



## Grantee Guidance:

### Giving LDDs Access to Grantee Records/Sending LDD Request

By initiating any type or request for the first time with your LDD partner, **this is the mechanism that gives the LDD access** to some of your records and information.

Without this request, they cannot see any information about your grant.

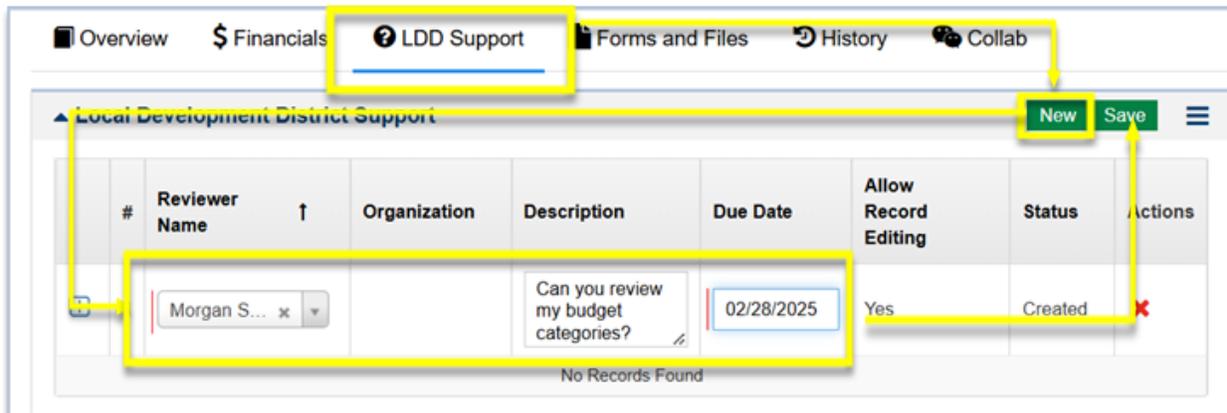
When working with an LDD, **you must initiate these requests in the system** on a regular cadence. The LDD will be able to edit, but **you must also log in and finalize** submission of the following items:

- **Progress Reporting** – Once your grant agreement has been fully executed, you should navigate to the available progress report records and initiate the review (these records are in a draft state, and this will allow the LDD to make edits far in advance of their being due)
  - **At the beginning of each quarter**, new draft reporting will be generated by the system – you should log in and initiate review for any available progress report records
- **Reimbursements** – as soon as your grant agreement has been fully executed, you should create your first draft reimbursement request and initiate LDD review (this will allow the LDD to be proactive in assisting with that first request)
  - **For any subsequent payment requests**, create the draft request early and initiate the review
- **Amendments** – Once your award is active, if changes are needed, create the draft amendment request and initiate the review early so the LDD can provide support

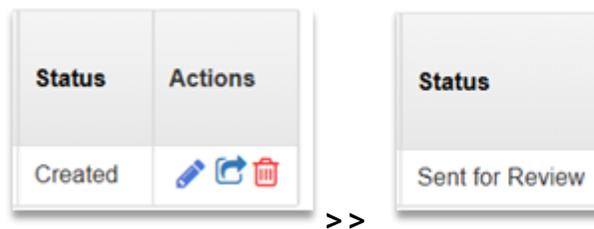
### Step by Step Instructions for Requesting LDD Review

1. Log into your GMS account
2. Navigate to your Award Record
  1. For Reporting: Navigate to the Performance tab. Draft reports will appear in the Progress Reports section
  2. For Reimbursements: Navigate to the Actuals tab. On the Payment Requests section, click the “Payment Request” button.

3. For Amendments: Navigate to the Management tab. Scroll to the Amendments section and click the "New" button.
3. To create the request:
    - a. Navigate to the LDD Support tab of the draft Progress Report/Reimbursement/Amendment record and click New
    - b. Enter the name of your LDD contact, a description, and due date
    - c. Click Save



2. Send the request (*THIS STEP IS CRUCIAL! Even though you've created the request, you must then SEND it to the LDD.*)
  - a. When the page refreshes, be sure to click the arrow icon (🔄). The Status will change from "Created" to "Sent for Review"



3. Complete the Review
  - a. You and the LDD can work on the record simultaneously, but you will need to click the Complete Review in order to finalize the request. Note that the LDD will be unable to make edits to the request once the review has been completed.

Reimbursement Payment Request  
**GT-CAT13-00001 January 2025**

[Edit](#) [Complete Review](#) 

EGMS ID	Status	Award	Budget Period
PR-CAT13-00	Submitted for LDD Review	<a href="#">AD-CAT13-01</a>	12/5/2024 - 5/5/2026

4. Submit the record
  - a. The LDD cannot submit the record for you; a user on your organization account with the "Primary" designation must log in, navigate to the record, and finalize the submission.