Northern Border Regional Commission

Your GMS Account and Contacts

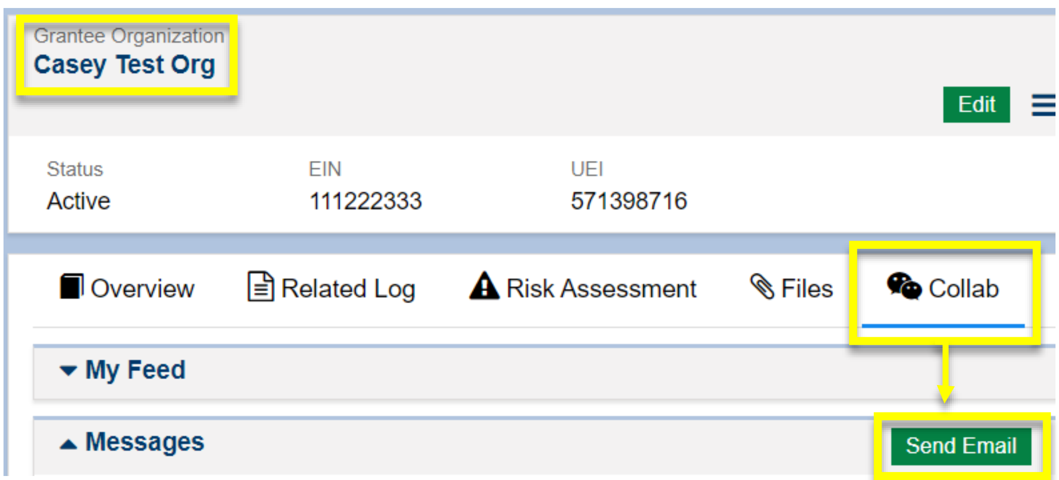
Use the following guidance to set up and make edits to the points of contact for your organization, assign system user permissions, and more.

Contents

Organization Profile

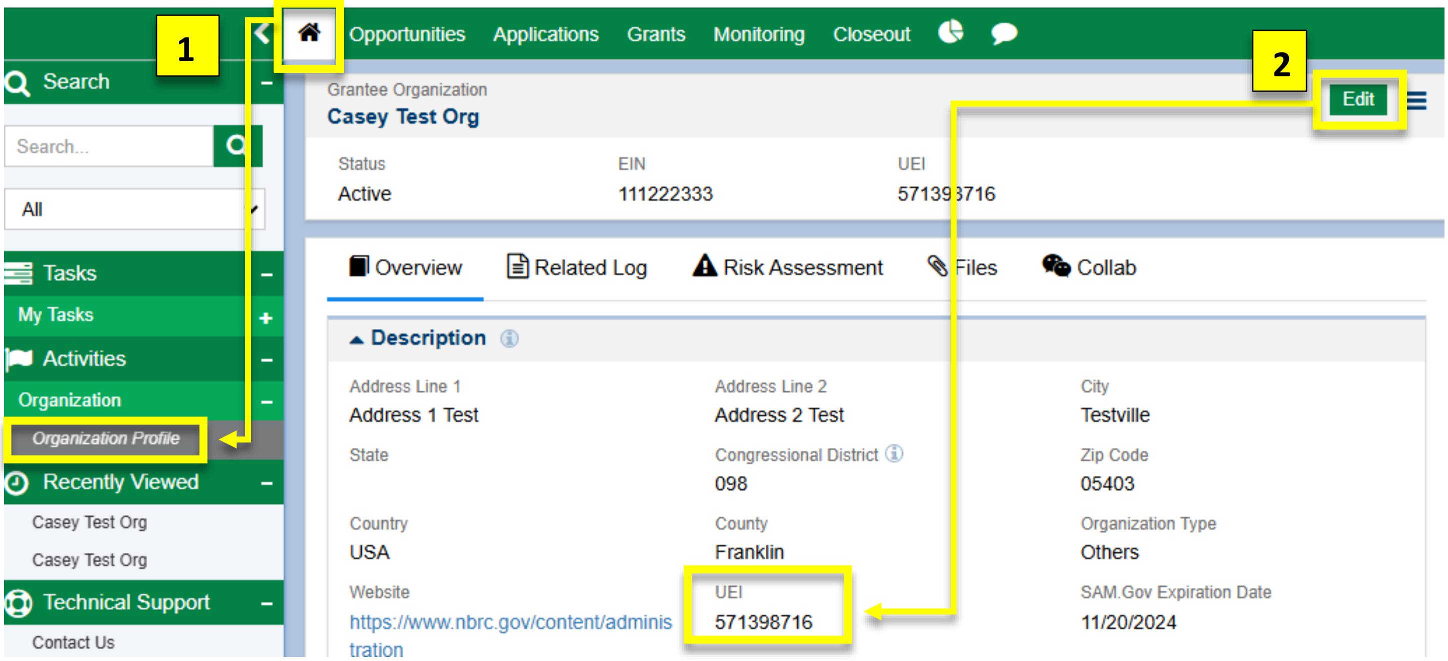
If the top of your page says "Grantee Organization" you are viewing your organization profile and the following sections are applicable.

For additional assistance with your **Organization Profile**, click the Collab tab, click Send Message, and direct your request to admin@nbrc.gov



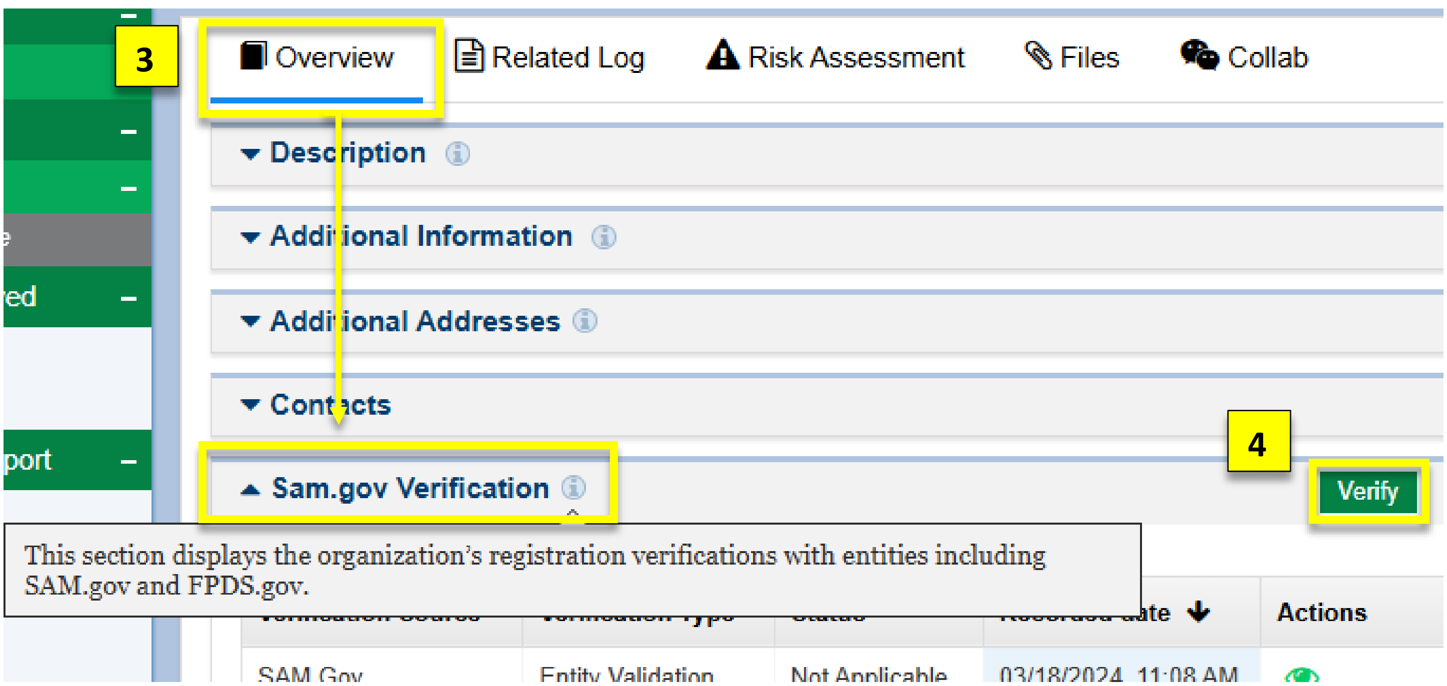
Updating Your Organization's UEI

1. Go to the Home page, then click Organization Profile in the lefthand navigation bar
2. Click the Edit button to update the UEI field. Be sure to click the Save button when done.



Connecting/Refreshing your account's connection to SAM.gov

3. Staying in the Overview tab, scroll down to the Sam.gov Verification section
4. Click the Verify button



<u>Note:</u> The page may refresh or redirect you to another tab, but if you go back to the Overview tab, you should see your information in the Description section showing as updated.

If you have tried the steps above and are not seeing your account information as being found or updated, you may need to go directly to SAM.gov and make sure the SAM Search Authorization is checked:

Executive Compensation

Registrants in the System for Award Management (SAM) respond to the Executive Compensation questions in accordance with Section 6202 of P.L. 110-252, amending the Federal Funding Accountability and Transparency Act (P.L. 109-282). This information is not displayed in SAM. It is sent to USAspending.gov for display in association with an eligible award. Maintaining an active registration in SAM demonstrates the registrant responded to the questions.

In your business or organization's preceding completed fiscal year, did your business or organization (the legal entity to which this specific SAM record, represented by a Unique Entity ID, belongs) receive both of the following: 1. 80 percent or more of your annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements and 2. $25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements?
No

Does the public have access to information about the compensation of the senior executives in your business or organization (the legal entity to which this specific SAM record, represented by a Unique Entity ID, belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986?
Not Selected

SAM SEARCH AUTHORIZATION

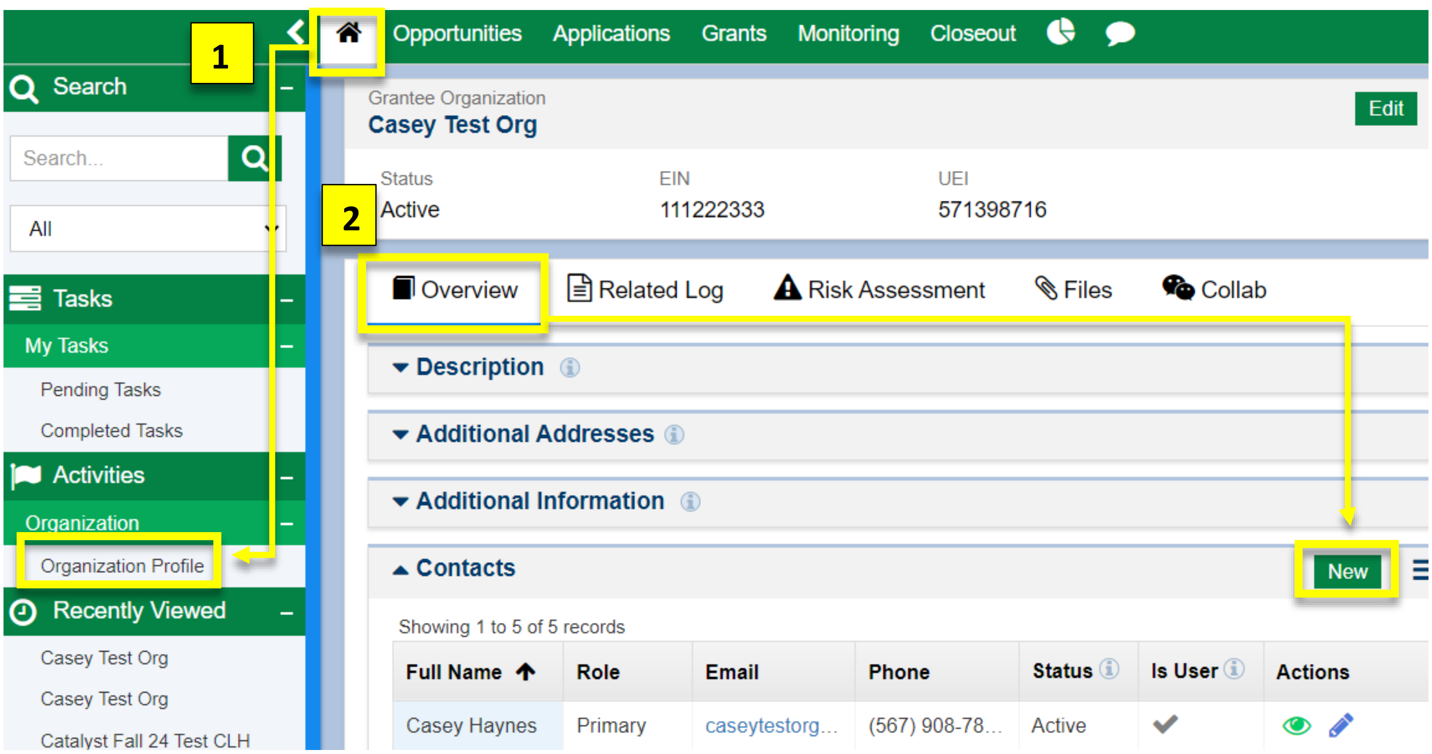
I authorize my entity's non-sensitive information to be displayed in SAM public search results:

Yes

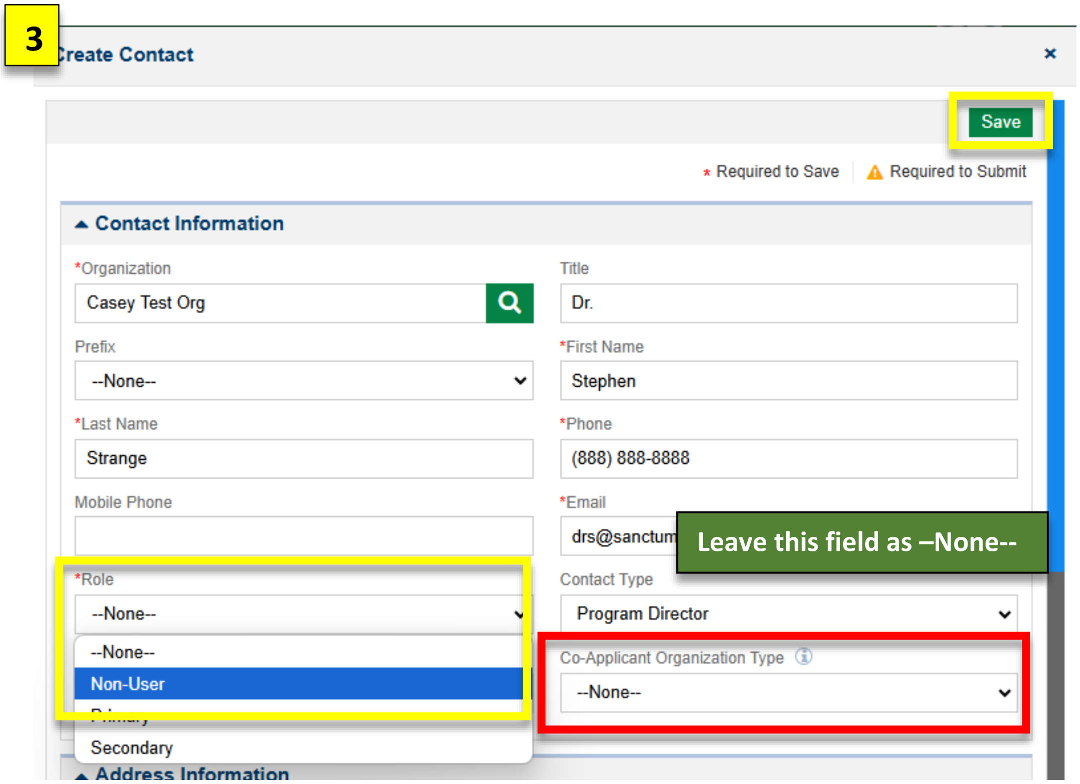
Adding Contacts

You can list as many contacts as desired on your organization's account, but **only two people can be given GMS access at a time**.

1. Make sure you are on the Home page, then click Organization Profile in the lefthand navigation bar
2. Making sure you are on the Overview tab, scroll down to the Contacts section and click the New button:



3. In the Create Contact window, fill out the relevant information and make sure to set the Role for this new contact as a Non-User and click Save



NOTE: If you are working with a LDD, do not list them as a contact here. Scroll to the Project Contacts section to see how to associate an LDD partner with your project.

Assigning or Updating GMS Users

Notice the “Primary” and “Secondary” options under Role in the step above.

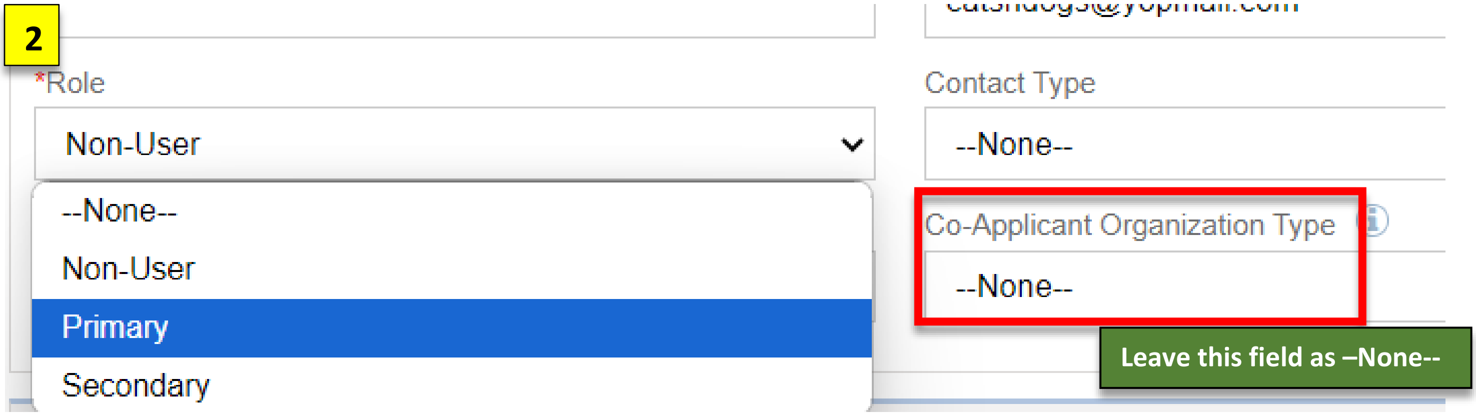
- Secondary: can log into the GMS and view account information, can make edits to open application and grant administration tasks.
- Primary: able to see and click the Submit and similar buttons in order to finalize those activities. Can have both contacts set up as Primary if desired.

You can only have two Primary/Secondary contacts, so once you’ve decided which two users should be able to access the GMS and conduct activity on behalf of your organization

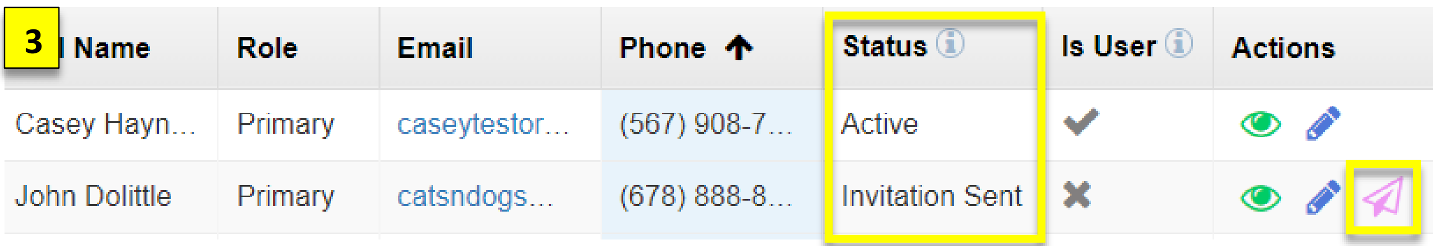
1. Click the blue pencil icon under the Actions column to edit the contact information:

1 ll Name	Role	Email	Phone	Status	Is User	Actions
Casey Haynes	Primary	caseytestorg@y…	(567) 908-7865	Active	✔	
John Dolittle	Non-User	catsndogs@yop…	(678) 888-8888	New	✖	

2. Update the Role and click Save. NOTE: Leave Co-Applicant Type as “—None—” otherwise you will not be able to complete the following step



3. There will now be a paper airplane icon ( ) under the Actions column. Click that icon to send an email that will prompt them to create their user account. They have 72 hours to accept the invitation or it will expire, and you will need to re-send the invitation. The Status column will show "Invitation Expired" if too much time has elapsed. Status will change to "Active" once they have accepted the invitation and finalized their account.



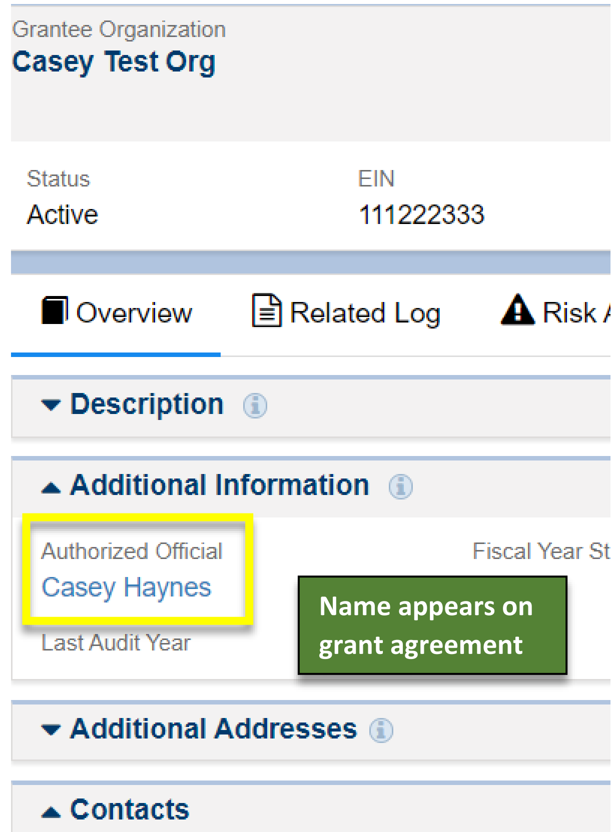
Name	Role	Email	Phone	Status	Is User	Actions
Casey Hayn…	Primary	caseytestor…	(567) 908-7…	Active		
John Dolittle	Primary	catsndogs…	(678) 888-8…	Invitation Sent		

NOTE: If you already have two Primary/Secondary users showing as Active but need to give a different contact access to the GMS, first make sure the contact is created as a Non-User and then the Authorized Official should contact NBRC with:

- Name and desired Role (Primary vs Secondary) for your existing Non-User contact
- Name of existing contact to be deactivated and changed to Non-User. Their contact information will remain on your organization profile but will not have access to the GMS.

NBRC will make changes on the backend and then send the invitation on your behalf for the new user to finalize their user access.

Updating Your Authorized Official



By default, the individual who creates the organization account in the GMS becomes listed as the organization's Authorized Official (AO). You can view the current AO under the Additional Information section of your Organization Profile. This individual is the name that will appear on and sign grant agreements.

Any Active user given Primary access (See Assigning or Updating GMS Users) can be listed as the project's AO.

<u>To update your organization's AO to an existing Primary contact:</u>

1. The current AO should contact NBRC with the name of the existing contact to be made AO
    a. NBRC will confirm once the change has been made

<u>If the new AO is not yet a user of the GMS:</u>

1. Follow the steps in Adding Contacts to add the new AO as a Non-User
2. The current AO or representative of the organization's governing body should contact NBRC naming the new AO
    a. NBRC will make changes on the backend and then send the invitation on your behalf for the new user to finalize their user access
3. Once the new AO has finalized their account and has successfully logged in, **they must contact NBRC to finalize the change of AO on the organization profile**
    a. NBRC will confirm once the change has been made

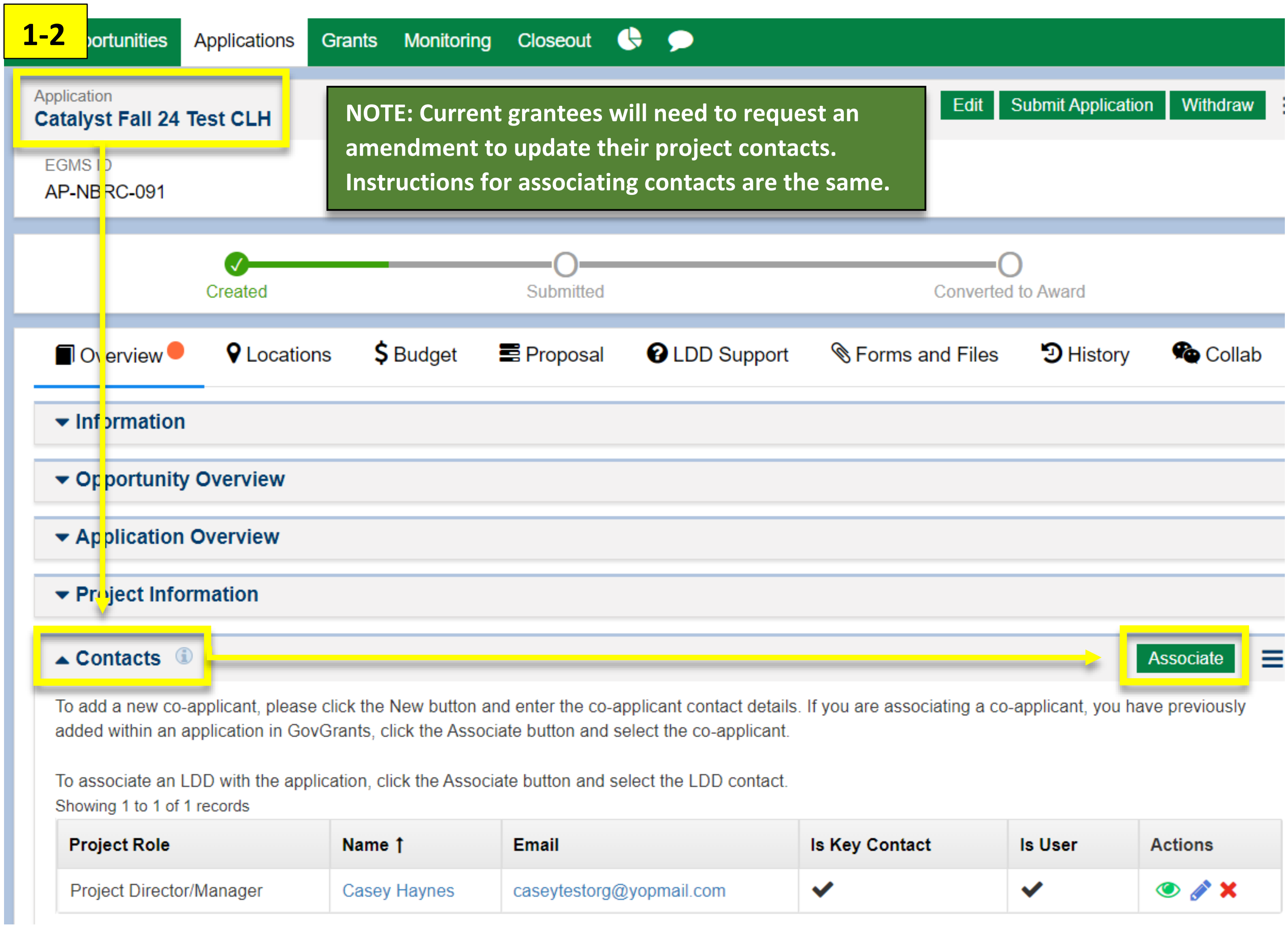
Project Contacts

Project contacts are existing contacts in the GMS that you can associate with your project. Associating a project contact does not give that contact access to your project record—NBRC will conduct project-related outreach to anyone listed as a contact on your project.

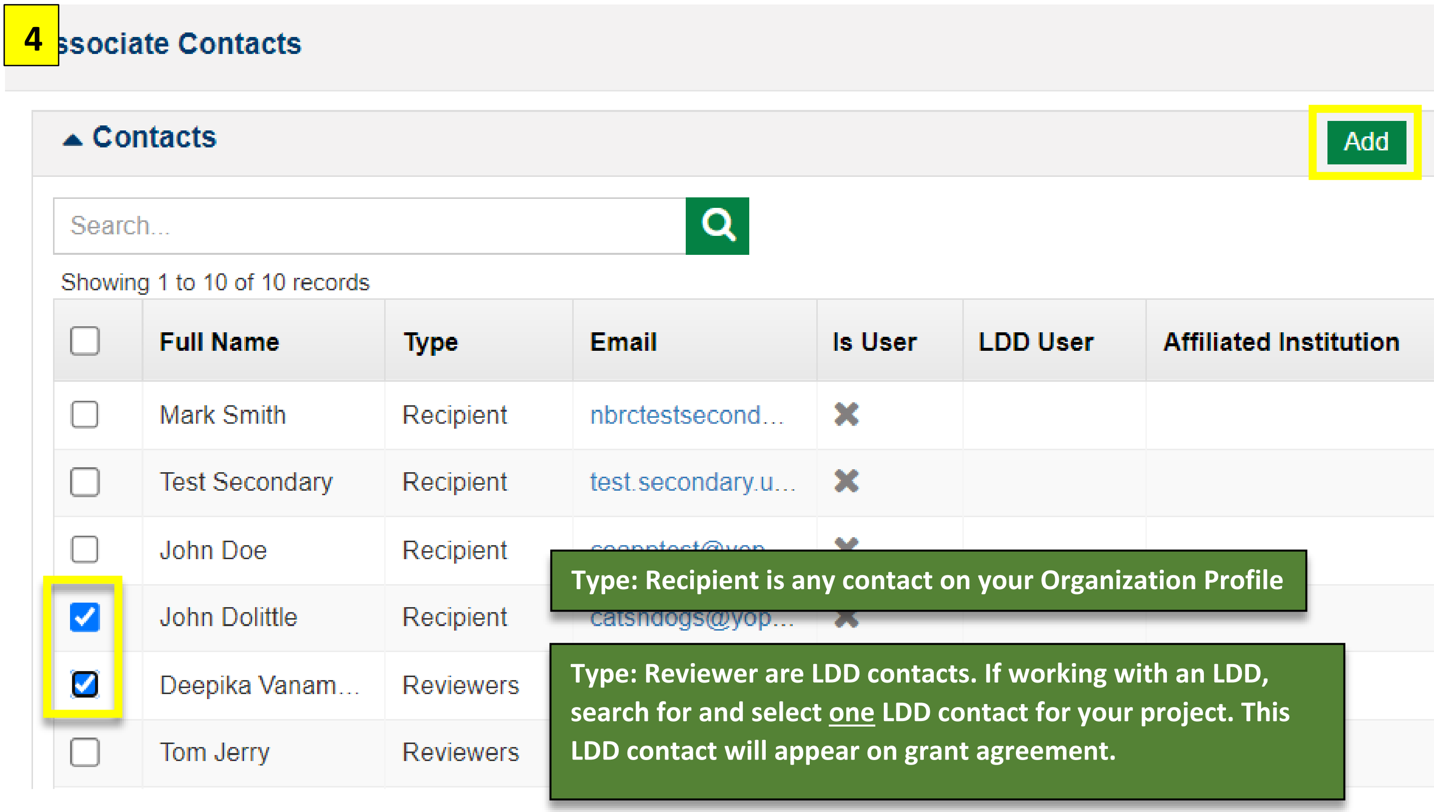
Associating Project and LDD Contacts

Whoever creates the application record will be that record's owner and set up as a project contact by default. You can view your project's current contact list by

1. Navigating to your application/award record and scroll down to the Contacts section
2. On the Contacts section, click Associate button
    a. NOTE: Current grantees will need to request an amendment to update their project contacts. Instructions for associating contacts during an amendment are the same as described below.



3. In the Associate Contacts window, check the boxes for each contact you would like to associate to the project record, and click Add.
    a. If working with a Local Development District (LDD), you can use the search bar to look up and add that contact to your project record. **Associate only one LDD contact with your record**—that contact will appear on your grant agreement.
    b. **Associating <u>does not</u> give a LDD contact access to your project details**—see NBRC's Creating and Submitting an Application (or GMS Grantee toolkit for current grantees) for guidance on requesting LDD reviews and giving edit access.



4. When the page refreshes, you can click the blue pencil icon() to edit the Project Role for each contact and click Save.
    a. Be sure to set your LDD contact's role to "LDD Contact" if applicable