Northern Border Regional Commission

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).

Contents

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.

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

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

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.

3

8. 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.

1. By clicking the green eye, you can view the record that you reviewed.

Application Reviews

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.

1. 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 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   ≡
                                                        🗎 Download As PDF
EGMS ID   Status   Application Due Date

Amendment Requests, Progress Reports, Reimbursements:

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

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

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.

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:

Get here from:

- Award Record

Award Record

Example:

Get here from:

- Grant record
- Any of the Amendment Request, Progress Reports, or Reimbursements list views or via any of those individual records

GMS Records Overview

1 → **2** → **3** → **4**

ORG REGISTRATION	PRE-APPLICATION (E.G. PR-NBRC-010)	APPLICATION (E.G. AP-NBRC-039)	GRANT (E.G. GT-CAT-00013)

ORG REGISTRATION
- AO (defaults to account creator)
- Secondary user can be set up by AO
- Additional non-GMS user contacts can be added here too

PRE-APPLICATION (E.G. PR-NBRC-010)
- Budget table **>**
- Project Contacts **>**
- Project Info **>**
- Funding sources **>**
- Establish match % **>**

Files
- Any applicable waivers

APPLICATION (E.G. AP-NBRC-039)
- Budget table **>**
- Project Contacts **>**
- Project Narrative Info
- Funding Sources
- Project Narrative
- Technical Proposal

Files
- SF-424cbw, Authorized Official Resolution, NEPA intake, project maps, etc.

GRANT (E.G. GT-CAT-00013)
- Basic details like org name, total award, required match, etc.

Files
- NEPA review documentation
- Documentation of secured match
- Executed LDD contract

AWARD (E.G. AD-NBRC-054)
- Budget table
- Award Description
- Project Contacts
- Executed grant agreement

AWARD (E.G. AD-NBRC-055) *[revision]*

AWARD (E.G. AD-NBRC-056) *[revision]*

">" Indicates a section of information that carries forward in the system/can be viewed in the next phase's record