

Advanced Training – Reverse Actions (Walk Back an Award)

Indian Health Service

February 22, 2024

Greetings



Fun Fact: I am a singer and aspiring actor who has been in quite a few movies and series.

Housekeeping



Microphones are open – please mute if not speaking



Webinar is being recorded and will be available at a later time



Training is in our training environment



Enter questions in the chat or ask by phone during the designated question time



Documentation on training topics is available



Tell us how we did in the survey

Objectives



Delete the Draft Notice of Award



Reject the Funding Memo



Delete the Funding Memo



Withdraw an Application in Review



Return an Application



Uncomplete an Application

Course Agenda

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

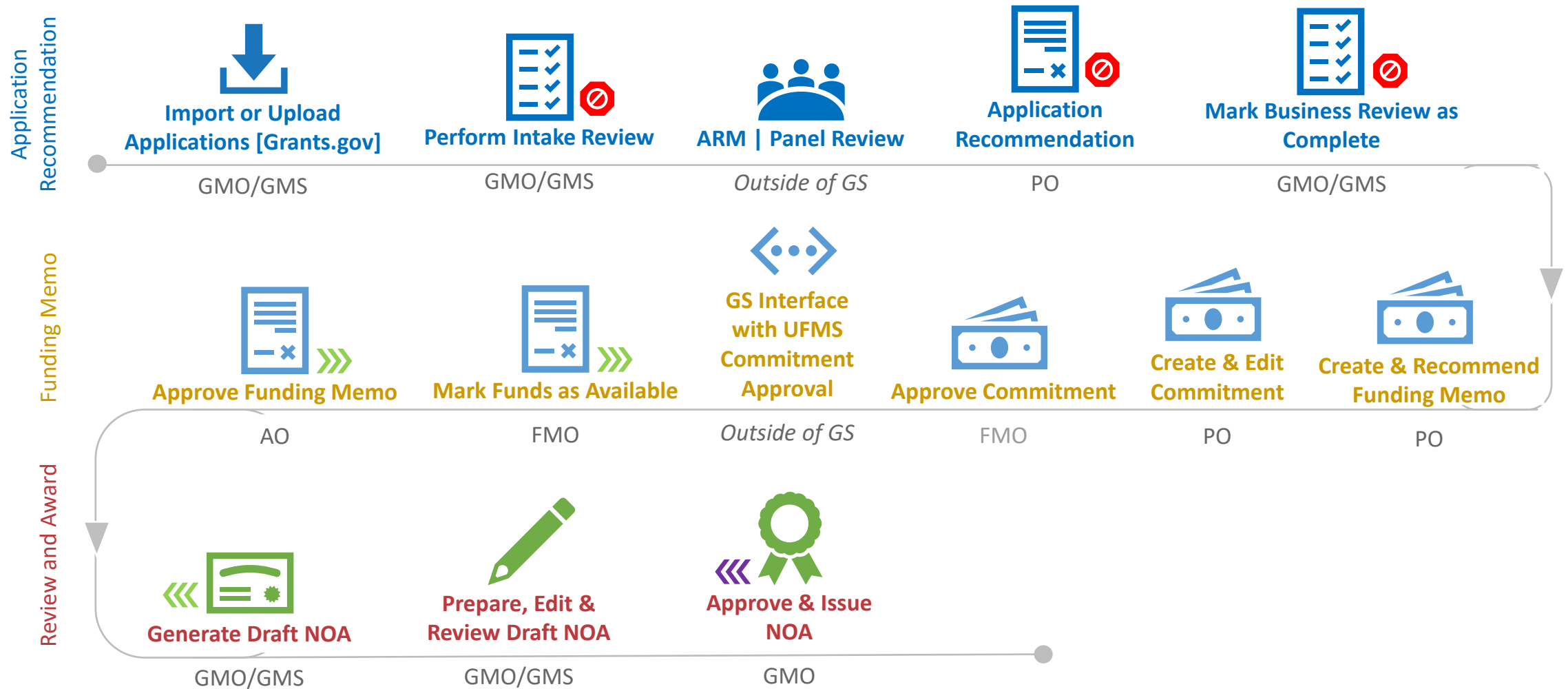


Introduction

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



Introduction: IHS New Competitive Award Workflow



Option to disapprove. This stops the process.



Option to return Funding Memo to draft.



Option to return NOA to draft.

A large, dark blue ink splatter or blotch is centered on a white background. The splatter has irregular, feathered edges with some smaller droplets and speckles trailing off from the main mass. The text is centered within the dark blue area.

WALKING BACK A NEW DRAFT AWARD

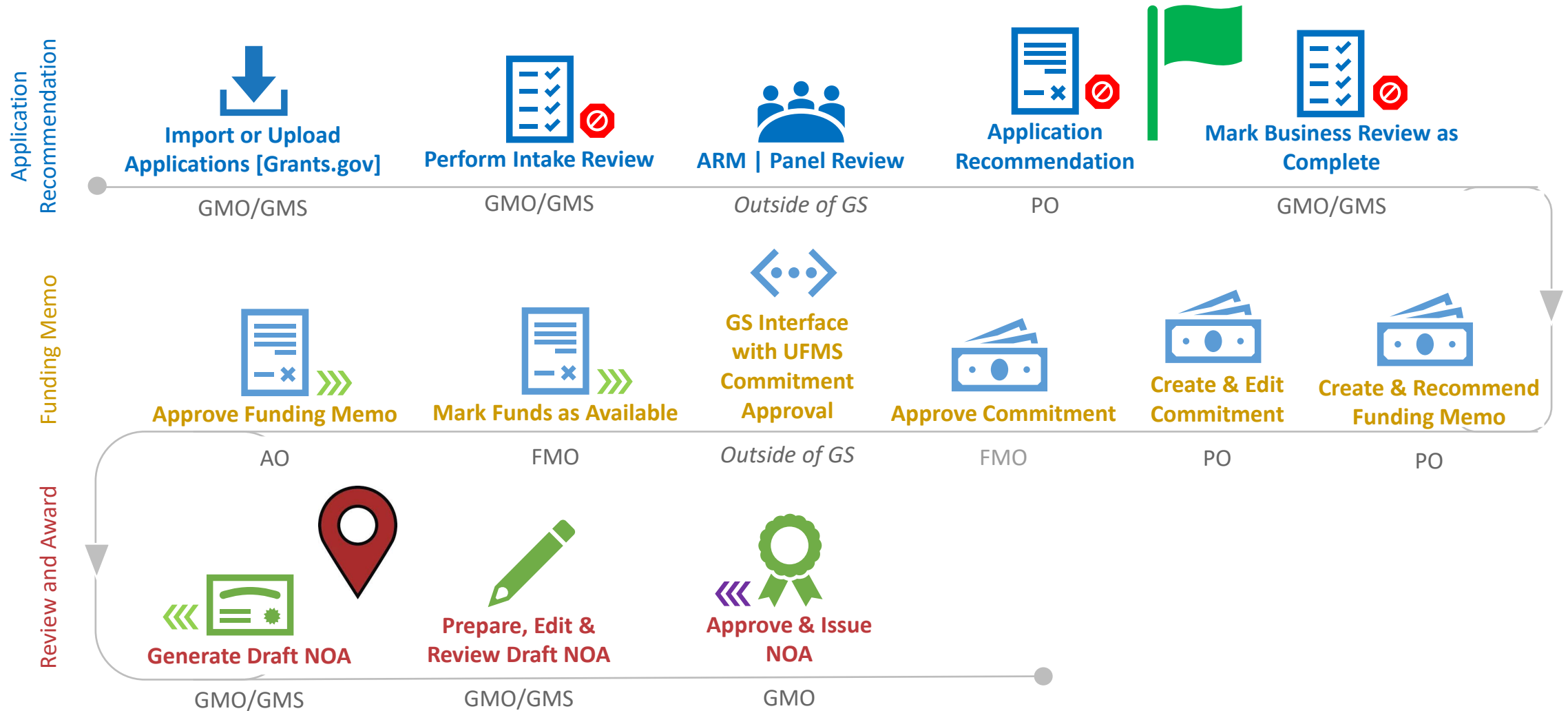
Scenario 1: Walk back a New Draft Award to the Application Recommendation screen

You Are Here

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



Introduction: IHS New Competitive Award Workflow



Option to disapprove. This stops the process.



Option to return Funding Memo to draft.



Option to return NOA to draft.

Steps to Walking back



Delete the Draft
NOA

Reject the
Funding Memo

Delete the
Funding Memo

Change
Application
Recommendation

Notifications

The roles that receive the notification as follows:

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

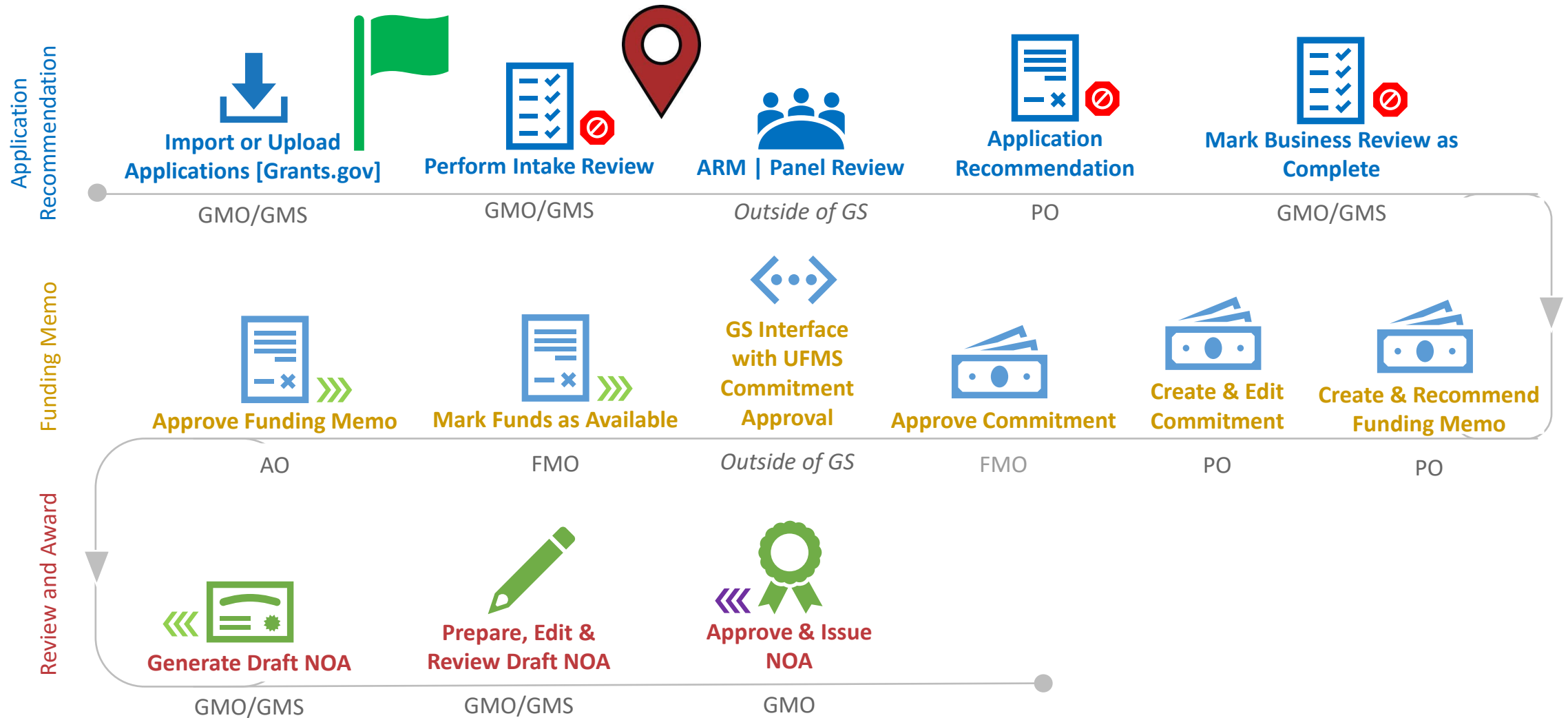
Scenario 2: Withdraw a New Application from the Review Process

You Are Here

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



Introduction: IHS New Competitive Award Workflow



Option to disapprove. This stops the process.



Option to return Funding Memo to draft.



Option to return NOA to draft.

Notifications

The roles that receive the notification as follows:

Action	Role
Withdraw Review	GMO actively assigned to the project

Amendment Workflow with Funding Memo



 Option to disapprove. This stops the process.

 Option to return Amendment to draft.

A large, dark blue ink splatter or blotch is centered on a white background. The splatter has irregular, feathered edges with some smaller droplets and speckles trailing off to the left and right. The text is centered within the darkest part of the splatter.

WALKING BACK AN AMENDMENT

Scenario 3: Uncomplete an Amendment Application

You are here

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



Steps to Uncompleting an Amendment Application



Delete the Draft
NOA

Reject the
Funding Memo

Uncomplete the
Amendment
Application

Delete the
Funding Memo



Amendment Workflow with Funding Memo



 Option to disapprove. This stops the process.

 Option to return Amendment to draft.

Notifications

The roles that receive the notification

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

Optional: Delete an Amendment

- With Federal staff-initiated amendments, there is also the option to delete an amendment if, for example, the wrong amendment was chosen.
- The amendment application can be deleted in the Received (Post Award Paper Submission) status (by both the GMO and GMS) and in the Complete (Post Award) status (by only the GMO).

Manage Amendments

Grant Number P20AB00134

Grantee Name University of Hawaii Systems

Project Title Training Announcement - CESU GP

Project Start Date 08/01/2020

Project End Date 07/31/2021

Last Issued NGA 08/25/2020 [\(View NGA\)](#)

Amendment #	Status	Submitted Date	Type	Budget Period	Funds Requested	Funds Approved	Funding Memo Required	Action
							Funding Memo Status	
CESU-P2020000285	Complete (Post Award)	08/31/2020 07:56:11 AM	DOI - Deobligate/re-obligate funds	1 08/01/2020 - 07/31/2021	N/A	N/A	No N/A	View Amendment Delete Amendment Disapproval Funding Memo Set Budget Period Budget Worksheet Grant Notes History Send Message

NewClose

Optional: Disapprove an Amendment

- With Recipient and Federal initiated amendments, there is also the option to disapprove an amendment application
- The amendment application must be in the Complete (Post Award) status and can be done by GMO, GMS
- A record of this disapproval can be found on the (Grant) History screen

Manage Amendments

Grant Number

P20AB00134

Grantee Name

University of Hawaii Systems

Project Title

Training Announcement - CESU GP

Project Start Date

08/01/2020

Project End Date

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Last Issued NGA

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New

Close

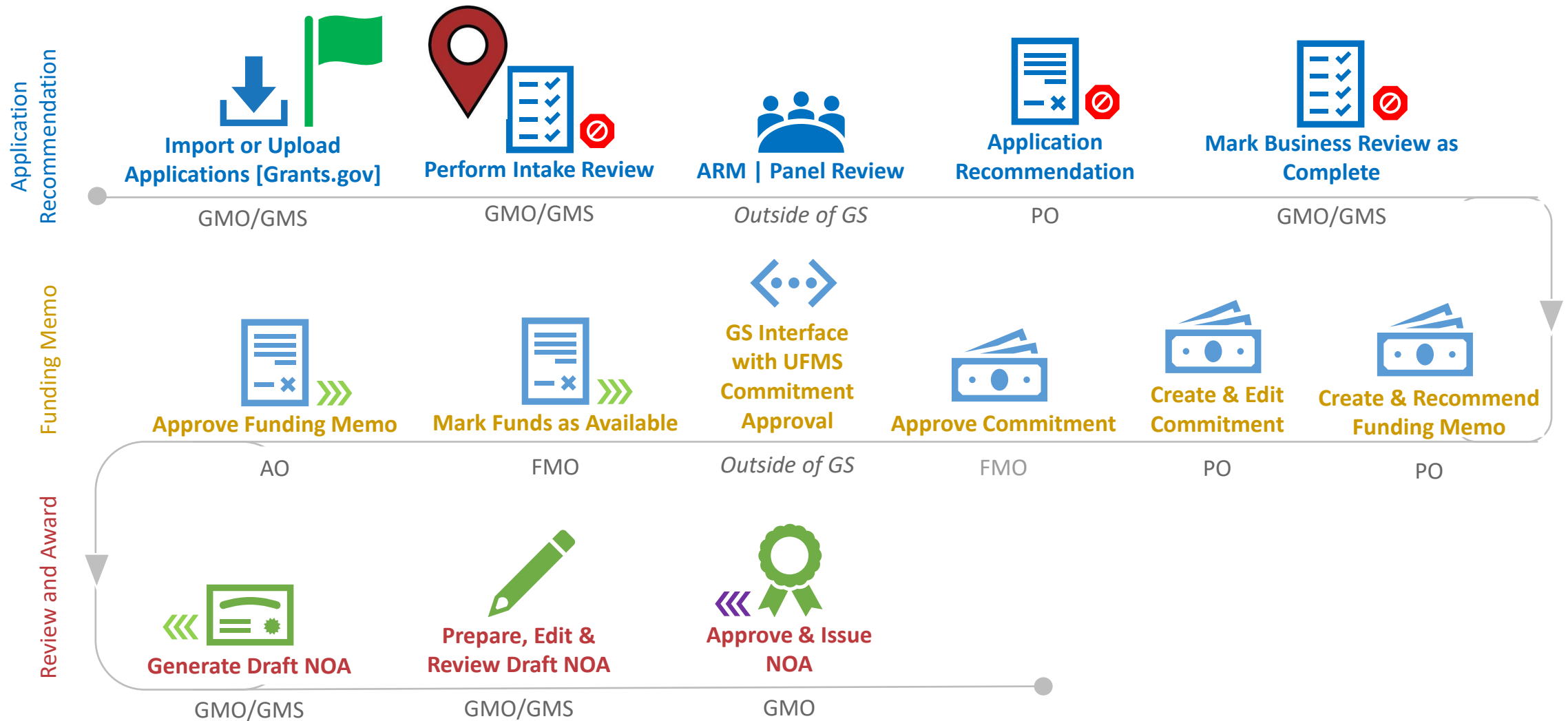
Scenario 4: Return an Application

You Are Here

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



Introduction: IHS New Competitive Award Workflow



Option to disapprove. This stops the process.

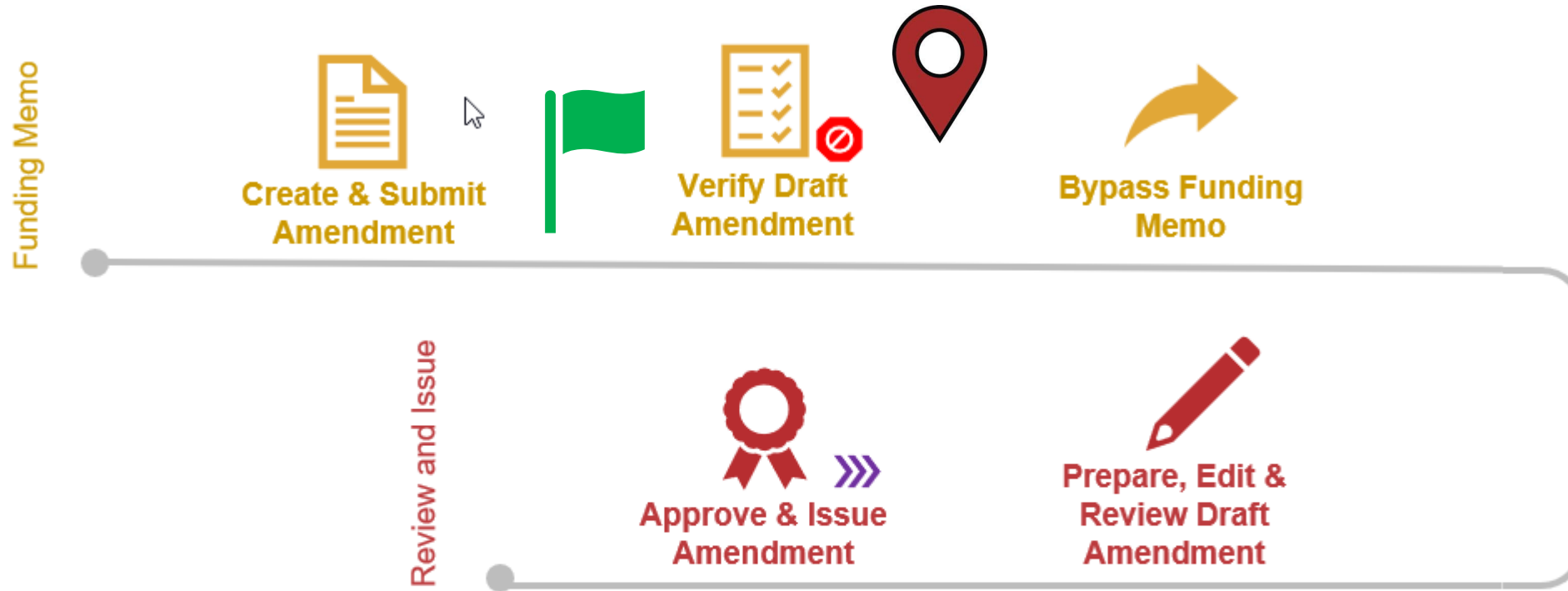


Option to return Funding Memo to draft.



Option to return NOA to draft.

Monetary Amendment Approval



 Option to Stop the process.

 Option to return Amendment to draft.

Notifications

The roles that receive the notification

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

Questions?



Follow-Up Materials

- Link to recording
- Provide your feedback about today's training. Your valuable input will help to tailor future trainings with you in mind:

[Survey Link](#)



Resources

- Quick Sheet Return Directed Supplements or Competitive Applications
- Quick Sheet Disapprove, Delete, or Return an Amendment with a Draft NOA
- Funding Memo Approval/Rejection



Thanks for attending!

