



Northern Border Regional Commission

NEW Grantee Orientation: GMS Navigation





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Forest Economy, Timber for Transit & USDA
- Adrienne Harrison, Program Manager, Catalyst
- Elizabeth "Liz" Cross, Rural Healthcare Coordinator
- Jennifer Barrett, Program Coordinator
- Sarah Lang, Capacity Program Coordinator

Meet your NBRC Team Today!

- **Ace Arroyo**, Data & Finance Analyst
- **Stephanie Case**, Grant Administrator



Reminders for today



Today's training session will be recorded



Please keep your microphone muted unless you are asking a question during the Q&A!



Use the CHAT! Introduce yourselves! Share: your name, organization and NBRC grant project name



The slide deck will be made available along with the resources discussed



We will do our best to spare some time for Q & A!



New Grantee Training Sessions

- 1 Welcome & Next Steps: Grant Agreements, LDDs, PNTP/NTP
- 2 PNTP/NTP
- 3 Compliance (Reporting) & Reimbursements
- 4 **GMS Navigation****
- 5 **Amendments & Closeout****

On Demand Training!

National Environmental Policy Act (NEPA)

[NEPA Resources](#)

Build America Buy America Act(BABAA)

[BABAA Resources](#)



Session 4: Grants Management System (GMS) Navigation

Topics

- Introduction
- Navigation Terms
- Foundations (30 min)
- GMS Walk-through: important pages and records (45min)
- Asking for help (5 min)
- Q&A



GMS: Introduction

- **Coming Soon: Video walk-throughs** for “how to process in the GMS”: reporting, payment requests, and amendments.
- There are **many** paths to find items in the GMS.
- This presentation will provide language, introduce foundations, and provide screenshots so you can ask questions and get to a resolution sooner. Make sure to share with your peers or replacements (**especially authorized officials**).
- Review how to utilize resources such as the **Grantee Toolkit (step-by-step)** and the **Compliance Manual (rules)**.
- Lastly: Use this resource to “refresh” before you file reports or request payment or amendments!



GMS: Navigation Terms

- **Vertical Menu** – menu on left hand side of the screen.
- **Action Buttons** – the “eyeball”, arrow, and pencil icons next to items in tasks and records.
- **Award** – holds budget info, progress requests (annual reports SF425, progress reports, and payment requests SF270).
- **Contacts** –Does NOT mean the contact has an active user license. FYI, LDD’s must be associated with an award.
- **Horizontal Menu** – menu on top of the screen that contains tabs.
- **Filter** – multiple sections have filters. The results in that section may change.
- **Grant** – holds all awards (amendments) and shows status. Technically also lists payment, amendment/change, and close out requests.
- **Tab** – collection of sections, tables, and/or pages.



GMS: Navigation Terms

- **Organization Page** – for grantees, lists all contacts. Not all contacts are activated users – see user roles.
- **Page** – contains related information and may have multiple pages grouped under a tab. Processes will occur on pages.
- **Page Tab** – a sub section page that groups together sections.
- **Pending Tasks** – items assigned to a specific end user. When something is done out of order or a new user is added those tasks may not appear in the pending tasks but can still be found.
- **Progress Bar** – for some processes such as an application or amendment, you'll see multiple steps with a green line indicating completion.
- **User Roles:** primary (authorized official) and the other primary can edit. AO primary should submit items. If there is a secondary, instead of another primary, they can review items.
- **Table** – smallest part of a page or tab. May also be referred to as a section.



GMS: Foundations

Grants Management System (GMS)

**Northern Border
Regional Commission**

Enterprise Grants Management System

 Grants Portal 

 Opportunities Applications Grants Monitoring Closeout 

 Search



All 

 Tasks

My Tasks

Pending Tasks

Completed Tasks

 Activities

Organization

Organization Profile

 Recently Viewed

State Capacity Grant Pro...

State Capacity Grant Pro...

Catalyst Program Fall 20...

State Capacity Grant Pro...

Jennifer Testing Experie...

Jennifer Testing Experie...

Jennifer Testing Experie...

Task Summary By Phase

Opportunities	0
Applications	1
Grants	0
Monitoring	12
Closeout	1

Task Summary By Due Date

Late	14
Due within 7 Days	0
Due within 30 Days	0
Due in more than 30 Days	0

My Feed 

**Test AB Refresh — REI Admin**
(Northern Border Regional Commission GovCloud Plus Org)
AB Refresh Hi Grantee User!
[Comment](#) · [Unlike](#) · July 16, 2025 at 12:16 PM

You like this.

**AB Refresh**
Hi Admin!
[Like](#) · July 16, 2025 at 12:18 PM

 Accessibility Policy | Privacy Policy | Disclaimers | 508 Compliance 



GMS: Foundations

Horizontal menu: consists of page tabs. Clicking each **will change the vertical menu options**.

Northern Border Regional Commission **Enterprise Grants Management System**

Horizontal menu options: Home, Opportunities, Applications, Grants, Monitoring, Closeout, Chat

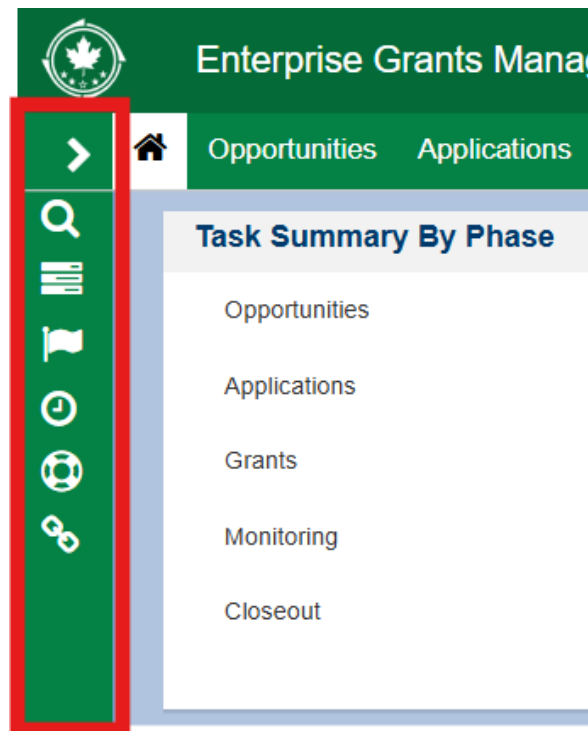
Search bar: Search...

Task Summary By Phase		Task Summ
Opportunities	0	Late

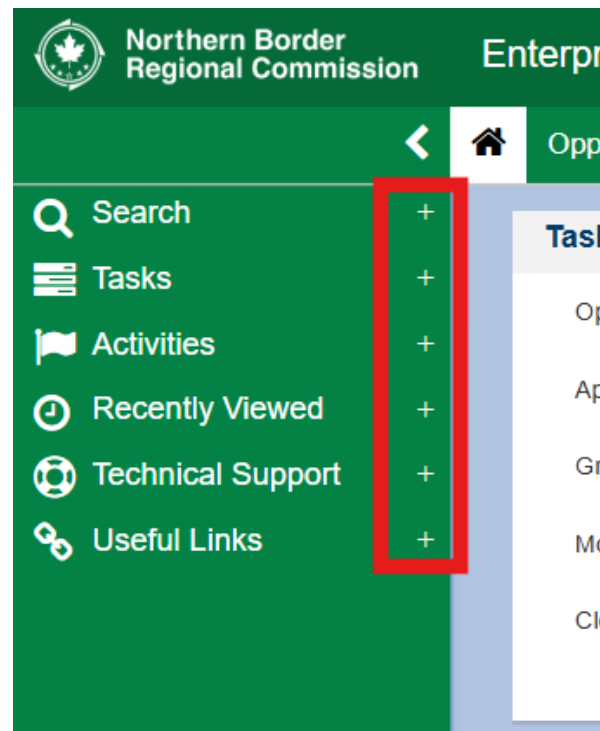


GMS: Foundations

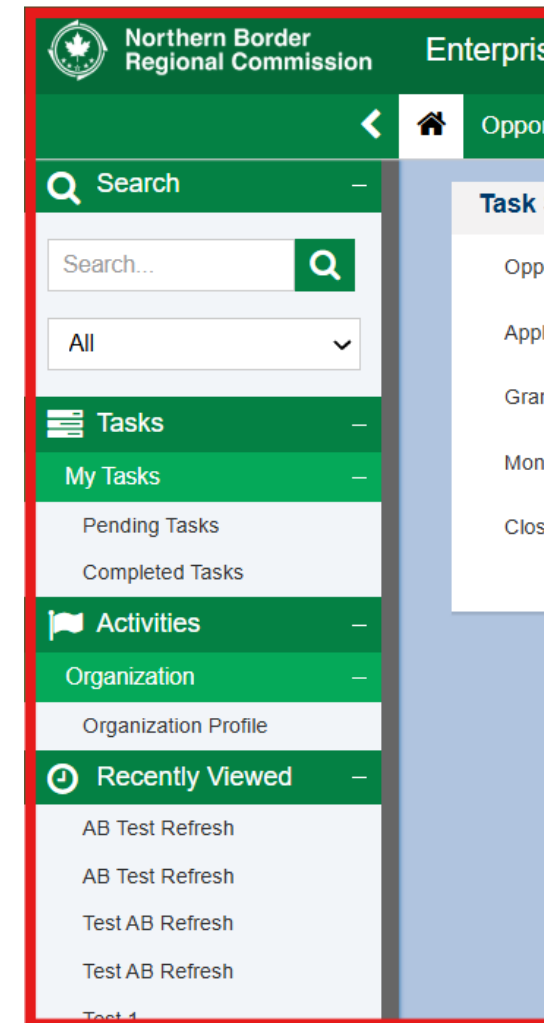
1. Vertical Menu Collapsed



2. Vertical Sub Menus Collapsed



3. Vertical Menu Fully Expanded





GMS: Foundations

Page tabs: Home, Grants, Monitoring, etc.

Enterprise Grants Management System

Navigation tabs: Home, Opportunities, Applications, Grants, Monitoring, Closeout

Search: Search... All

Task Summary By Phase	
Opportunities	0
Applications	1
Grants	0

Task Summary
Late
Due within 7 Days
Due within 30 Day



GMS: Foundations

- Selecting options in the **horizontal menu will change the vertical menu options.**
- Project information flows between menus, but may be different depending on your selection

Enterprise Grants Management System

Grants Portal

Home Opportunities Applications Grants Monitoring Closeout

Search

Search...

All

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

Organization

Recently Viewed

State Capacity Grant Pro...

State Capacity Grant Pro...

Catalyst Program Fall 20...

State Capacity Grant Pro...

Task Summary By Phase	
Opportunities	0
Applications	1
Grants	0
Monitoring	12
Closeout	1

Task Summary By Due Date	
Late	14
Due within 7 Days	0
Due within 30 Days	0
Due in more than 30 Days	0

My Feed

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(Northern Border Regional Commission GovCloud Plus Org)
AB Refresh Hi Grantee User!
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You like this.

AB Refresh
Hi Admin!
[Like](#) · July 16, 2025 at 12:18 PM

Home Page



GMS: Foundations

- Home page tab → Pending Tasks
- Pending Tasks = Action items

Northern Border Regional Commission Enterprise Grants Management System

Home Opportunities Applications Grants Monitoring Closeout

Search

Search... [Search Icon]

All [Dropdown Arrow]

Tasks [Minus]

My Tasks [Minus]

Pending Tasks [Minus]

Completed Tasks [Minus]

Activities [Minus]

Organization [Plus]

Recently Viewed [Minus]

State Capacity Grant Pro...

Pending Tasks (Assigned To Me)

Search... [Search Icon] [Info Icon]

Showing 1 to 10 of 14 records

EGMS ID	Task Type	Subject	Created By	Due Date	Status	Actions
PR--GT-ABTR-00001-002	Complete Grantor Perfo...	Complete Performance ...	REI Admin	06/30/2025	Not Started	[Green Arrow]
PR--GT-ABTR-00001-004	Send Back for Revisions	Revise Progress Report...	Adrianne Harrison	10/01/2025	Not Started	[Green Arrow]
PR--GT-ABTR-00001-005	Send Back for Revisions	Revise Progress Report...	Adrianne Harrison	10/01/2025	Not Started	[Green Arrow]
PR--GT-ABTR-00001-006	Complete Grantor Perfo...	Complete Performance ...	REI Admin	01/01/2026	Not Started	[Green Arrow]
PR--GT-ABTR-00001-007	Complete Grantor Fede...	Complete Federal Finan...	REI Admin	02/12/2026	Not Started	[Green Arrow]
PR--GT-ABTR-00001-008	Complete Grantor Perfo...	Complete Performance ...	REI Admin	02/12/2026	Not Started	[Green Arrow]
PR--GT-ABTR-00001-009	Complete Grantor Perfo...	Complete Performance ...	REI Admin	02/12/2026	Not Started	[Green Arrow]

[All] Pending Tasks Table



GMS: Foundations

Records Relationships

Grantee Organization

Grant "GT"

Award "AD" 1 Original (Amended)

Award "AD" 2 (Active)

Grant Agreement

Progress Report "PR"

Annual Report "PR" (SF425)

Payment Request "PR" (SF270)



GMS: Foundations

Organization Profile → Project Contacts including Authorized Official (AO)

Northern Border Regional Commission Enterprise Grants Management System

Grants Portal

Opportunities Applications Grants Monitoring Closeout

Search

Search... All

Tasks My Tasks Pending Tasks Completed Tasks Activities Organization Organization Profile Recently viewed Test AB Refresh Test AB Refresh

Additional Addresses

Address Type	Address Line 1	City	State	Country	Zip Code
No records found					

Contacts

Showing 1 to 2 of 2 records

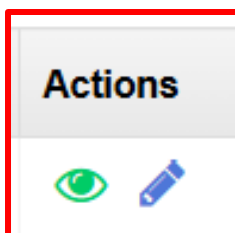
Full Name ↑	Role	Email	Phone	Status ⓘ	Is User ⓘ	Actions
AB Refresh	Primary			Active	✓	 
Asiel Arroyo				New	✗	  

Total Records: 2

SAM.gov Verification ⓘ

Verify

Verification Source	Verification Type	Status	Recorded date ↓
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Green Eye=VIEW
Pencil=EDIT.



GMS: Foundations

Grants → Filter defaults to Active, **more options** are available

Northern Border Regional Commission Enterprise Grants Management System

Grants - Active

Showing 1 to 2 of 2 records

EGMS ID	Grant Title	Grantor Organization	Project Period ↑
GT-ABTR-00001	AB Test Refresh	Northern Border Regional Commission	6/30/2025 - 7/1/2026
GT-U26NM-00001	USDA Residual Test JB	Northern Border Regional Commission	8/18/2026 - 8/18/2029

Total Records: 2

The double arrow is a filter. Remember this for menus!

Grants - Active

- Grants - All
- Grants - Pending
- ✓ Grants - Active
- Grants - Rejected
- Grants - Closed

Filter for active grants

EGMS ID	Grant Title	Grantor Organization	Project Period ↑
GT-ABTR-00001	AB Test Refresh	Northern Border Regional Comm...	6/30/2025 - 7/1/2026
GT-U26NM-00001	USDA Residual Test JB	Northern Border Regional Comm...	8/18/2026 - 8/18/2029

Total Records: 2



GMS: Foundations

Grant Record → Tabs

Navigation bar: Planning, Announcements, Applications, **Grants**, Monitoring, Closeout, [Icons]

Grant: **USDA Residual Test JB** [Settings/Menu Icon]

EGMS ID GT-U26NM-00001	Status Active	Active Award AD-U26NM-01
---------------------------	------------------	-----------------------------

Status Bar

Created [Progress Bar] Active [Progress Bar] Closed/Completed [Progress Bar]

Legend: Incomplete (Grey), Complete (Green), Reject (Red)

Page Tabs

Overview | Budget | Awards | Actuals | Requests | Management | Files | History | Collab

Grant Information [Settings Icon]

Grant Title USDA Residual Test JB	Grant Type Directed	Funding Organization Northern Border Regional Commission
Grant Abbreviation ⓘ U26NM	Internal Program ⓘ PG-NBRC-0009	Grant Issue Date ⓘ 08/19/2026

Grant Issue Date=Date of obligation



GMS: Foundations

Award Record → Tabs

Navigation bar: Planning | Announcements | Applications | Grants | Monitoring | Closeout

Award: **AB Test Refresh**

EGMS ID: AD-ABTR-04 | Status: Activated | Grant ID: GT-ABTR-00001 | Budget Period: 6/30/2025 - 7/1/2026

Status Bar

Legend: Incomplete (Grey), Complete (Green), Reject (Red)

Progress: Created (Complete) → Sent for Acceptance (Complete) → Accepted (Complete) → Submitted for Approval (Complete) → Approved (Complete) → Pending Activation (Complete) → Activated (Complete) → Amended (Incomplete) → Closed (Incomplete)

Page Tabs: Overview | Budget | Actuals | Management | Terms | Performance | Responsibilities | Files | History | Collab

Page Tabs



GMS: Most Common Issue

Contacts Management

Each organization can have **two active users** (active licenses). Either:

Two Primary Users. One of which is the Authorized Official (AO). Both can access and edit. Only the AO should officially approve and submit.

Or

One Primary User (AO) and one Secondary User. Both can access and edit. Only the primary (AO) should officially approve and submit items.

AO Changes:

You must submit an Authorized Official Resolution (or provide SAM.gov verification), via a Key Personnel Amendment in the GMS. A new grant agreement must be generated with new AO contact information. Reference the Grantee Toolkit and Compliance Manual.



GMS: Common Issue

GMS Access: Role=Primary or Secondary, status= Active, Is User = ✓

Totally lost about contacts? Start with your LDD. Then, escalate to admin@nbrc.gov a key contacts form **and** the authorized official resolution (or sam.gov verification) that names the new AO, by a given authority to manage the NBRC grant. Which is signed by a person who is empowered by the respective organization – and who is **not** the AO **(you can't self appoint)**.

▲ Additional Information ⓘ

Authorized Official AB Refresh	Fiscal Year Start Date	Fiscal Year End Date
Last Audit Year		

▲ Additional Addresses ⓘ New ≡

Address Type	Address Line 1	City	State	Country	Zip Code
No records found					

▲ Contacts ⓘ New ≡

Showing 1 to 2 of 2 records

Full Name ↑	Role	Email	Phone	Status ⓘ	Is User ⓘ	Actions
AB Refresh	Primary			Active	✓	



GMS: Live walk-through

Paths to important pages/records

- Organization
- Grant
- Award
- Amendments (Change Requests)
- Progress Reports
- Annual Reports
- Payment Requests



GMS: Asking for help.

- Reach out to your LDD first.
 - Provide your **grant** ID (GT ID #)
 - Goal, e.g. submitting reimbursement request.
 - Problem: steps to **replicate** issue.
 - List everyone involved, email everyone involved.
 - **Provide screen shots**
 - Zoom out - showing the whole page.
 - Zoom in - showing specific details.
- *Then* escalate to admin@nbrc.gov.



Next Up:

- 1 Welcome & Next Steps: Grant Agreements, LDDs, PNTP/NTP
- 2 PNTP/NTP
- 3 Compliance (Reporting) & Reimbursements
- 4 GMS Navigation
- 5 Amendments & Closeout**

TO DO:

- ✓ Achieve NTP
- ✓ Monitor project compliance
- ✓ Submit for reimbursement

3

NOTICE TO PROCEED

*To be completed within 1 year of
award*



Questions?





Grantee Resources

[LINK to NBRC Resources](#)

GMS Grantee Toolkit

- [GMS Grantee Toolkit.pdf](#)
- Locating records, uploading files, and completing required revisions, communication with NBRC
- Support on next award phases including grant agreements, amendments and progress reporting

Other Forms

- [Authorized Official Resolution.pdf](#)
- [Key Contacts Form.pdf](#)

Grant Administration Compliance Manual

- Details on award process and project initiation activities
- Guidance on procurement, reporting, reimbursements, and more...

Federal Requirements for Awards

- [2 CFR Part 200 – Requirements for Federal Awards](#)
- [40 USC Subtitle V. Regional Economic and Infrastructure Development](#)
- National Environmental Protection Act (NEPA) - <https://www.nbrc.gov/content/NEPA>
- Build America Buy America Act (BABAA) - <https://www.nbrc.gov/content/BABAA>

Forms & Guidance

- NBRC website

Human Support

- Your [Local Development District](#)
- NBRC Staff – GMS grant record starting with “GT” and email **admin@nbrc.gov**.