



## GMS Support Toolkit for LDDs

For NBRC applicants and awardees from 2024 onward, all applications, record-keeping, and grants management and administration activities will occur within the Grants Management System (GMS).

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### IMPORTANT NOTE BEFORE YOU START:

#### **If assisting during the application phase:**

ensure the applicant has sent a request for review to you within the system. NBRC’s application guidance includes instructions for completing this step.

#### **If assisting after an award has been made:**

ensure the grantee has sent at least one request for review to you within the system—we suggest they request review of a progress report (can be done any time after their budget period has started). NBRC’s GMS Grantee Toolkit has instructions for completing this step.

***Initiating these requests is the mechanism that will ensure you have access to the broadest range of project and account information.***

### Navigating Records in the GMS

We strongly recommend familiarizing yourself with the “Basic Navigation” of the GMS Grantee Toolkit on NBRC’s [Resources](#) page. There is useful information describing where to look for uploaded files, correspondence, activity status, and more.



## Standard Support Tasks

From your homepage (🏠), you will see a menu of options to the left. (This document does not go over any of the Pre-Application menu items because LDDs do not have access to these records at this time).

### View and Complete Pending Tasks

If a grantee or applicant has requested your review of an application, progress report, amendment request, or reimbursement request, this is where you can see a list of those requests that have not been completed.

EGMS ID	Task Type	Subject	Created By	Due Date	Status	Actions
PR-NBRC-0003	Review Recipient Pre...	Review Recipient Pre...	Mary Jackson	02/22/2024	In Progress	👁️
PR-GT-Test-00003-011	Review Recipient Progr...	Review Grantee LIZ PL...	Zen trope	05/30/2024	In Progress	👁️
CR-AD-Test-08-01	Review Recipient Ame...	Review Recipient Ame...	Mary Jackson	05/31/2024	In Progress	👁️
PR-FDTHA-05	Review Recipient Reim...	Review Grantee Demo ...	Harry Jenkins	06/12/2024	In Progress	👁️
CR-AD-510TE-03-01	Review Recipient Ame...	Review Recipient Ame...	Zedd Ext	07/31/2024	In Progress	👁️
PR-CAT13-00	Review Recipient Reim...	Review Grantee State ...	Zedd Ext	02/28/2025	Not Started	▶️

Total Records: 6

1. Under Task Type, you can see which type of record they are requesting an LDD review of
2. Under the Status column, you will be able to tell what request is “In Progress” or “Not Started”
3. Clicking the green eye (👁️) or the green play button (▶️) under the Actions column will take you into the specific record needing review
4. You can view and edit any information related to that record (Image on next page)
5. When you’re ready to complete your review:
  - a. Go to LDD Support tab
  - b. In the Local Development District Support section, click the orange pencil icon (✎️) under the Actions column



Amendment Request  
**Food and Energy Appl\_5/22** **Edit**

EGMS ID: AD-Test-08-01      Status: Submitted for LDD Review      Initiated By: NBRC

**4** **5**

Created Sent to Grantee Submitted for LDD Review LDD Reviewed Submitted for Approval Approved

Overview **LDD Support** Files History Collab

**Local Development District Support**

#	Reviewer Name ↑	Organization	Description	Due Date	Allow Record Editing	Status	Action
1	Morgan SME	Bradly Education	d	05/31/2024	Yes	Sent for Review	<b>Action</b>

6. In the pop-up window:
  - a. Select “Passed” under Rating
  - b. Include any additional comments for the grantee
  - c. Click the Save button
  - d. Click Submit Review

**6** Application Review

**Save**

\* Required to Save    \* Required to Submit

**Details**

\*Rating  ⓘ

Passed

Review Type  ⓘ

Program

**Save**

Application Review

**Edit** **Submit Review**

**Details**

Rating  ⓘ

Passed

Review Type  ⓘ

Program

Review Date

01/15/2025 1:36 PM

**Edit** **Submit Review**

Comments  ⓘ

Reviewed and content looks good, ready to submit

Reviewed by

Morgan SME

7. If you refresh the page, the Status of the review will change from “Sent for Review” to “Submitted”. The task will also be moved to your Completed Tasks section.

**Local Development District Support**

#	Reviewer Name ↑	Organization	Description	Due Date	Allow Record Editing	Status
1	Morgan SME	Bradly Education	d	05/31/2024	Yes	<b>Submitted</b>

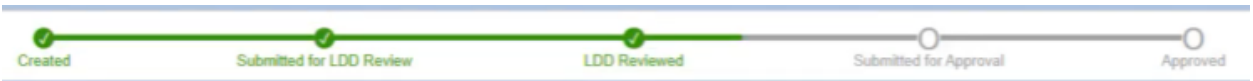


- The grantee will then have the option of resending to you for additional review (which will generate and send a new Pending Task) or marking the LDD Review as complete and submitting.

*Note: The grantee is not notified when you complete your review, we suggest you send them a note through the Collab Tab. Additionally, it is the grantee’s responsibility to click the “Complete Review” button in the upper right corner for the progress bar to move to “LDD Reviewed.”*

Grantee buttons:

Progress Bar:



## Completed Tasks

This is where you can see all the LDD reviews that you have completed in the past.

EGMS ID	Task Type	Subject	Completed Date	Status	Actions
PR-NBRC-...	Review Recipient Pre-App...	Review Recipient Pre-Application for Ann...	02/13/2024, 12:13...	Completed	
PR-NBRC-...	Review Recipient Pre-App...	Review Recipient Pre-Application for Ann...	02/13/2024, 12:28...	Completed	
PR-NBRC-...	Review Recipient Pre-App...	Review Recipient Pre-Application for Ann...	02/14/2024, 04:03...	Completed	
PR-NBRC-...	Review Recipient Pre-App...	Review Recipient Pre-Application for Ann...	02/14/2024, 04:56...	Completed	
PR-NBRC-...	Review Recipient Pre-App...	Review Recipient Pre-Application for Ann...	02/15/2024, 09:56...	Completed	

- By clicking the green eye, you can view the record that you reviewed.



## Application Reviews

▲ Applications

Search...

Showing 1 to 5 of 5 records

EGMS ID	Application Title	Opportunity Title	Applicant Organization	Application Due Date	Assigned To	Status	Actions
AP-NBRC-032	NBRC MANU T...	NBRC MANU T...	Casey Test Org	05/31/2024, 04:04 PM	Casey Haynes	LDD Reviewed	
AP-NBRC-041	Application De...	Application UAT...	Casey Test Org	09/29/2024, 08:00 PM	Casey Haynes	Review Initia...	
AP-NBRC-018	Application UAT...	Application UAT...	Casey Test Org	09/29/2024, 08:00 PM	Casey Haynes	Review Initia...	
AP-NBRC-017	NBRC_Announc...	NBRC_Announc...	Testing Org 123	04/12/2024, 05:00 PM	ABC XYZ	Review Initia...	
AP-NBRC-024	NBRC Announc...	NBRC Announc...	Casey Test Org	07/31/2024, 09:54 AM	Casey Haynes	Review Initia...	

In this section, you will be able to see all the applications you were asked to review. Click on green eye icon () under Actions to view the application record. *You will also receive an email notifying you that a review has been requested, with the subject line “Notification: You are requested to Review the Application.”*

**Note:** You can sort or filter this list to view applications with the “Converted to Award” status to narrow it down to projects which were awarded funding.

1. Click the filter button at the top right of page ()
2. Fill out the filter like this and click the green + under Action:

Column Name	Operator	Value	Action
Status	Equals to	Converted to Award	

**Reminder:** Ensure the applicant has sent a request for review to you within the system. NBRC’s application guidance includes instructions for completing this step.

If an LDD review was not requested within the GMS during the application phase, the LDD will not be able to see application record in the GMS after the fact. See NBRC’s GMS Application guidance for more detailed information about what can be found on the application record. Below are some additional ways an applicant can get you information from the application record:

- Application files – applicant can re-upload any application files into their current award record
- Application Project Narrative – the applicant can click the three horizontal lines at the top-right of their application record () and click “Download as PDF” to share original project narrative details

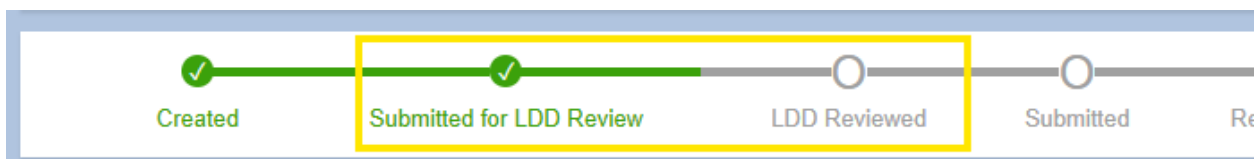




## Adding Files to Amendment Request, Progress Report, and Reimbursement Request Records

Once a grantee requests a review from the LDD of an amendment request, progress report, or reimbursement request, LDDs can add files to these records. *Currently, LDDs cannot add files to Application records.*

**Note:** Requests must be in Submitted for LDD Review or LDD Reviewed “status” for LDDs to add files. LDDs cannot add files in the Created status of a record.



### Types of Files LDDs can consider uploading:

- **For Amendment Requests:** It depends on type of request, but files such as an Authorized Official Resolution, a SF424cbw budget form, or any other supporting documents needed to fulfill the amendment request requirements.
- **For Progress Reports:** There are no required files needed for a progress report, but supporting files such as photos can be added by LDDs.
- **For Reimbursement Requests:** Files, such as invoices and receipts, are only needed during a desk review which occurs on the first request and then one other time during the life of the grant. Please review the “Uploading Files” section under “Basic Navigation” as well as the “Reimbursement and Desk Review” section of the GMS Grantee Toolkit ([here](#)) for more detail on how to help a grantee complete this task.

Under each of these record types you will click on the **Files** or **Forms and Files** tab. From there you will see a green “Add Files” button.

Progress Report  
EGMS ID: PR-GT-CAT-00050-001  
Status: Submitted for LDD Review  
Award ID: AD-CAT-51

Created | Submitted for LDD Review | LDD Reviewed | Submitted to Grantor | Submitted for Approval | Approve

Overview | Performance | **Forms and Files** | LDD Support | History | Collab

All Forms

Supporting Documents Checklist

Progress Report Files

**Add Files**

Title	Classification	File Extension	Description	Created Date	Actions



## Additional Navigation

These are additional records that you can view once your review has been initiated.

## Applicant/Grantee Organization's Account

For more detailed information on what can be viewed within this record, refer to “Managing GMS Account and Contacts” guidance on NBRC’s [Resources](#) page.

Grantee Organization			
LIZ PLP RANCH LLC <span>Edit</span>			
Status	EIN	UEI	
Active	333333333	JXZKY64AYNF1	
<b>Overview</b>   Related Log   Risk Assessment   Files   Collab			
<b>Description</b>			
Address Line 1	Address Line 2	City	
5450 PIONEER 13TH ST		CLEWISTON	
State	Congressional District	Zip Code	
USA	018	33440	
Country	County	Organization Type	
USA		Business or Organization	
Website	UEI	SAM.Gov Expiration Date	
<a href="https://nbrgrants-uat.sandbox.my.site.com/">https://nbrgrants-uat.sandbox.my.site.com/</a>	JXZKY64AYNF1	06/08/2024	
Cage Code	Phone	Vendor Id	
	(888) 908-9990	RG-000163	
Organization DBA			
<b>Additional Information</b>			
Authorized Official	Fiscal Year Start Date	Fiscal Year End Date	
Zen Trope	01/01	12/30	
Last Audit Year			
<b>Additional Addresses</b>			
<b>Contacts</b>			
Showing 1 to 3 of 3 records <span>New</span>			

### Get to the Organization Account from:

- Application Reviews menu > hyperlinked name under Applicant Organization column
- Award record > **Overview Tab** > Grantee Information section
- Grant record > **Overview Tab** > Grantee Information section

### Under the **Overview Tab**:

1. Description section > Organization address
2. Additional Information section > Authorized Official
3. Contacts section > organization contacts (Note: each project has its own contacts section that will likely appear different from this table)



## Grant Record

Example:

Grant View  
**5/10 test sp**

EGMS ID GT-510TE-00003	Status Active	Active Award AD-510TE-03
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**Overview** Awards \$ Budget \$ Actuals Requests Management Files History Collab

▼ Grant Information

▼ Grantee Information

▼ Grant Description

▼ Period of Performance

▼ Budget Period Details ⓘ

### Get here from:

- Award Record

## Adding Files to the Grant Record

LDDs can add files to the Grant Record on behalf of the grantee. This record persists for the life of the grant; it is important that only “one-time” files are added to this record, such as the Partial Notice to Proceed/Notice to Proceed documentation:

- LDD Contract
- NEPA Intake Form
- Form 1002 Certification of Match Commitment

**Note:** Only add FINALIZED, SIGNED forms to this record; no draft forms. If you want NBRC or the grantee to review a form before it is added to the grant record, you can use the **Collab Tab** to send a draft version of the form as an email attachment.



## Award Record

Example:

**Award**  
**5/10 test sp**

EGMS ID AD-510TE-03	Status Activated	Grant ID GT-510TE-00003	Budget Period 7/31/2024 - 9/11/2024
------------------------	---------------------	----------------------------	--

Overview
\$ Budget
\$ Actuals
Management
Terms
Performance
Files
History
Collab

▼ Award Information  
▼ Grantee Information  
▼ Award Description  
▲ Contacts/Key Personnel

Showing 1 to 1 of 1 records

Project Role	Name ↑	Email	Is Key Personnel	Is User	Actions
Project Director/Manager	Zedd Ext	zedd113@yopmail.com	✓	✓	

Total Records:1

### Get here from:

- Grant record
- Any of the Amendment Request, Progress Reports, or Reimbursements list views or via any of those individual records

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

Pre-Applications

LDD Reviews

Pre-Application Reviews

Application Reviews

Amendment Requests

Progress Reports

**Amendment Requests**

Search...

Showing 1 to 5 of 5 records

EGMS ID	Award EGMS ID	Amendment Types	Initiated By	Status	Created Date ↓	Actions
CR-AD-510TE-03-01	AD-510TE-03	Scope of Work Change	Grantee	Submitted to Grantor	07/17/2024 2:26 PM	
CR-AD-FDTHA-06-03	AD-FDTHA-06	Funding Change	NBRC	Force Closed	05/31/2024 7:01 AM	
CR-AD-FDTHA-06-01	AD-FDTHA-06	Scope of Work Change	NBRC	Force Closed	05/31/2024 7:00 AM	
CR-AD-FDTHA-01-00	AD-FDTHA-01	Budget Period Change	Grantee	Approved	05/30/2024 2:11 PM	
CR-AD-Test-08-01	AD-Test-08	Funding Change	NBRC	Submitted for LDD Review	05/23/2024 10:37 AM	

Total Records:5



# Northern Border Regional Commission



## NBRC's GMS Record Funnel

This diagram shows how the GMS records are nested within each other and what information, files, changes, and submissions that occur in each record. Additionally, it shows how LDDs get access to what records. The Organizational Record is the largest bucket which holds all other nesting records. If an organization were to have more than one grant award, it would be an additional separate bucket with nesting records under the Organizational Record.

**Key:**

- Yellow Boxes - indicates files and links that can be found in that record
- Purple Boxes - indicates changes and submissions that occur in that record
- Red Boxes - Touchpoints in the GMS where an LDD can access grantee records
- Red Text - indicates files/records/information an LDD can see/access when entering through the LDD Access Touchpoints
- Key icon - the actions within the GMS that give LDDs the "key" to get into grantee records.

