



## LDD Guidance: Viewing & Editing Records in the NBRC's Grants Management System

We appreciate that you are learning the GMS alongside us here at NBRC as we build this robust resource for our applicants and grantees. We understand there is a lot of complexity, which is great, but also can be confusing. Outlined below are the different stages of “records” in the GMS and what kind of access LDDs have to those records.

**NOTE:** Do not have an applicant/grantee add your GMS account/email address to their list of organizational contacts on their organization record. Applicants/grantees should only associate your GMS account/email address as the LDD contact on the “Overview Tab” during the Pre-Application or Application phase.

### **Pre-Application Record** (EGMS ID starts with “PR-” (e.g. PR-NBRC-010))

- Information from pre-application carries forward to application record
- No official LDD access/viewing/reviewing
- Currently, LDD can view full record by taking one of the steps below

### **Application Record** (EGMS ID starts with “AP-” (e.g. AP-NBRC-028))

- Information from application carries forward into grants and awards records
- Grantee can request a LDD review their application
- LDD can view and make edits to full record once request is made by grantee

### **Grant/Award Record** (EGMS ID starts with “GT-” (e.g. GT-CAT-00013))

- EGMS ID is replacing the format of NBRC's previous project numbers (e.g. NBRC20GVT04) that appear on grant agreements, and which should be used in all correspondence
- LDD has access to specific activities, such as reimbursements and reporting, to view and edit during the award phase on the grant record once request is made by grantee
- Currently, LDD can view full record by taking one of the steps below

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### **Current options for the LDDs to view a full Record**

- Sharing login info: If both parties are comfortable, applicant/grantee can share their login information with LDD to use to see full record
- Screen sharing: Schedule a virtual meeting and have applicant/grantee share their screen while in the GMS
- Download PDF: Applicant/grantee can download entire record as a PDF by clicking hamburger icon( ☰ )