

## Northern Border Regional Commission

# LDD Support Tab - LDD Review Guidance

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### For Applicants:

**Note:** Forest Economy Program and Timber for Transit applicants are not required to utilize an LDD unless otherwise specified by NBRC at time of pre-application.

#### Associate your LDD to the record

(Also listed as steps 15-16 in the Application submission guide)

1. Find your Application, on the Overview tab, scroll down to Contacts, click Associate button, update Project Role to LDD Contact

Contacts					Associate S
add a new co-applicant, please click the itton and select the co-applicant.		contact details. If you are associating a co-appli LDD contact.	cant, you have previously added wit	hin an application in Gov(	Grants, click the Ass
Project Role	Name †	Email	Is Key Contact	Is User	Actions
Project Director/Manager	Casey Haynes	caseytestorg@yopmail.com	✓	~	۷ 🏈 🌑
LDD Contact	Casey Haynes caseytestsme@yopmail.com			×	C
None Authorized Signatory Co-Applicant Ebiz POC		Total Records:2			
Fiscal Contact Grants Administrator Principal Investigator Program Manager Project Director/Manager	Acknowledgement	Submitted By		Submitted On	
Other Vermont State Contact New York State Contact Maine State Contact New Hampshire State Contact Program Director	Created Date 04/08/2024 11:59 AM	Last Modified By Casey Haynes		Last Modified Date 04/16/2024 1:20 PN	И

#### **Request LDD review**

(Also listed as steps 7-12 in the Application submission guide)

				* Rec	quired to Save	A Required	l to Submit
Overview	Locations	\$ Budget	C LDD Support	Forms and Files	C History	+	
▲ Local Develo	oment District S	upport				New	≡

- 1. If you would like LDD assistance in reviewing your application, click the LDD Support tab and navigate to the Local Development District Support section.
- 2. Click the **New** button to add a row to the table.
- 3. Under the **Reviewer** name column, enter your LDD's name (the system will filter the list for the available LDDs).
- 4. Enter the Description and Due Date for the support.
- 5. Once complete click the section **Save** button.

Ov	ervie	ew <b>Q</b> Locations	\$ Budget	🖀 Proposal	C LDD Support	Forms and Files	History	+
▲ Loo	cal D	evelopment District S	Support					New
	#	Reviewer Name †	Organization	Description	Due Date	Allow Record Editing	Status	Actions
Ð	1	Stacey Austin	NBRC	test	04/16/2024	Yes	Created	e 🖉 🕅

ONE MORE STEP TO SEND: click the send for review icon (boxed in red above). This
icon will update to a re-send for review icon if you have received feedback and would
like to send for a 2<sup>nd</sup> round of LDD edits.

**Important Notes:** LDDs cannot view, provide feedback, or edit your application in the system unless you submit an initial request for review.

You can continue to work on the application while the LDD is accessing the application. If you are ready to submit and the LDD has not completed their task you can override their LDD task by clicking the Complete Review button.

You can re-send for review to allow the LDD to make additional edits, but LDDs cannot make edits for you after you click the Complete Review button.

J TESTING ALL_CLH			Edit	Complete Review	=
32	Status Submitted for LDD Review	Application Due Date 05/31/2024 4:04 PM			

## For LDDs:

#### Review as a pending task

The review will show up as a pending task (boxed in red), but you can also view all of your reviews (whether open or Completed) from the lefthand navigation bar (boxed in blue).

A Pending Tasks (Assigned     My Tasks     Pending Tasks (Assigned     Search     Sharch     Sharch     Sharch	To Me)						-
My Tasks - Perform Tasks (Assigned Averding Roks Completed Tasks Showing 1 to 1 of 1 records							-
My Tasks - Prinding Data Completed Tasks Shawing 1 to 1 of 1 records							
Completed Tasks Shaving 1 to 1 of 1 records	Q						-
Completed ratio							<b>T</b>
Activities - EGMS ID Ta	ik Type	Subject	Created By	Due Date	Status	Actions	
LDD Reviews _ AP-NBRC-032 Re	view Recipient Appli	Review Recipient Appli	Casey Haynes	04/18/2024	Not Started	•	
Pre-Application Reviews			Tatal Records: 1				
Application Reviews				_		_	
Amendment Requests Pending Tasks (Assigned	By Me) 🛞						
Progress Reports Search	Q 0						T
Recent Items -	_						
Technical Support - EGMS ID Task Type	Subject			Assign	ed To	Due Date	Status
Contact Us			No records found				

#### Guidance for LDD on how to utilize the review phase

Once the grantee hits the "Send for Review" button, the review can begin. If you will be editing the application, you can make your edits directly in the application itself. If you want to just provide feedback, you can provide that under LDD Support tab when you send the review back to the applicant. Either way, you'll need to complete the following steps.

									Required to Save	🛕 Required to Su
Ove	erview	Cocations	\$ Budget	Proposal	C LDD Support	Forms ar	nd Files	3 History	Collab	
Loc	cal De	velopment District Su	upport							=
#1	#	Reviewer Name †	Organizat	ion	Description	Due Date	Allow R	ecord Editing	Status	Actions
Ξ	1	Casey Haynes	casey test	SME account	please review	04/18/2024	Yes		Sent for Review	<b>Ø</b> #2
	A R	eviews								=
	Show	ving 0 to 0 of 0 records								
		Comments Last Mudified Date †								

- 1. Expand the section located next to your name.
- 2. Click yellow edit button

	Save
	* Required to Save 🛕 Required to Submit
Details	
*Rating (1)	*Comments (i)
None	V Comments (g)
-None-	
Passed Failed	1.
Cannot Rate	
Program	

- 3. In the review box that pops up, choose "Passed" and fill in your feedback/comments in the Comment box. TIP: Use this box to make note of where you made changes to the application or sections the applicant still needs to work on/improve.
- 4. Hit Save, and then Submit Review.
- 5. If the applicant would like you to do another review, they will need to repeat step #6 in the For Applicants > Request LDD Review section above.
- \*\*Once the applicant clicks the Complete Review button, no more LDD edits can take place, as the status of the application has changed.\*\*

#### How to use the Collab Tab

During review is also the point at which using the **Collab tab** can start being helpful. *TIP: Information and comment exchange can happen more quickly through this means.* The applicant and LDD can chat back and forth through that tab *without having to officially send the review back and forth.* 

The LDD can see the record anytime once they've been requested to review and even after the review is Complete, but the LDD can only make direct edits to the application when they've been requested to review the application in the system and that review request is "open". To communicate with the applicant, you can use the email function at the bottom of the Collab tab or utilize the **My Feed** section:

🛚 Overview 🥌	Locations	\$ Budget	Proposal	C LDD Support	S Forms and Files	3 History	Collab
My Feed							
earch		Q			0		
What are yo	u working on? @ment	tion someone					
To this record	0				Share		
Sort By: Rece	nt Activity						
Stacey Austin (Partner) @Casey Haynes Heyo @Casey Haynes how can I help today??							
Comment - Like - 14m ago Casey Haynes (Partner) @Stacey Austin @Stacey Austin Helloooo can u hear me??							
Commen	t · Like · 16m ago						
	Haynes (Partner) an SME @Morgan SM	ME collab tab tes	t #2 (LDD associate	ed as contact on record)			

1. Use @ followed by the applicant's name, then type your message. Hit "Share" when you want to send.

Additionally, once the review is initiated you can also see any @ mentions that come in through the collab module up at the top (boxed in red).

Northern Border Regional Commission	Enterprise Grants Management System
<	* 🗩
0	My Feed
Stacey Austin	Search Q
stacey.austin@yopmail.com	Post Link
My Feeds	What are you working on? @mention someone
What I Follow	
То Ме	To My Followers
My Colleagues 8	Sort By: Recent Activity
My Groups 0	AP-NBRC-041 — Casey Haynes (Partner) @Stacey Austin @Stacey Austin Helloooo can u hear me??
My Content 0	