



# 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 section 1: “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 | <b>Edit</b> |

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  ⓘ

Passed

Review Type  ⓘ

Program

**Save**

Application Review

**Edit** **Submit Review**

**Details**

Rating  ⓘ

Passed

Review Type  ⓘ

Program

Review Date

01/15/2025 1:36 PM

Comments  ⓘ

Reviewed and content looks good, ready to submit

Reviewed by

Morgan SME

**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                  | <b>Submitted</b> |



- 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.

| Completed Tasks (Assigned To Me) ⓘ   |                             |   |                      |           |         |  |
|--|-----------------------------|---|----------------------|-----------|---------|--|
| Search...  |                             |   |                      |           |         |  |
| Showing 1 to 10 of 45 records <span style="float: right;">Page 1 of 5</span> |                             |   |                      |           |         |  |
| 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.

**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 | <span style="color: green;">+</span> <span style="color: red;">x</span> |

**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 a LDD review was not requested within the GMS during the application phase, the LDD will not be able to see application record 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 a grantee can get you information from the application record:

- Application files – Grantee can re-upload any application files into their current award record
- Application Project Narrative – the grantee 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

5



1. Under each of these menu options, you will see a list of records that you were asked to review
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:
  - 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

## 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

**1** **Description**

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

**2** **Additional Information**

|                                  |                                 |                               |
|----------------------------------|---------------------------------|-------------------------------|
| Authorized Official<br>Zen trope | Fiscal Year Start Date<br>01/01 | Fiscal Year End Date<br>12/30 |
| Last Audit Year                  |                                 |                               |

**3** **Additional Addresses**

**Contacts** New

Showing 1 to 3 of 3 records



## 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:

| EGMS ID        | Status | Active Award |
|----------------|--------|--------------|
| GT-510TE-00003 | Active | AD-510TE-03  |

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

Expandable Sections:  
▼ Grant Information  
▼ Grantee Information  
▼ Grant Description  
▼ Period of Performance  
▼ Budget Period Details ⓘ

Get here from:

- Award Record



## Award Record

Example:

**Award**  
**5/10 test sp**

|                        |                     |                            |  |
|------------------------|---------------------|----------------------------|--|
| EGMS ID<br>AD-510TE-03 | Status<br>Activated | Grant ID<br>GT-510TE-00003 | Budget Period<br>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

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

