



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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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.

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.



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	

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 ①
Passed

*Comments ①
Reviewed and content looks good, ready to submit

Review Type ①
Program

Save

Application Review

Edit Submit Review

Details

Rating ①
Passed

Comments ①
Reviewed and content looks good, ready to submit

Review Type ①
Program

Reviewed by
Morgan SME

Review Date
01/15/2025 1:36 PM

Edit Submit Review

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	Submitted



- 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

Completed Tasks

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

Tasks	Completed Tasks (Assigned To Me) ⓘ
My Tasks	Search...
Pending Tasks	Showing 1 to 10 of 45 records
Completed Tasks	Page 1 of 5
Activities	
Pre-Applications	
Submitted Pre-Applications	
LDD Reviews	
Pre-Application Reviews	
Application Reviews	
Amendment Requests	

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.

- 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

Application

Award Creation SP

EGMS ID

Status

Application Due Date

Download As PDF

Amendment Requests, Progress Reports, Reimbursements

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

Pre-Applications

Submitted Pre-Applications

LDD Reviews

Pre-Application Reviews

Application Reviews

Amendment Requests

Progress Reports

Reimbursements

Reimbursements

Search...

* Records are sorted by Last Modified Date ascending order

Showing 1 to 5 of 5 records

EGMS ID	Award Id	Payment Request Amount	Payment Period	Status	Actions
PR-Test-01	AD-Test-03	\$800.00	8/1/2024–2/15/2025	Paid	
PR-Test-00	AD-Test-03	\$5,000.00	8/1/2024–2/15/2025	LDD Reviewed	
PR-FDTHA-05	AD-FDTHA-08	\$50,000.00	9/1/2024–10/31/2029	Approved	
PR-FDTHA-06	AD-FDTHA-13	\$140,000.00	9/1/2024–10/31/2028	Paid	
PR-CAT13-00	AD-CAT13-01	\$500.00	1/1/2025–1/31/2025	Paid	

Total Records:5

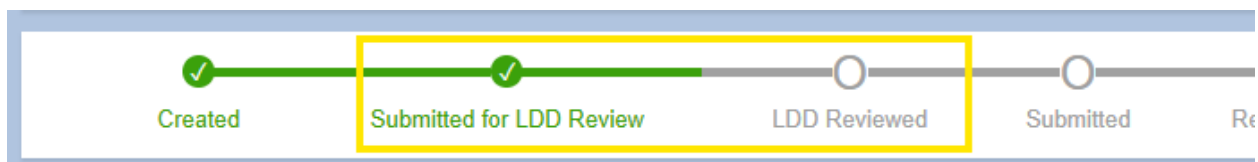


1. Under each of these menu options, you will see a list of records that you were asked to review. *You will also receive an email notifying you that a review has been requested, with the subject line “Notification: You are requested to Review the _____ Request.”*
2. For each, you have access to a hyperlinked Award Record, Status information, and a green eye under Actions where you can access the record. You can find additional information relevant to that record type in these menus:
 - a. Reimbursements
 - i. Payment request amount
 - ii. Payment period
 - b. Amendment Requests
 - i. Amendment Type
 - ii. who initiated the amendment
 - c. Progress Reports
 - i. Reporting frequency
 - ii. System due date
 - iii. report type

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
GTG-05-000-001-100-00-00	05-000	00	GTG-05-000-001-100-00-00	07/25/2025 11:11 AM	



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 Edit

Status: Active EIN: 333333333 UEI: JXZKY64AYNF1

Overview Related Log Risk Assessment Files Collab

Description 1

Address Line 1 5450 PIONEER 13TH ST	Address Line 2	City CLEWISTON
State	Congressional District 018	Zip Code 33440
Country USA	County	Organization Type Business or Organization
Website https://nbrgrants-uat.sandbox.my.site.com/	UEI JXZKY64AYNF1	SAM Gov Expiration Date 06/08/2024
Cage Code	Phone (898) 908-9990	Vendor Id RG-000163
Organization DBA		

Additional Information 2

Authorized Official Zen trope	Fiscal Year Start Date 01/01	Fiscal Year End Date 12/30
Last Audit Year		

Additional Addresses

Contacts 3

Showing 1 to 3 of 3 records New

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

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

Submitted 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



GMS Records Overview

