate to the **Grant Amendments** tab and open the newly created amendment activity.

Grants Management

PROPOSED GRANTS (7)

AWARDED GRANTS

GRANT AGREEMENTS & CLOSEOUT (14)

GRANT REPORTS (55)

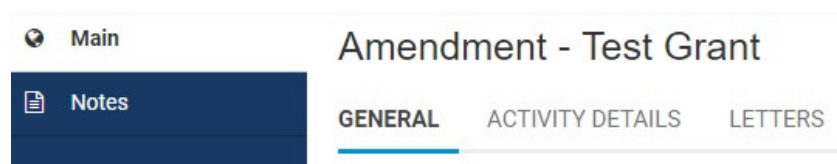
GRANT AMENDMENTS

GRANT DELIVERABLES (13)

KICK OFF MEETINGS

<

5. The activity will have three basic tabs under **Main: General, Activity Details, and Letters.**





6. Select the options under **Amendment Type** that will be included in the amendment activity.
  - a. The example below uses two common amendment types: No Cost Extension and Budget Reallocation.
7. Each selected **Amendment Type** will add a new tab to the amendment activity.

Amendment - Test Grant

GENERAL   **ACTIVITY DETAILS**   BUDGET ADJUSTMENT   NO COST EXTENSION   LETTERS

Grant Preview: [Open](#)

Activity Preview: [Open](#)

\* Amendment Type: ☒ No Cost Extension   ☒ Budget Reallocation

☐ Change in Scope   ☐ Change in Key Personnel

☐ Change in Base Year   ☐ Decrease in Non Federal Funding

☐ Increase in Non Federal Funding   ☐ Decrease in Federal Funding

☐ Other

8. Complete the required information in each tab.
  - a. Instructions for an example **Budget Adjustment** begin on page F-6.
9. At this point, the grantee will have the following options:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Submit to AO** once grantee's review is complete and the amendment can be routed on to the AO.
  - c. **Return to Application** to view all of the application's details.

[Save Draft](#)   [Submit to AO](#)   [Return to Application](#)

10. Select **Submit to AO** when the amendment is complete.
11. The two notifications below will appear. Click **OK** when prompted.

oeadev.smartsimple.com says

You are about to submit this amendment. Your Authorizing Official will need to login to submit it to OEA.

[OK](#)   [Cancel](#)

**Submission Successful**

You have successfully submitted the Amendment for the following:

Grant Title: Test Grant  
Organization: Test Organization

If further assistance is needed, please contact your PM. Thank you.



## Budget Adjustment Amendment Example

The Budget Adjustment amendment allows the grantee to create a new budget and submit to OEA for approval.

The Budget Adjustment tab will appear after choosing from four options. Each option has the same functionality in the system.

- Increase in Non Federal Funding
- Budget Reallocation
- Decrease in Non Federal Funding
- Decrease in Federal Funding

\* **Amendment Type:**

<input type="checkbox"/> No Cost Extension	<input checked="" type="checkbox"/> Budget Reallocation
<input type="checkbox"/> Change in Scope	<input type="checkbox"/> Change in Key Personnel
<input type="checkbox"/> Change in Base Year	<input checked="" type="checkbox"/> Decrease in Non Federal Funding
<input checked="" type="checkbox"/> Increase in Non Federal Funding	<input checked="" type="checkbox"/> Decrease in Federal Funding
<input type="checkbox"/> Other	

## Budget Reallocation Example

1. Choose **Budget Reallocation** from the **Amendment Type** section.
2. Navigate to the new **Budget Adjustment** tab to edit the financial information.
  - a. The provided information is pulled from the **Grant Finances** tab of the grant.

Main Amendment - Test Grant

GENERAL ACTIVITY DETAILS **BUDGET ADJUSTMENT** NO COST EXTENSION LETTERS

Budget Worksheet

[Open](#)

Budget Adjustment Details

Category	Approved - Federal	Approved - Non-Federal	Reallocated - Federal	Reallocated - Non-Federal	Variance Federal	Variance Non-Federal
Personnel	\$120,000.00	\$87,500.00			\$-120,000.00	\$-87,500.00
Fringe Benefits	\$81,500.00	\$59,500.00			\$-81,500.00	\$-59,500.00
Travel	\$5,000.00	\$5,000.00			\$-5,000.00	\$-5,000.00
Equipment	\$10,000.00	\$10,000.00			\$-10,000.00	\$-10,000.00
Supplies	\$3,000.00	\$6,000.00			\$-3,000.00	\$-6,000.00
Other Costs	\$500.00	\$300.00			\$-500.00	\$-300.00
Contractual	\$8,000.00	\$11,000.00			\$-8,000.00	\$-11,000.00
Indirect Costs	\$1,000.00	\$500.00			\$-1,000.00	\$-500.00
Grand Total						

Supporting Documents

[+](#) [-](#) [x](#)



3. There will be three sections to update:
  - a. **Budget Worksheet**
    - i. Click **Open** for a new, blank worksheet.
  - b. **Budget Adjustment Details**
  - c. **Supporting Documents**
4. Complete the new budget.
5. Click **Save** to preserve the data that was entered and **Close** the pop-up window.

### *Pro-tip:*

*The calculation for the  
Variance Federal and  
Variance Non-Federal Grand  
Totals: Amount Approved  
- Amount Reallocated =  
Variance Amount.*

**WARNING: CLICK “CLEAR” ONLY IF ALL LINES NEED TO BE REMOVED. “CLEAR” DELETES ALL LINES EVEN IF THEY WERE PREVIOUSLY SAVED.**

6. The system will update the amendment activity with the new budget details.
  - a. If the **Approved** and **Re-allocated** columns are not equal, the system will indicate the inequality with a red **X** in the Grand Total line.
  - b. There should be no variance in the total amounts with Budget Reallocation.
  - c. If there is a variance, a notification will suggest a change in **Amendment Type**.

Variance Federal	Variance Non-Federal
\$-120,000.00	\$-87,500.00
\$-81,500.00	\$-59,500.00
\$0.00	\$0.00
\$0.00	\$0.00
\$0.00	\$0.00
\$-500.00	\$-300.00
\$0.00	\$0.00
\$0.00	\$0.00
✖ Supplemental Grant for Federal Increase	✖ Select Increase in Non Federal Funding



## Authorizing Official Review

1. Navigate to the **Grant Amendments** tab and click **Open** next to the correct amendment activity.
  - a. The status will be “Submitted to AO.”

Grants Management

PROPOSED GRANTS (10)

AWARDED GRANTS

GRANT AGREEMENTS & CLOSEOUT (12)

GRANT REPORTS (77)

GRANT AMENDMENTS

GRANT DELIVERABLES (10)

x

#	Grant Name	Grant Number	Title of Applicant's Project	Status	Date Approved	Activity Type	Amendment Type	Activity Preview	Letters
1	<div>Open</div> Test Grant	SCON826-18-01	Test Grant	Submitted to AO		Amendment	No Cost Extension;Budget Reallocation	<div>Open</div>	

2. Review the information and make any necessary changes.
3. The AO will have the following options:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Revision Required** for any additional information, questions, or revisions.
  - c. **Decline Amendment** to reject the amendment based on the findings during review.
  - d. **Submit to OEA** once the review is complete and the amendment can be routed on to the PM.
  - e. **Return to Application** to view all of the application's details.

<a href="#">Save Draft</a>	<a href="#">Revision Required</a>	<a href="#">Decline Amendment</a>	<a href="#">Submit to OEA</a>	<a href="#">Return to Application</a>
----------------------------	-----------------------------------	-----------------------------------	-------------------------------	---------------------------------------

4. Select **Submit to OEA** when the amendment is ready. The following notification will appear to confirm submission was successful.

**Submission Successful**

You have successfully submitted the Amendment for the following:

Grant Title: Test Grant  
Organization: Test Organization

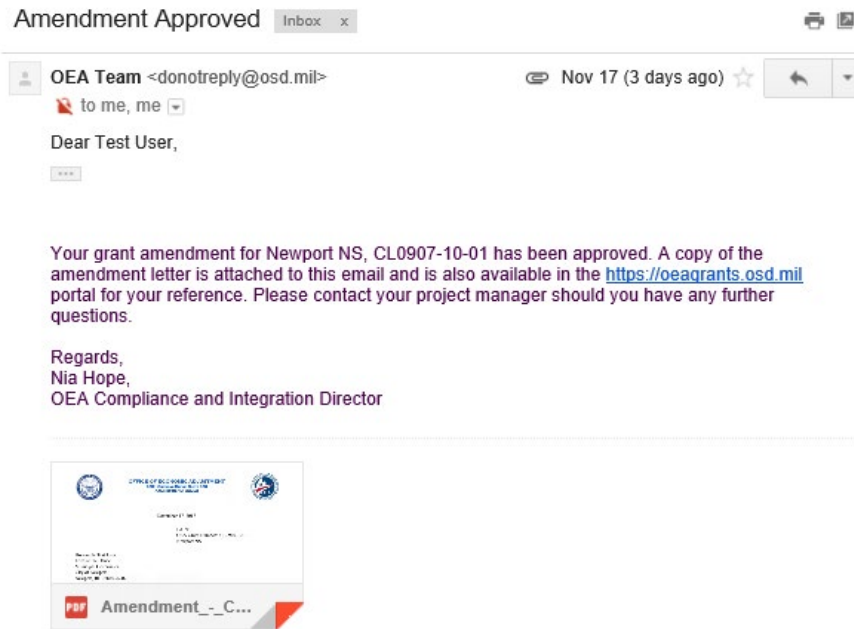
If further assistance is needed, please contact your PM. Thank you.

5. Once the amendment letter is approved, it can be accessed via the **Grant Amendments** tab.



## OEA Review

OEA will complete a review of the submitted grant amendment. Once the OEA Director has approved the grant amendment, both the PDA and AO will receive a confirmation email with the amendment letter attached.









# Grant Deliverables Tab

## Grant Deliverables Layout

The **Grant Deliverables** tab contains all deliverables for all awarded grants assigned to the grantee. The Deliverable Name column next to the **Open** button on the left displays the type of deliverable.

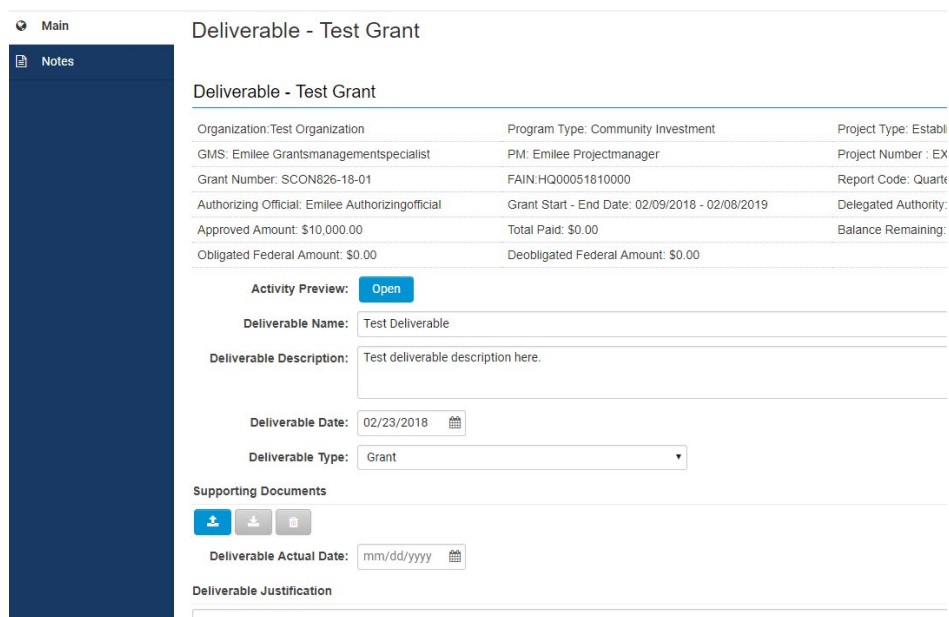


Grants Management					
◀ PROPOSED GRANTS (7)   AWARDED GRANTS   GRANT AGREEMENTS & CLOSEOUT (14)   GRANT REPORTS (55)   GRANT AMENDMENTS <b>GRANT DELIVERABLES (1)</b> ▶					
#	Deliverable Name	Grant Name	Deliverable Date	Deliverable Description	Status
1	<a href="#">Open</a> Test Deliverable	Test Grant	02/23/2018	Test deliverable description here.	Scheduled

## Completing a Grant Deliverable

During the grant process, grantees are required to submit evidence of deliverable completion. Follow the steps below to complete a deliverable.

1. Open the home page and navigate to the **Grant Deliverables** tab.
  - a. The deliverable status changes from “Entered” to “Scheduled” when the grant is awarded.
2. Click **Open** next to the correct deliverable.



Main

Notes

### Deliverable - Test Grant

Deliverable - Test Grant

Organization: Test Organization	Program Type: Community Investment	Project Type: Establ
GMS: Emilee Grantsmanagementspecialist	PM: Emilee Projectmanager	Project Number : EX
Grant Number: SCON826-18-01	FAIN: HQ00051810000	Report Code: Quar
Authorizing Official: Emilee Authorizingofficial	Grant Start - End Date: 02/09/2018 - 02/08/2019	Delegated Authority:
Approved Amount: \$10,000.00	Total Paid: \$0.00	Balance Remaining:
Obligated Federal Amount: \$0.00	Deobligated Federal Amount: \$0.00	

Activity Preview: [Open](#)

Deliverable Name: Test Deliverable

Deliverable Description: Test deliverable description here.

Deliverable Date: 02/23/2018

Deliverable Type: Grant

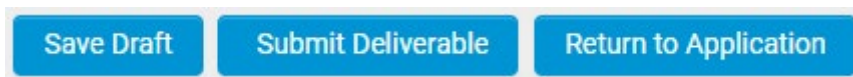
Supporting Documents

Deliverable Actual Date: mm/dd/yyyy

Deliverable Justification



3. Once the deliverable is opened, the activity will appear with various grant details listed across the top. These details will include the assigned OEA staff members and financial information such as approved amount and total paid.
4. Upload the supporting documents for the deliverable and enter the **Deliverable Actual Date** and **Deliverable Justification**.
5. Once the grantee has finished entering information, the following options will be available:
  - a. **Save Draft** to save any changes made and continue working later.
  - b. **Submit Deliverable** to submit the requested deliverable.
  - c. **Return to Application** to view all of the application's details.



6. Select **Submit Deliverable** to submit to OEA.

### Project Manager Review

Once the deliverable has been submitted to OEA, the Project Manager will review the deliverable for completion.



# Kick Off Meetings Tab

## Kick Off Meetings Layout

The **Kick Off Meetings** tab contains a list of the meetings that the grantee has been included on for all awarded grants. This activity provides the community access to specific kick-off materials tailored by the PM.

Grants Management						
< AGREEMENTS & CLOSEOUT (1)		GRANT REPORTS (5)		GRANT AMENDMENTS		KICK OFF MEETINGS
Grant Title		Grant Number	Activity Type	Status	Kick Off Date Scheduled	Time Scheduled
Open	Test Grant	SCON885-18-01	Kick Off Meeting	Complete	04/27/2018	10:30:00

## Completing a Kick-off Meeting

The Project Manager will create kick-off meetings for their respective grants. Kick-off meetings usually occur at the start of a grant with a new grantee.

1. Navigate to the **Kick Off Meetings** tab and open the one for the correct meeting.
  - a. The scheduled date and time are listed under the tab.

Main

Notes

More...

Kick Off Meeting - Test Grant

GENERAL

ACTIVITY DETAILS

Activity Type:

Kick Off Meeting

Status:

Draft

Activity Owner:

Emilee Projectmanager

Assigned People:

Emilee Projectmanager

Emilee Authorizingofficial

Emilee Grantee

Kick Off Meeting - Test Grant

Organization: Test Organization	Program Type: Community Investment	Project Type: Establishment or Expansi
GMS: Emilee Grantsmanagementspecialist	PM: Emilee Projectmanager	Project Number : EX826
Grant Number: SCON826-18-01	FAIN: HQ00051810000	Report Code: Quarterly
Authorizing Official: Emilee Authorizingofficial	Grant Start - End Date: 02/09/2018 - 02/08/2019	Delegated Authority: Emilee Grantee
Approved Amount: \$10,000.00	Total Paid: \$0.00	Balance Remaining: \$5,000.00
Obligated Federal Amount: \$5,000.00	Deobligated Federal Amount: \$0.00	

Grant Type:

Original Grant



2. Underneath the **Activity Details** tab, the grantee can see the activity PDF, the materials repository, a section for uploading meeting materials, and the agenda.
  - a. **Activity Preview/PDF:** Click **Open** next to Activity Preview to view a PDF of the kick-off meeting. A link to the PDF is also provided for download.
  - b. **Kick Off Meeting Materials Repository:** Click the **Meeting Materials** button to open a pop-up window. These are all of the materials that the Project Manager has made available to the community.
  - c. **Kick Off Meeting Materials:** Upload any additional documents that were a part of the kick-off meeting here.
  - d. **Kick Off Meeting Agenda:** The Project Manager will have entered agenda items into this section. Make corrections if necessary.

GENERAL
**ACTIVITY DETAILS**

---

Activity Preview:
 Open

Is travel required?:

**Kick Off Meeting Materials Repository**

Click the button to see the meeting materials

Meeting Materials

**Kick Off Meeting Materials**

Upload
Download
Delete

\* Kick Off Date Scheduled: 04/27/2018

\* Time Scheduled: 10:30:00

\* Kick Off Meeting Agenda

Source | Cut | Copy | Paste | Undo | **B** *I* U | Bulleted List | Numbered List | Decrease Indent | Increase Indent | Quote |

3. The community user will have the following options once they have reviewed the kick-off meeting activity:
  - a. **Save Draft** if any changes were made to the kick-off meeting.
  - b. **Return to Application** to view all of the application's details.

Save Draft
Return to Application



# Supplemental Grant

Supplemental grants are submitted using the same workflow as the original grant application (Section B - Proposed Grants). The supplemental grant only requires two reports: Final Performance Report and Federal Financial Report.

Supplemental grants are to be used for an increase in federal funding so they are not considered an amendment. The supplemental grant will be linked to the original grant in the system.

## Project Manager Creates Supplemental

The Project Manager at OEA will create the supplemental grant application.

## Grantee Completes Application

1. Once the PM has sent the supplemental grant invite to the grantee, it can be found under **Proposed Grants** on the grantee's main page.

Grants Management						
<div>PROPOSED GRANTS (1)   AWARD GRANTS   GRANT AGREEMENTS &amp; CLOSEOUT (17)   GRANT REPORTS (78)   GRANT AMENDMENTS   GRANT DELIVERABLES (17)</div>						
<div>test supp</div>						
#	Project Title	Organization	Primary Contact	Funding Program	Status	
1	Test Supplemental Grant	Test Organization	Emilee Grantee	Non-Construction	GA signed - Awaiting obligation	<div>Open</div>

2. Open the draft and complete the application by entering the required information.
  - a. The process is the same as filling out an initial grant. Reference the **Filling Out an Application** section on page B-6.
    - i. **Application (SF 424)**: Instructions on page B-7.
    - ii. **Application Narrative**: Instructions on page B-9.
    - iii. **Budget**: Instructions on page B-12.
    - iv. **Assurances and Certifications**: Instructions on page B-25.

### NOTE:

*All supplemental grants require a new budget.*



**Test Supplemental Grant**

**Grant Type:** Non-Construction

**\* Organization Name:** Test Organization

**\* Project Manager:** Emilee Projectmanager

**AO Name:** [Emilee Authorizingofficial](#)

**Associated Grants:** Test Grant SCON826-18-01 - Test Organization - HQ00051810000 - \$5,000.00

**Project Type:** Establishment or Expansion

**Finances:** [Financial Summary](#)

**Grant Preview:** [Open](#)

**Grant Number:** EX826-18-03 ?

**FAIN:** HQ00051810001 ?

**\* Grant Title:** Test Supplemental Grant

**\* Primary Delegated Authority:** Emilee Grantee ?

**Status:** GA signed - Awaiting obligation

**Is this a Supplemental Application?:** Yes

**Project Name:** Test Project

**Project Number:** EX826

**Navigation:** APPLICATION (SF 424) | APPLICATION NARRATIVE | BUDGET | ASSURANCES AND CERTIFICATIONS | FINAL SIGNATURE

3. Once the application is completed, follow the instructions under **Submitting an Application to OEA** on page B-26.

- a. The notification below will appear once the supplemental grant has been submitted.

#### Submission Successful

You have successfully submitted your grant application. You will receive an acknowledgement of receipt email shortly.

Grant Title: Test Grant  
Organization: Test Organization  
Submission Date: 2018-02-09 19:49:43

#### NOTE:

*Please work closely with the assigned OEA Project Manager throughout the supplemental process.*



## Supplemental Review

The supplemental grant will undergo the same review process as the original grant.

### OEA Review

The supplemental application will be reviewed following the same workflow as the original grant application (B-28):

- The supplemental will be reviewed by the following OEA staff members: Program Director, Grants Management Specialist, and Project Manager.
- A TRC will be scheduled. Any revisions needed from the grantee will be discussed at the TRC.
- The Deputy Director, Compliance & Integration (DDC&I) Director and OEA Director will both review the Grant Agreement.

### Authorizing Official Review

The Authorizing Official will be notified via email to download and submit the counter-signed Grant Agreement before the award becomes official (D-2).







# Payments

Payments are currently made outside of the OEA Grants Portal. Follow the steps below to complete the payment process.

1. Navigate to the **Payment** tab of the OEA Grants Portal to access the forms.
  - a. SF 270
  - b. SF 271
  - c. SF 3881 (Automated Clearing House/ACH form)

The screenshot shows a web interface with a dark blue header labeled "Instructions". Below the header, a white box contains the text: "These forms are provided for your convenience only. The OEA Grants System DOES NOT accept payment information. Please download and complete the forms as needed and submit to OEA payment mailbox as directed by your Project Manager." Below this text is a section titled "PAYMENT FORMS" with a blue underline. Under this section, there are three white rectangular buttons with blue borders, labeled "SF 270", "SF 271", and "SF 3881" from left to right.

2. Prior to submitting the payment request, verify the following:
  - a. The organization's information in SAM (System for Award Management, <https://www.sam.gov>):
    - i. Legal Name
    - ii. DUNS Number
    - iii. Bank Account Number
    - iv. Routing Number
  - b. That the SF 3881 OEA has on file matches the information in SAM.
3. Email the completed payment form (SF 270 or SF 271) to the OEA payment mailbox: **osd.ncr.odam.mbx.oea-payments@mail.mil**
  - a. Include the OEA grant number and grant title in the subject line.
  - b. Copy the assigned OEA Project Manager.

## NOTE:

*Contact OEA as soon as possible if any changes are made to the organization's bank account information or SAM.*





# Appendices

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## Acronyms

### User Roles

- **AO:** Authorizing Official
- **BO:** Budget Officer
- **CC:** Community Contact
- **DDC&I:** Deputy Director, Compliance & Integration
- **DIR:** Director
- **ER:** External Reviewer
- **GMS:** Grants Management Specialist
- **OGC:** Office of General Counsel
- **PD:** Program Director
- **PDA:** Primary Delegated Authority
- **PM:** Project Manager

### Program Types

- **BRAC:** Base Realignment and Closure
- **CEA:** Community Economic Adjustment
- **CI:** Community Investment
- **CU:** Compatible Use
- **DIA:** Defense Industry Adjustment
- **RTA:** Research and Technical Assistance

### Other

- **DAI:** Defense Agencies Initiative
- **DBAG:** Also known as the PO Number
- **DoD:** Department of Defense
- **DUNS:** Data Universal Numbering System
- **EADS II:** Economic Adjustment Data System II
- **FAIN:** Federal Award Identification Number
- **LRA:** Local Redevelopment Authority
- **OEA:** Office of Economic Adjustment
- **UID:** Unique Identifier



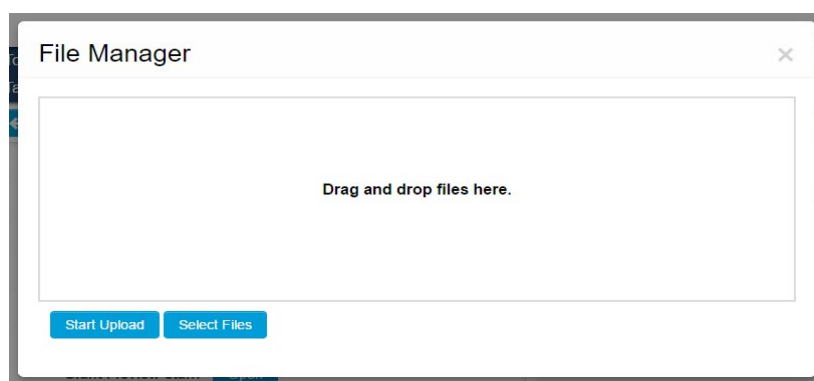
## File Uploader

There are various points in the OEA Grants Portal where the user can upload pertinent documents. The system generally only allows PDFs, but in certain areas Excel and Word documents can be uploaded (e.g., a detailed budget in Excel). The instructions below will apply to all file uploaders in the system.

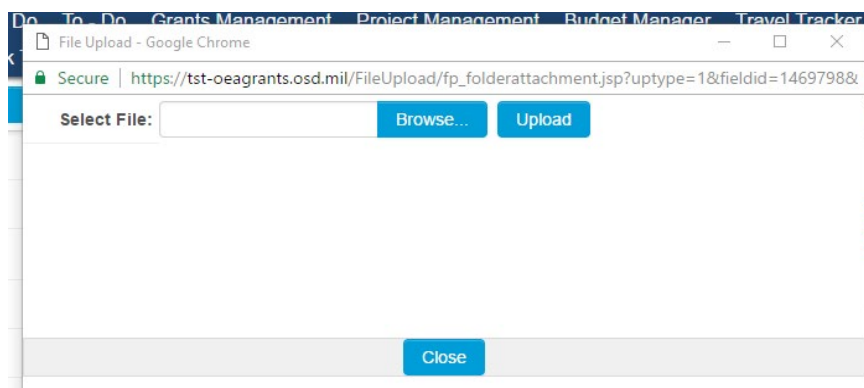
1. Choose between uploading multiple or single files and click the corresponding button.



2. Click **Multiple Files** to open this pop-up window. Either drag and drop the desired files, or click **Select Files**.

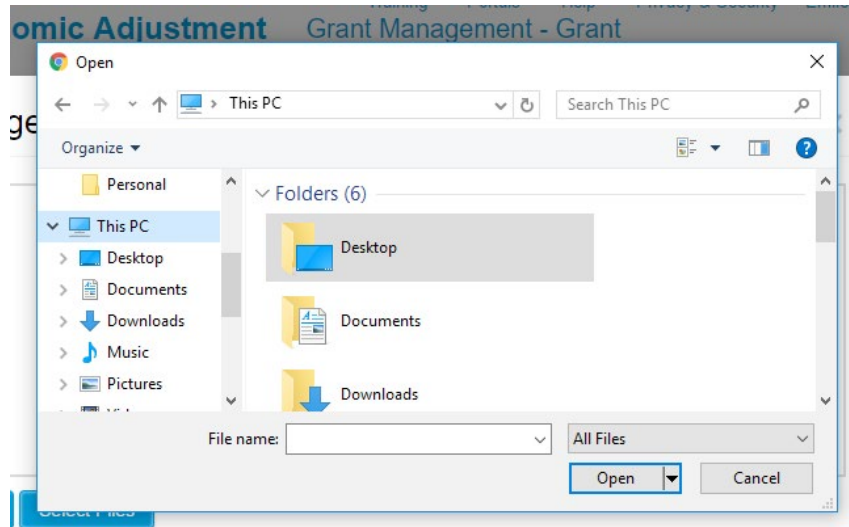


3. Once the files are chosen, click **Start Upload** to upload the documents into the portal.
4. Click **Single File** to open this pop-up window with no drag and drop option.





5. Click **Browse**. The system will bring up the file explorer window. Navigate to the correct folder and select the file to upload.
6. Click **Open** when the file is selected.



7. Once the files are uploaded either using the multiple or single option, save the activity or grant to ensure the documents are not lost.



## Notes Tool

The Notes tab will generally be near the top of the left hand menu in all grant and activity screens. Information entered in the Notes tool is not automatically included in the application; instead it acts as a record to summarize changes.

1. Click the **Notes** tab to open and close the feature.
  - a. Clicking **Expand** will open the notes feature in a new window.
2. Click the **Add** button to create a new note.

3. Select the correct type of note.

4. Click into the blank space and enter the information.
5. Once entered, there will be two options:
  - a. **Save** to save the new note.
  - b. **Cancel** to remove the information and leave the Notes tool.

6. Once the note is saved, it will appear in the Notes tool.





7. The **edit** button to the right allows the user to edit or delete the note after it is saved.

Notes Type: -- All -- From: To: [Search]

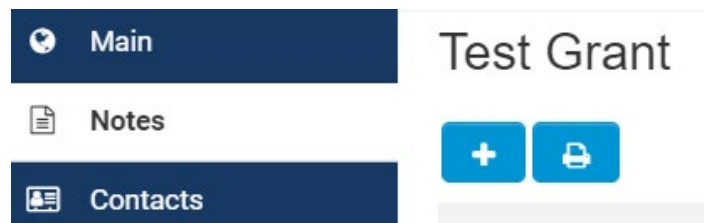
1 January 30 2018 9:10PM [Edit]

Text for note goes here.

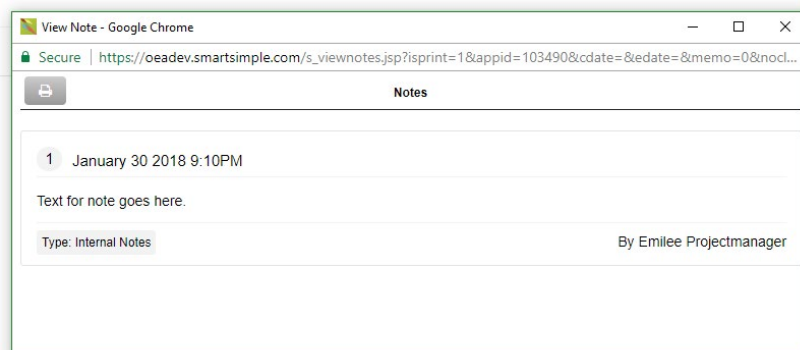
Type: Internal Notes By Emilee Projectmanager

## Printing From the Notes Tool

1. Click the print icon.



2. A pop-up box will appear. Click the print icon again to choose printer settings.





## System Rules

1. Add OEA email addresses as a safe sender to ensure all email notifications are received.
2. When users are logged into the OEA Grants Portal, multiple windows within the same browser type can be opened at a time.
3. All sections with a red asterisk require information before the system will move to the next status in the workflow.

\* Type of Submission: ☐ Preapplication ?  
☒ Application  
☐ Changed/Corrected Application

\* Type of Application: ☒ New ?  
☐ Continuation  
☐ Revision  
☐ Other

4. Hover over question marks throughout the system for a pop-up explanation of the field being completed.

\* Type of Submission: ☐ Preapplication ?  
☒ Application  
☐ Changed/Corrected Application

\* Type of Application: ☒ New ?

New: "This is the default and should be selected for all new applications" Continuation: Requests for changes and increases in funding are handled with Amendment." Revision: "All revisions are handled through Amendments."

☐ Other

5. Per DoD policy, the OEA Grants Portal will log the user out automatically after 15 minutes of inactivity. The portal will provide a 30 second warning when the session is about to time out.

