Northern Border
Regional Commission

GovGrants Toolkit

Navigating NBRC's Online Grants Management System

As NBRC continues its transition to a comprehensive grants management system, we will update this supplemental document to assist with navigating and completing standard grant activities. Use the table of contents below or type CTRL + F to search for relevant keywords. It is highly recommended that you review and understand Section 1 "Basic Navigation" and reference later sections as-needed.

For programmatic and compliance requirements, see NBRC's Compliance Manual.

If you have questions or feedback, you can respond directly in the system (See "Using the Collab Tab") or email us at admin@nbrc.gov.

Contents

Updated 10/10/2025

1. Basic Navigation

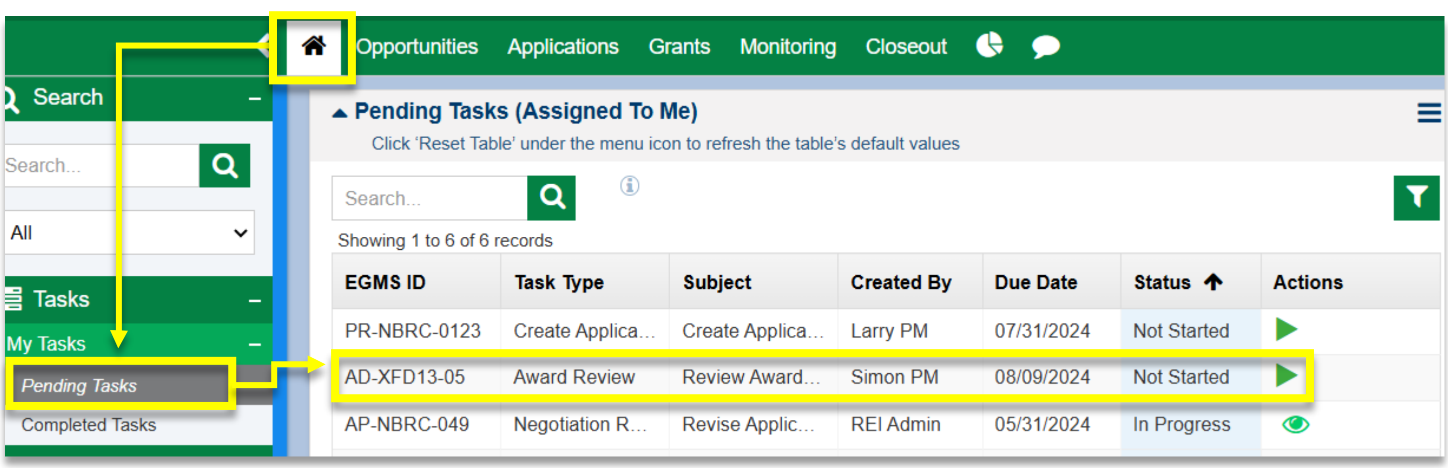
Understanding the following components of the GMS will assist with completion of activities across your grant's period of performance.

1.1 Locating Pending Tasks

The system generates tasks for most activities that require follow-up. Clicking the task link will take you directly to the page related to that activity. Completing the associated activity will also complete the task and remove it from your pending task list.

To view all of your pending tasks:

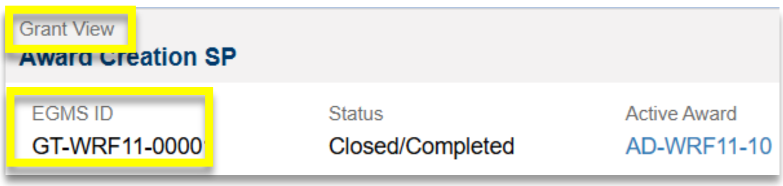
1. Go to the Home page
2. On the left sidebar under Tasks > My Tasks, click Pending Tasks
3. Referring to the Task Type column, find the row that contains the relevant activity
4. Click either the Start icon (▶) or a View icon (👁) that you see under Actions



1.2 Locating Records

NBRC's GMS is built on Salesforce and uses many different types of interconnected "Records" or containers for information related to various grant activities. In the screenshot above, you are seeing a list of records, each identifiable by a unique "EGMS ID".

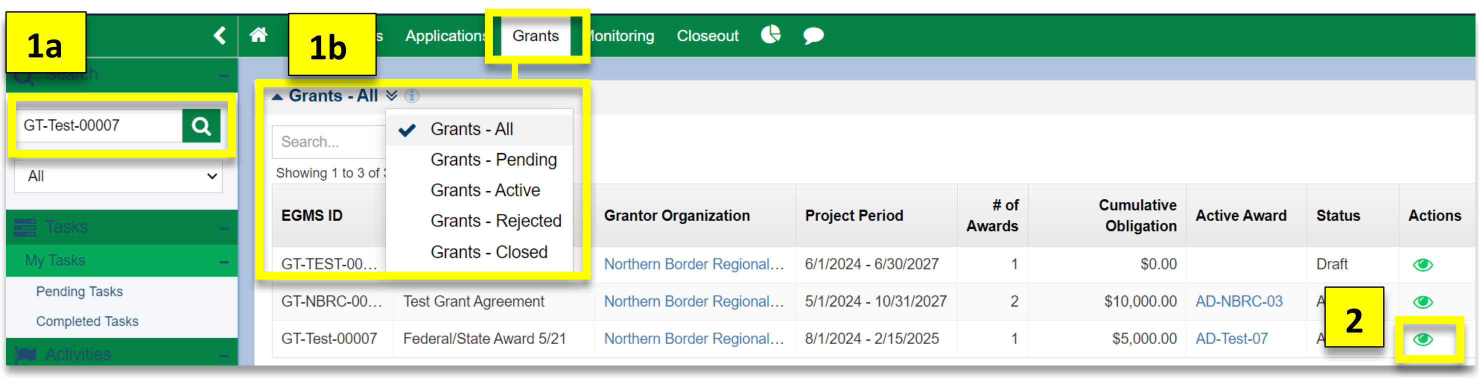
You can always tell what type of record you're looking at by what shows up at the top of the page:



Grant and Awards

<u>Grant Record</u> (**GT-**XXXXX-#####) – This is the record of your project across its entire period of performance and is the number you will reference in any project-related correspondence.

1. To locate your grant record
   a. Type your grant number into the Search bar in the top-left of the screen OR
   b. Go to the "Grants" page, select "Grants – All"
2. Click View icon ( ) under "Actions" column



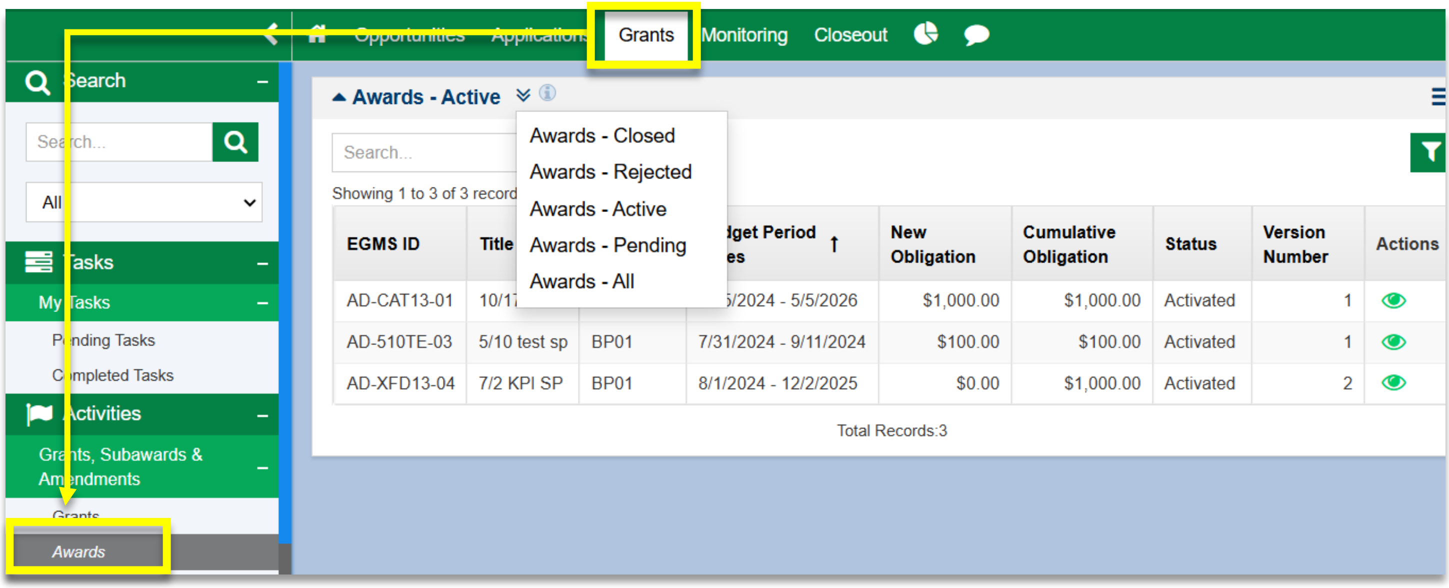
<u>Award Record</u> (**AD-**XXXXX-#####) – This is the record for a specific version of your project. Each award will exist under the umbrella of your Grant ID. For example:

GT-1234C-00001:

- AD-1234C-03: Second revision of a project that extended the period of performance
- AD-1234C-02: First revision of a project that included updated budget details
- AD-1234C-01: Original version of project

The most current version of your project is the "Active Award". Links to the Active Award will appear in many places alongside the grant record, as shown in both screenshots above.

1. To locate your award record(s)
   a. Go to the Grants page and click "Awards" on the left sidebar.
   b. You can select "Awards – All" to view a list of all of your award records



Application

While you can find much of your project's information in the [Active Award](#) record, you may also want to refer to original narrative about your project or documents submitted as part of your original application.

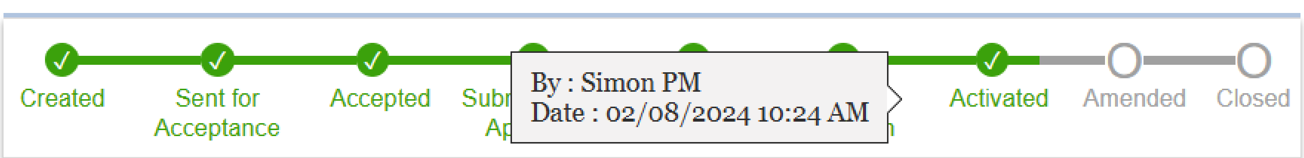
You can go to the Applications page and select "Applications – All" to view your full list of application records. Refer to NBRC's application submission guidance for more detailed information about that module.

Organization Account

From the Home page, on the left sidebar, you can click "Organization Profile" to view your organization's account information. Refer to NBRC's account and contact management guidance for more information.

1.3 Checking the Status of an Activity

You can view the current status as well as which user completed various actions on an activity by hovering over the status bar of a record:

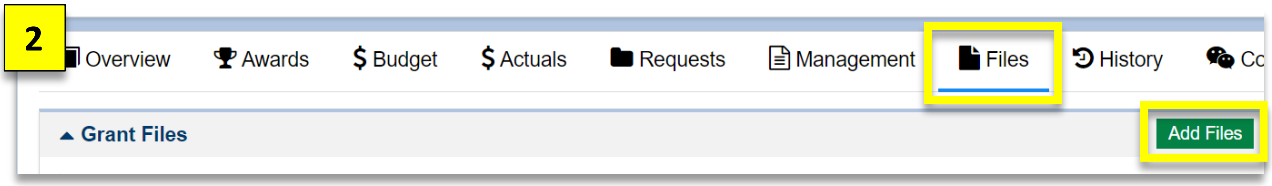


The detailed walkthroughs below have more information about activity-specific statuses and what they signal.

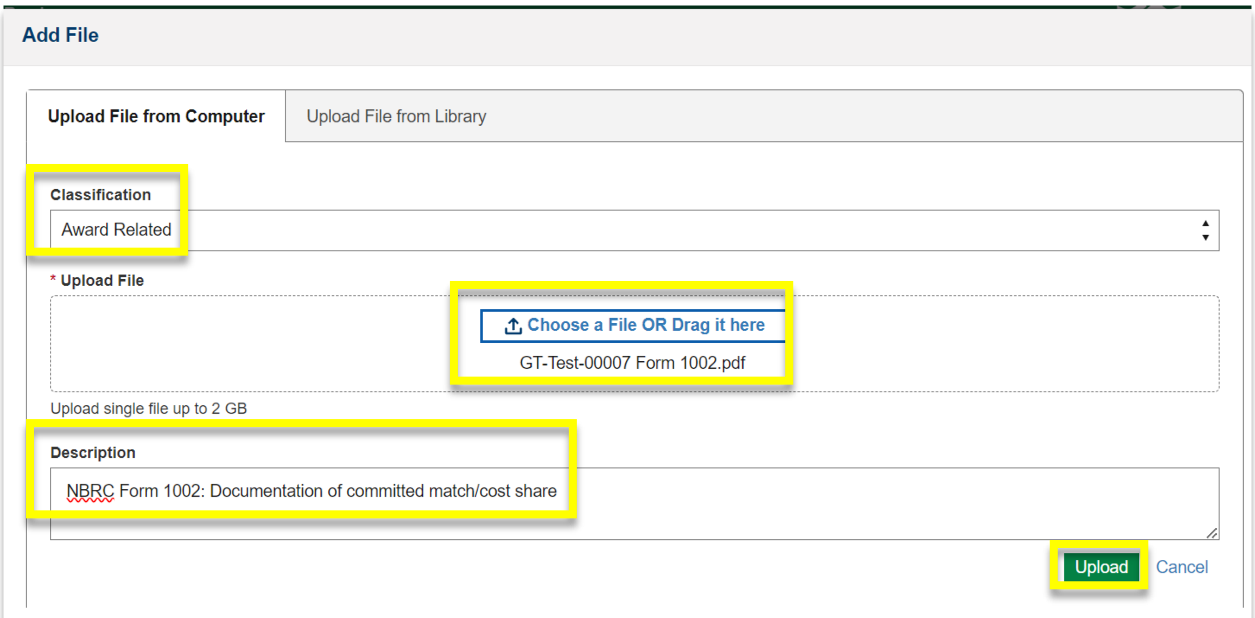
1.4 Uploading Files

Each record has its own set of files that can be uploaded to it, so if you upload a file to a record in response to a request from NBRC, it's good to make note of the [EGMS ID](#) of the record for quick reference. **Please upload any related supporting documentation as a <u>single</u> pdf (i.e. multiple letters of support documenting committed match funds; all invoices supporting a payment request)**.

1. Navigate to the record you're working on. Click on the tab labeled either "Files" or "Forms and Files"
2. You will see a section labeled "[record type] Files" and in most cases will see an "Add Files" button



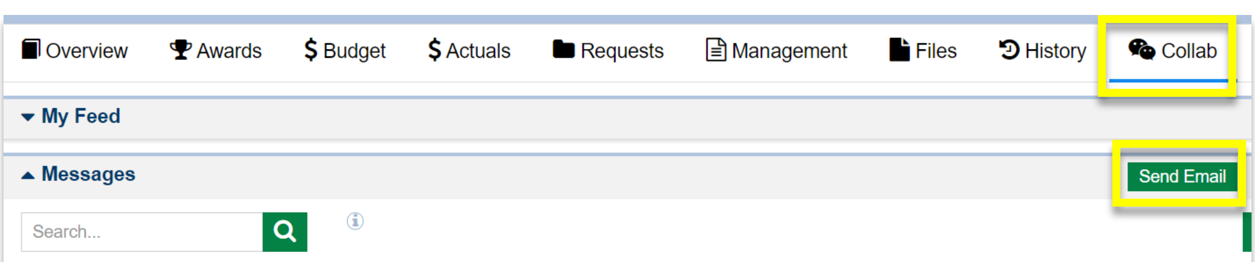
3. Select the file for upload
   a. Select the most appropriate Classification for your document
   b. Select the file from your computer
   c. Add a description for the file
   d. Click Upload button



1.5 Using the Collab Tab

The Collab tab is where you can send and receive emails directly in the system to communicate about records you're working on. Just as files can only be viewed on the record they were uploaded to, you will view and respond to conversations on a record-by-record basis.

1. Navigate to the record you're working on. Click on the tab labeled "Collab"
2. Under the Messages section, you can view conversations or press the "Send Email" button
3. **Include the <u>EGMS ID</u>** found toward the top-left of the page in the subject line of the email

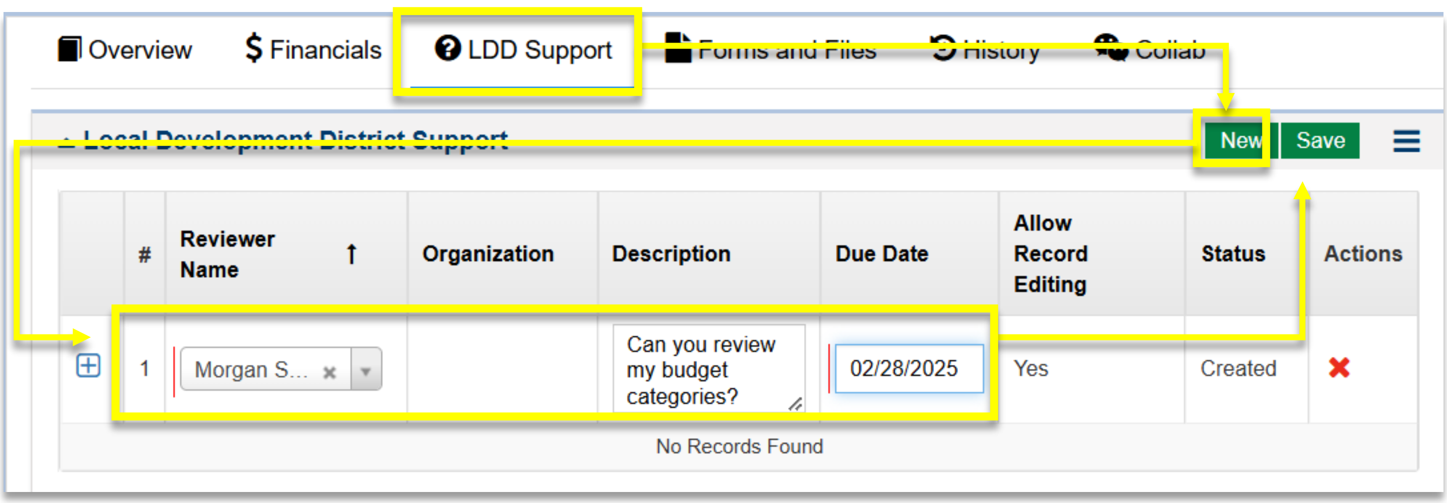


1.6 Sending LDD Requests (Important)

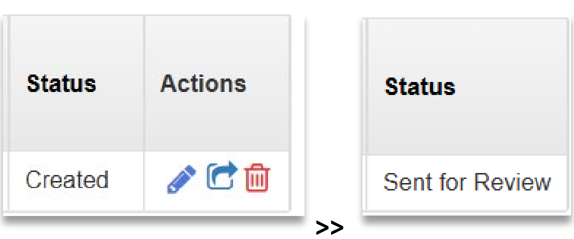
If working with an LDD, **<u>you must initiate these requests in the system</u>** on a regular cadence. The LDD will be able to edit, but **you must also log in and finalize** submission of the following items:

- [Progress Reporting]() – Once your grant agreement has been fully executed, you should navigate to the available progress report records and initiate the review (these records are in a draft state, and this will allow the LDD to make edits far in advance of their being due)
    - **At the beginning of each quarter**, new draft reporting will be generated by the system – you should log in and initiate review for any available progress report records
- [Reimbursements]() – as soon as your grant agreement has been fully executed, you should create your first draft reimbursement request and initiate LDD review (this will allow the LDD to be proactive in assisting with that first request)
    - **For any subsequent payment requests**, create the draft request early and initiate the review
- [Amendments]() – Once your award is active, if changes are needed, create the draft amendment request and initiate the review early so the LDD can provide support

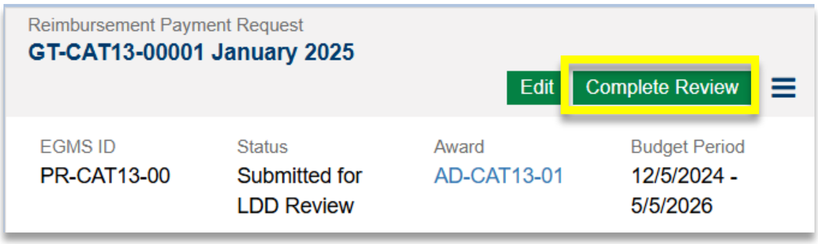
1. Create the request
    a. Navigate to the LDD Support tab and click New
    b. Enter the name of your LDD contact, a description and due date
    c. Click Save



2. Send the request
    a. When the page refreshes, be sure to click the arrow icon (). The Status will change from “Created” to “Sent for Review”



3. Complete the Review
    a. You and the LDD can work on the record simultaneously, but you will need to click the Complete Review in order to finalize the request. <u>Note that the LDD will be unable to make edits to the request once the review has been completed</u>.



4. Submit the record
    a. <u>The LDD cannot submit the record for you</u>; a user on your organization account with the "Primary" designation must log in, navigate to the record, and finalize the submission.

2. Award Initiation

2.1 Confirm your Banking Information

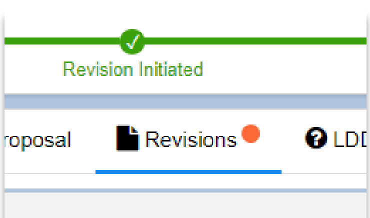
New for 2025 You do not need to fill out and upload an ACH form. Instead:

1. **<u>Important:</u>** Confirm your SAM.gov registration is active and that your organization's correct banking information is on file. **NBRC cannot obligate funds for your award unless this step is completed.**
    a. The following link addresses common questions about managing your SAM.gov account: https://www.fsd.gov/gsafsd_sp?id=kb_article_view&sysparm_article=KB0039526
2. Navigate to your Organization Profile and confirm your UEI is correct and that your GMS account is connected to SAM.gov
    a. See "Manage Your Organization's Account and Contacts" guidance (https://www.nbrc.gov/content/administration)

2.2. Completing Required Document Revisions

Refer to the email detailing which items need revision. You will have received a pending task to complete this step.

1. Navigate to the application record
2. In the Collab tab, you will find the award letter and any additional communication regarding required documents revisions.
3. Additional revisions notes may appear in the Revisions tab of the application record:



    a. If you have any additional items to complete, these will be laid out in the "Explanation of Revisions Needed" section

Available Forms for Revision

Showing 1 to 4 of 4 records

Form Name	Needs Revision
Application for Federal Assistance (SF-424)	✖
Assurances for Construction Programs (SF-424D)	✖
Assurances for Non-Construction Programs (SF-424B)	✖
Disclosure of Lobbying Activities (SF-LLL)	✖

Total Records:4

Applicant Response

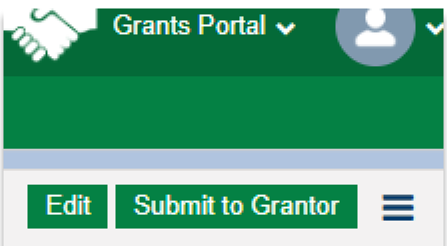
Details

Explanation of Revisions Needed

Details

See the award letter issued by email or view in the "Collab tab" section of the GMS for specific revision or document requests.

4. Submit your revisions

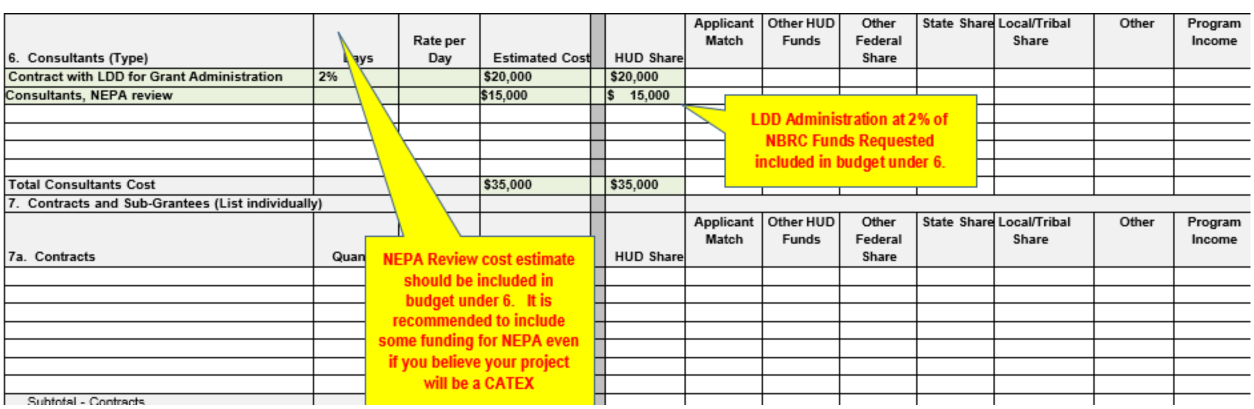


<u>Updating your project budget</u>

The budget for your project should align across your SF-424cbw budget spreadsheet, the Budget Categories table, and the Funding Sources and Commitments table. See below for general guidance on each of those items.

<u>SF-424cbw budget spreadsheet - Details tab</u>

- Add LDD costs to line 6. Consultants
- Add NEPA costs (if not used, these costs can be reallocated to other costs) to 6. Consultants



Once updates are made, save the file and upload to Forms and Files tab > Supporting Documents Checklist section (this will overwrite the previously uploaded version of your budget)

				Actions
SF424-cbw	Mandatory	View	View	

Budget Categories table

1. Go to Budget tab > scroll to Budget Periods section
2. Click plus icon (⊞) to expand/open budget categories table
3. Under Actions, click the blue pencil icon ( ) to update amounts
   a. The amounts for each Category should equal the rolled-up “Total Cost“ for the corresponding Category in the SF-424cbw

Category Name ↑	NBRC Share	Other Federal Share	Applicant Match	Other	Total Project Cost	Act
Focus Area : Standard Focus Area						
Construction	$1,000,000.00	$1,900,000.00	$0.00	$979,700.00	$3,879,700.00	

↑ *Budget categories table compared to SF-424cbw* ↓

8I. Miscellaneous	Quantity	Unit Cost	Estimated Cost	HUD Share	Applicant Match	Other HUD Funds	Other Federal Share	State Share	Local/Tribal Share	Other	Program Income
(Misc construction expense #1)			$15,000	$ 15,000							
Construction management services			$100,000	$ 100,000							
Subtotal - Miscellaneous			$115,000	$115,000							
Total Construction Costs			$3,879,700	$1,000,000			$1,900,000			$979,700	

4. Click Save button (Save) in Budget Periods section
   a. **Note:** In Budget Categories table, the totals for “NBRC Share” column plus “Other Federal Share” column cannot be greater than 80% of “Total Project Cost” column. You will get an error message if you try to submit and are over the 80% threshold.

Funding Sources and Commitments table

1. Go to Budget tab > scroll to Funding Sources and Commitments section
2. Under Actions, click the blue pencil icon ( ) to update Amount and (if applicable) Status
   a. The amounts for each Funding Source line should equal the “Total Cost“ for the corresponding Category in the SF-424cbw **Do not include NBRC funds here**

Funding Source	Type of Funding	Amount
USDA	Federal	$1,900,000.00
ABC Foundation	Private investment	$979,700.00
		$2,879,700.00

↑*Funding Sources table compared to SF-424cbw*↓

8I. Miscellaneous	Quantity	Unit Cost	Estimated Cost	HUD Share	Applicant Match	Other HUD Funds	Other Federal Share	State Share	Local/Tribal Share	Other	Program Income
(Misc construction expense #1)			$15,000	$ 15,000							
Construction management services			$100,000	$ 100,000							
Subtotal - Miscellaneous			$115,000	$115,000							
Total Construction Costs			$3,879,700	$1,000,000			$1,900,000			$979,700	

3. Click Save button (Save) in Funding Sources and Commitments section
    a. **Note:** In the Funding Sources table, the bolded total amount must equal the "Total Project Cost" amount minus the "NBRC Share" amount in the Budget Categories table above. You will get an error message if you try to submit and those amounts do not match.

Updating your project contacts

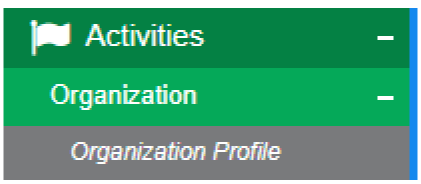
Add your LDD contact

1. Go to the Overview tab and scroll down to Contacts
2. Click Associate button* and search for the LDD point of contact for your project (If you're not sure, look for who is cc'd on your award notification in Collab > Messages)
3. Check the box next to their name, click Add
4. Click the pencil icon next to their name and update their Project Role to "LDD Contact" and hit Save

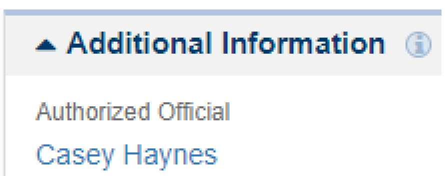
*If the Associate button is not showing up for you, it is likely that the project was promoted to the next phase and the record is locked. NBRC is addressing each of those cases individually and will follow up as needed.

Make sure your Authorized Official is correct

1. Click Home button near top of page
2. Click Organization Profile on left sidebar



3. On Overview tab, scroll down to Additional Information



If the person listed as your Authorized Official in the system is not the individual given explicit authority to sign off on grantmaking activities by the Authorized Official Resolution uploaded during the application process, contact admin@nbrc.gov for assistance in making that change.

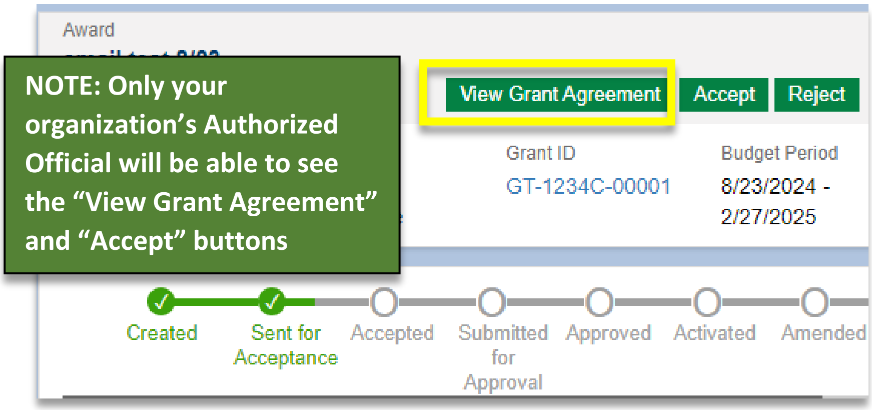
Adding an additional user to your org account

To add another person from your organization so that they can log in and assist with grantmaking activities, see the "Managing GMS Accounts and Contacts" guide: https://www.nbrc.gov/content/administration

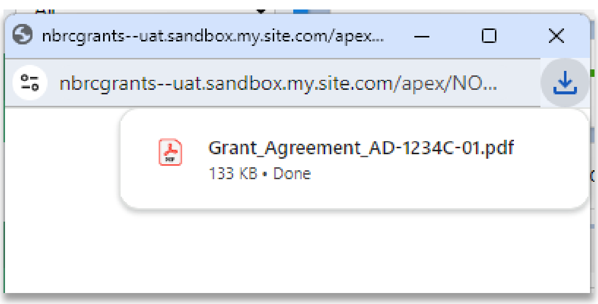
3. Executing Your Grant Agreement

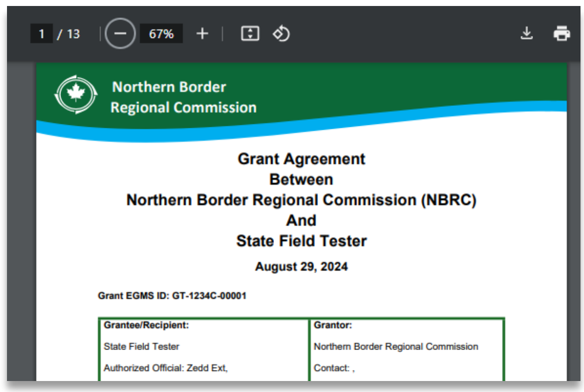
3.1 Review and Signature

1. Locate the "Award Review" pending task or navigate directly to your award record
2. Click View Grant Agreement

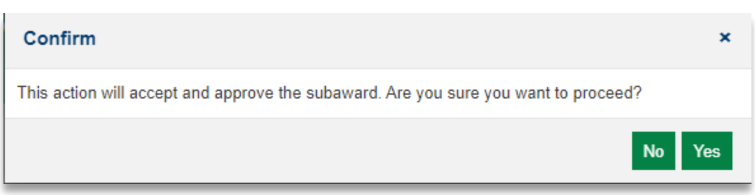


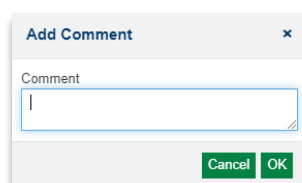
3. You will be prompted to download the file and review the agreement:



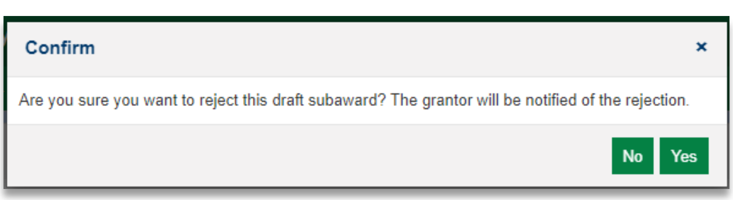


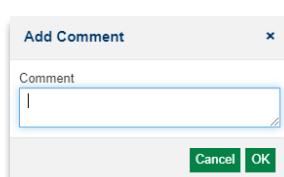
4. If the information in the grant agreement is correct, click Accept > Yes > Add any comments and click OK. Acceptance of the Grant Agreement equates to your signature. **By accepting the Grant Agreement, you are concurring with the information laid out and agreeing to the terms, conditions, and administrative requirements set forth within the agreement.**



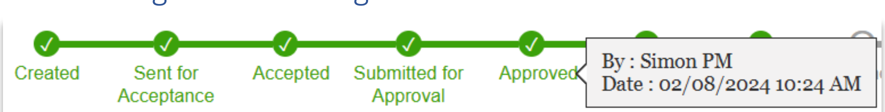


5. If information in the agreement is incorrect or needs to be amended, click Reject > Yes > Add your comments and click OK. NBRC will work with you to correct the information and return an amended award for you to review.





3.2 Checking Status and Signature Record



- Sent for Acceptance: NBRC staff has compiled the project information for your review
- Accepted: You have viewed and signed the grant agreement and NBRC has been notified
- Submitted for Approval/Approved: NBRC has received your acceptance and is executing the agreement internally

Note: you will also be able to view the full text of the executed grant agreement any time from the Files tab of your Active Award record

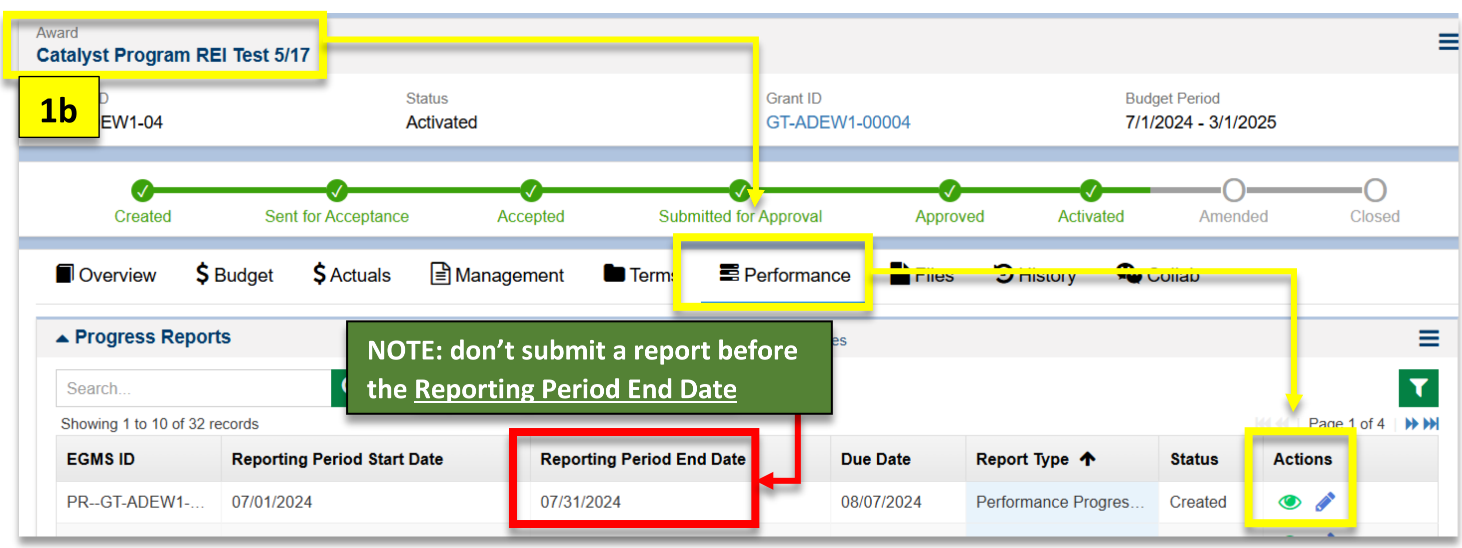
4. Uploading NTP Documentation

1. Navigate to your Grant record (Note: your grant agreement must be signed for that grant record to be viewable)
2. Click the Files tab. In the Grant Files section, click the Add Files button
3. Select the file for upload
    a. Set Classification to "Award Related"
    b. Select the file from your computer
    c. Add a description for the file
    d. Click Upload button
4. Notify NBRC
    a. Navigate to Collab tab of grant record
    b. In the messages section, click the Send Email button
    c. Compose a message to admin@nbrc.gov to notify us that you have uploaded the required documentation. NBRC staff will review and follow up if any additional information is required.

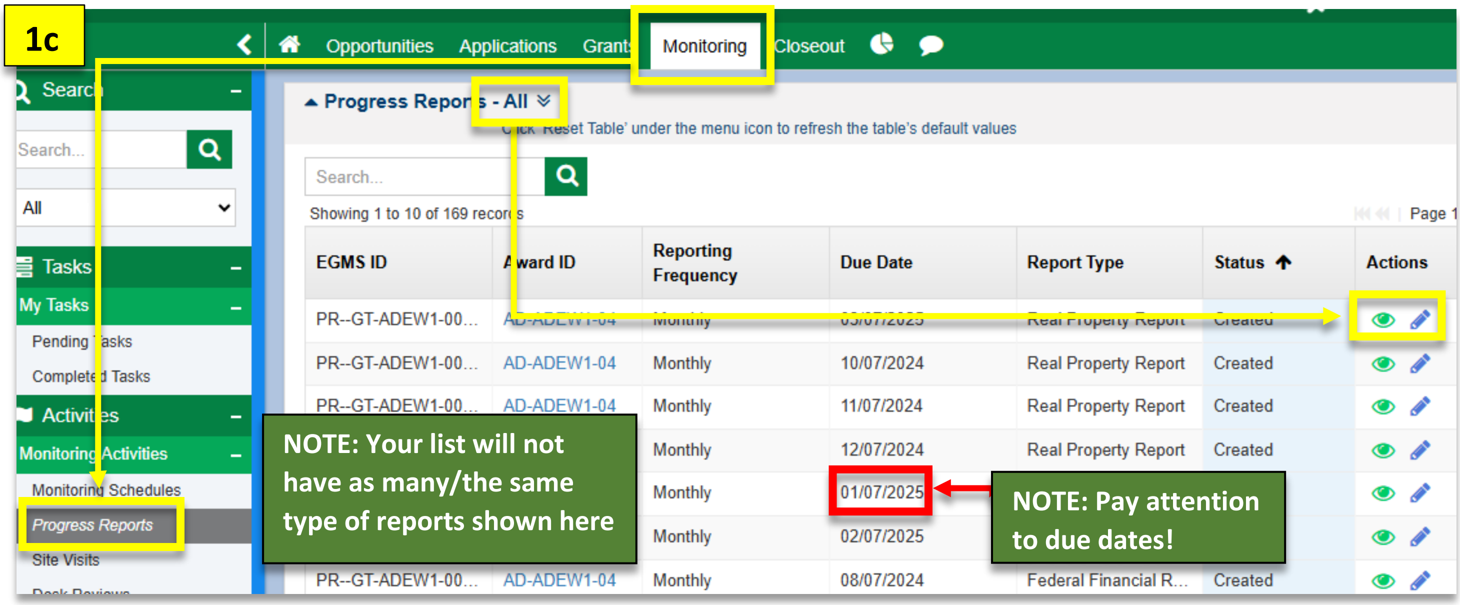
5. Reporting

If you have a grant in the GMS, reporting for that grant must be submitted via the system. You should only submit reporting to admin@nbrc.gov for grants received in 2023 and prior.

1. Navigate to the pending report record
    a. Find the pending task
    b. OR go to your Active Award > Performance tab > Progress Reports section and click the Edit icon



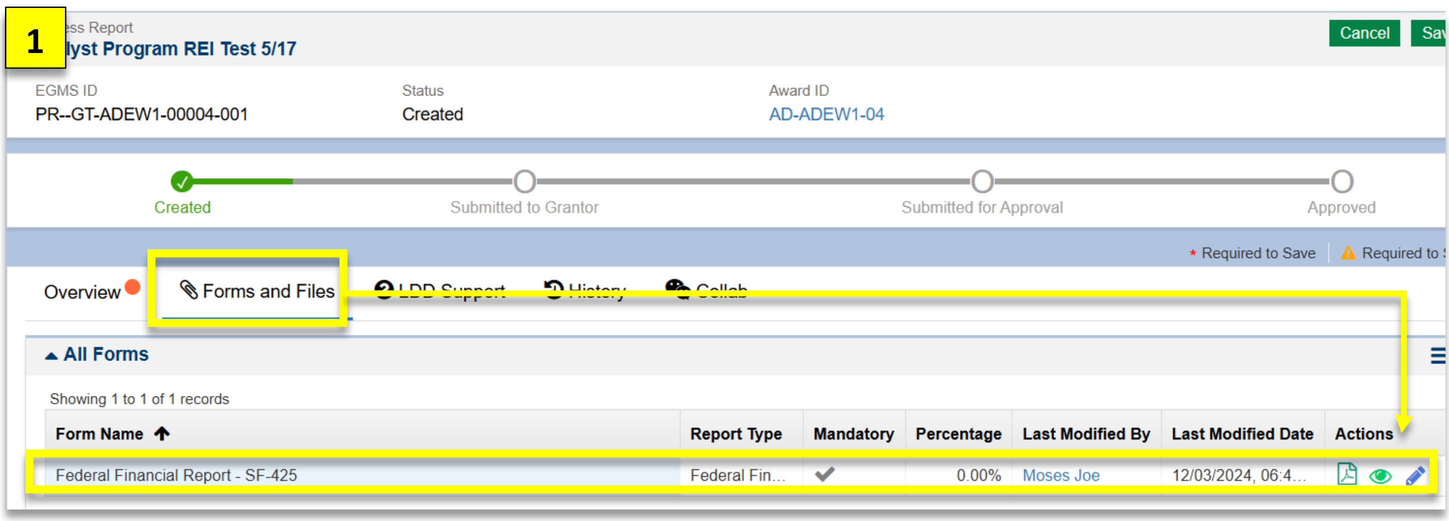
    c. OR go to the Monitoring page > click *Progress Reports* on the lefthand sidebar > select Progress Reports – All. This will show you each of your pending and completed reports.



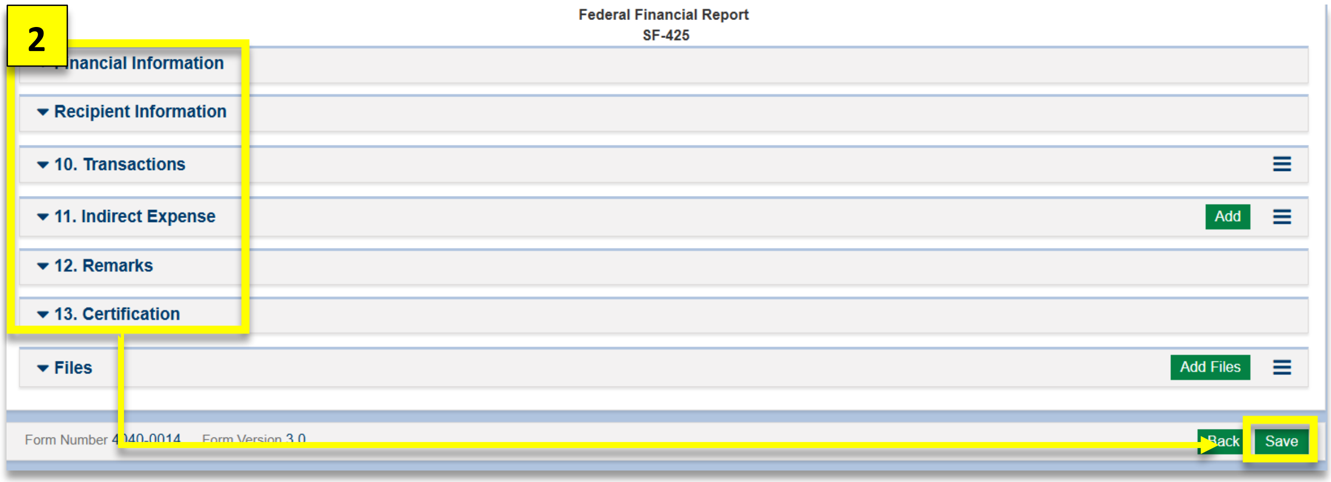
NOTE: Be sure to initiate a LDD review

5a Federal Financial Report (SF-425)

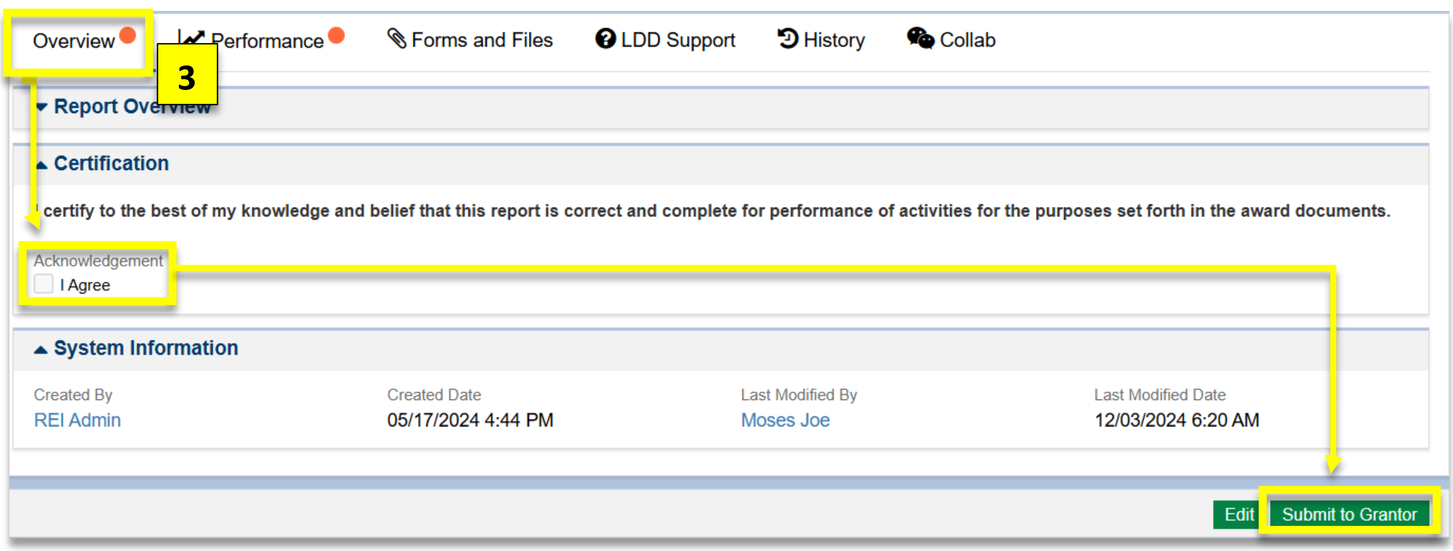
1. In the Progress Report record, click the Forms and Files tab > All Forms section > Click the edit icon



2. Complete/review each section of the SF-425 and click the Save Button

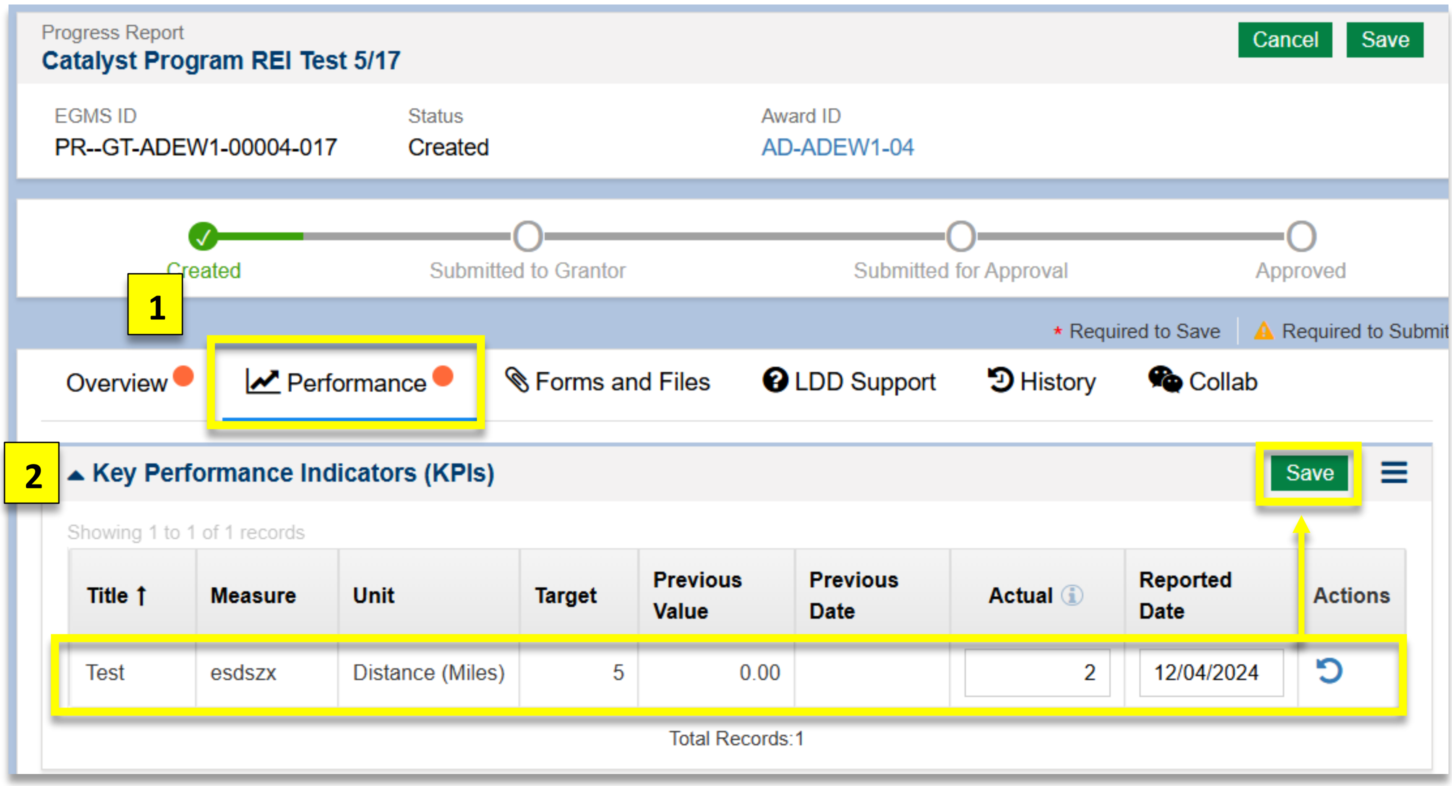


3. Click the final certification and submit
    a. Click the Back button to return to the Progress Report record.
    b. Navigate to the Overview tab
    c. Scroll down to Certification section
    d. Click "I agree" box
    e. Click Submit to Grantor button

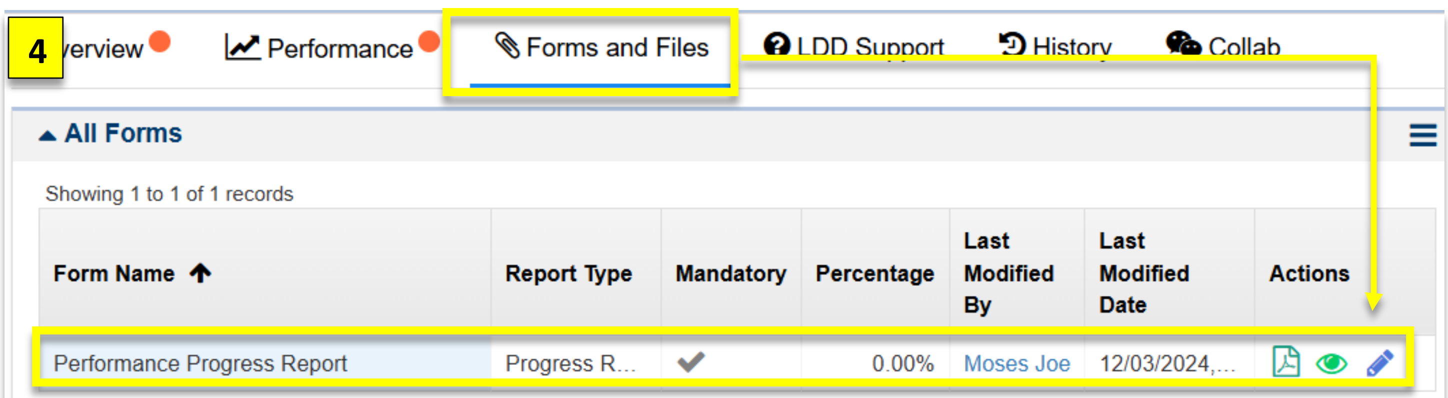


5b Performance Progress Report (SF-PPR)

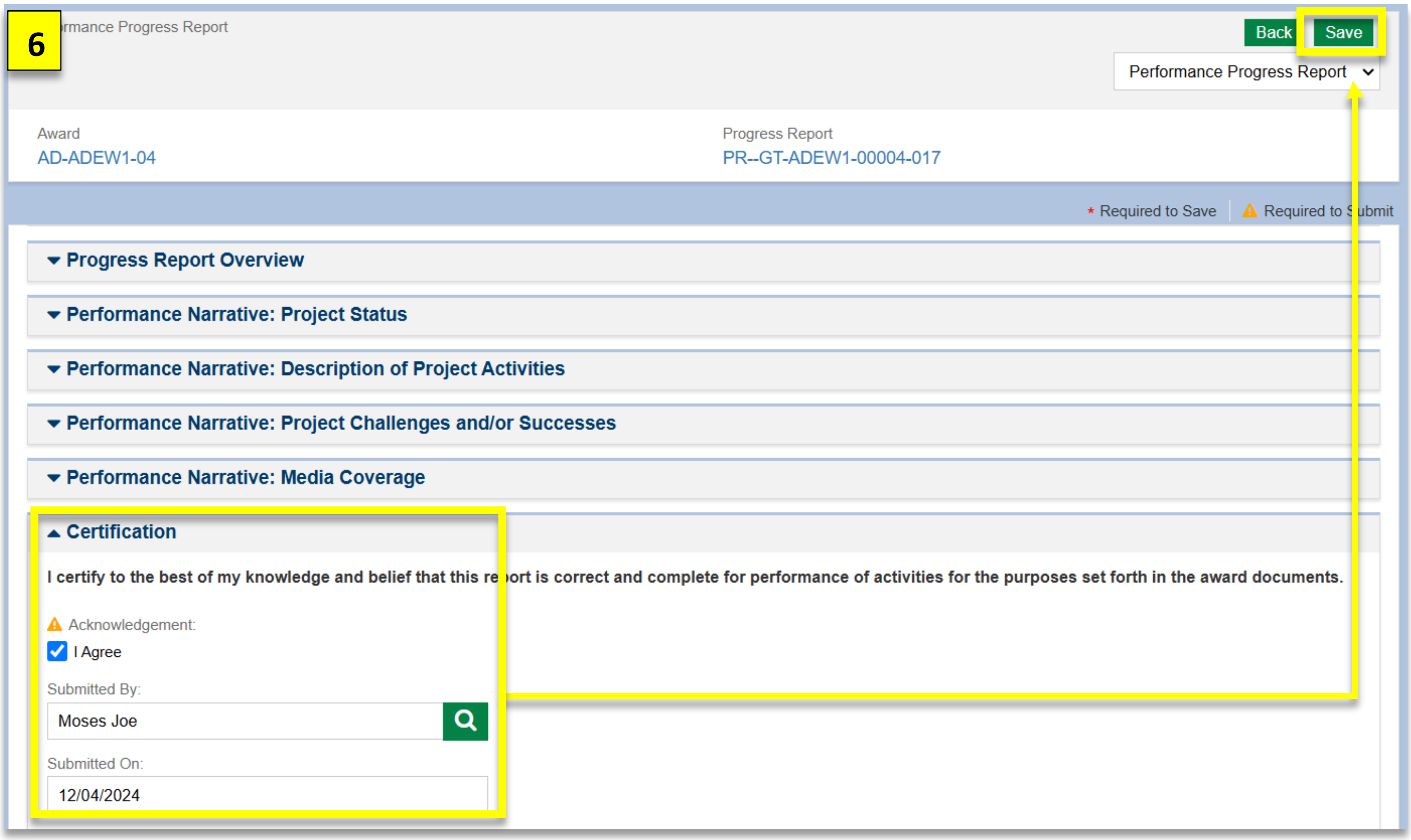
1. In the Progress Report record, click the Performance tab
2. Edit the Key Performance Indicators (KPIs) and click the Save button in that section



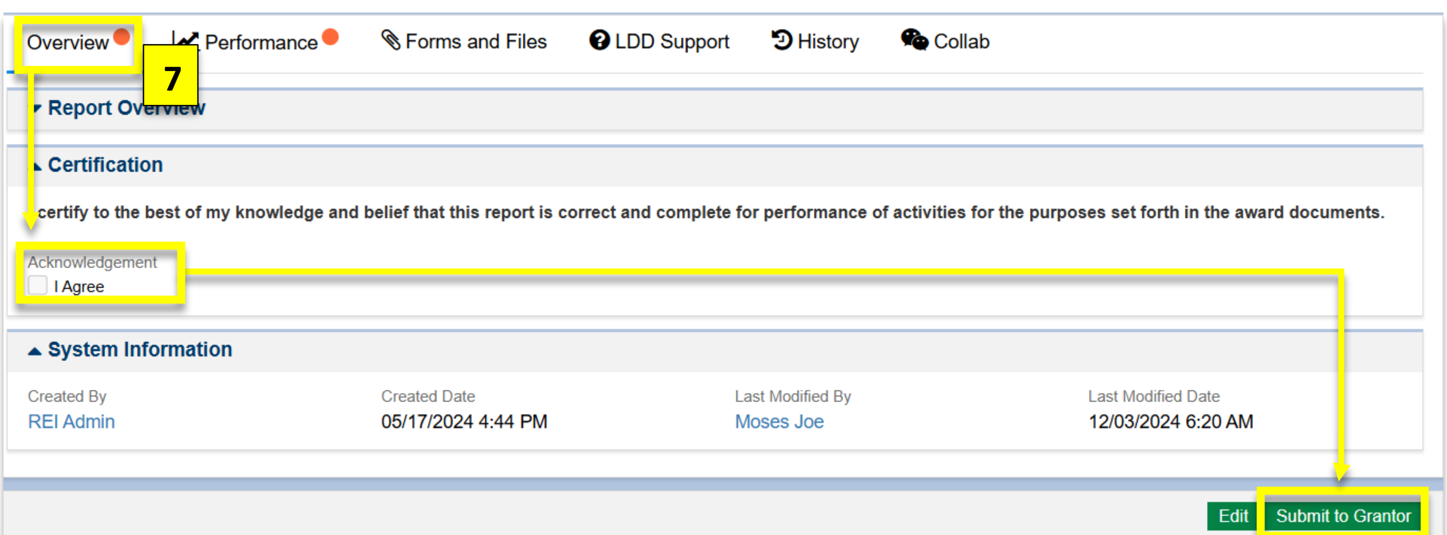
3. Go to the Forms and Files tab > All Forms section > Click the edit icon



4. Fill out each of the Performance Narrative sections
5. Complete the Certification section and click Save



6. Click the final certification and submit
    a. Click the Back button to return to the Progress Report record.
    b. Navigate to the Overview tab
    c. Scroll down to Certification section
    d. Click "I agree" box
    e. Click Submit to Grantor button



5.1 Tracking the Status of Your Reporting

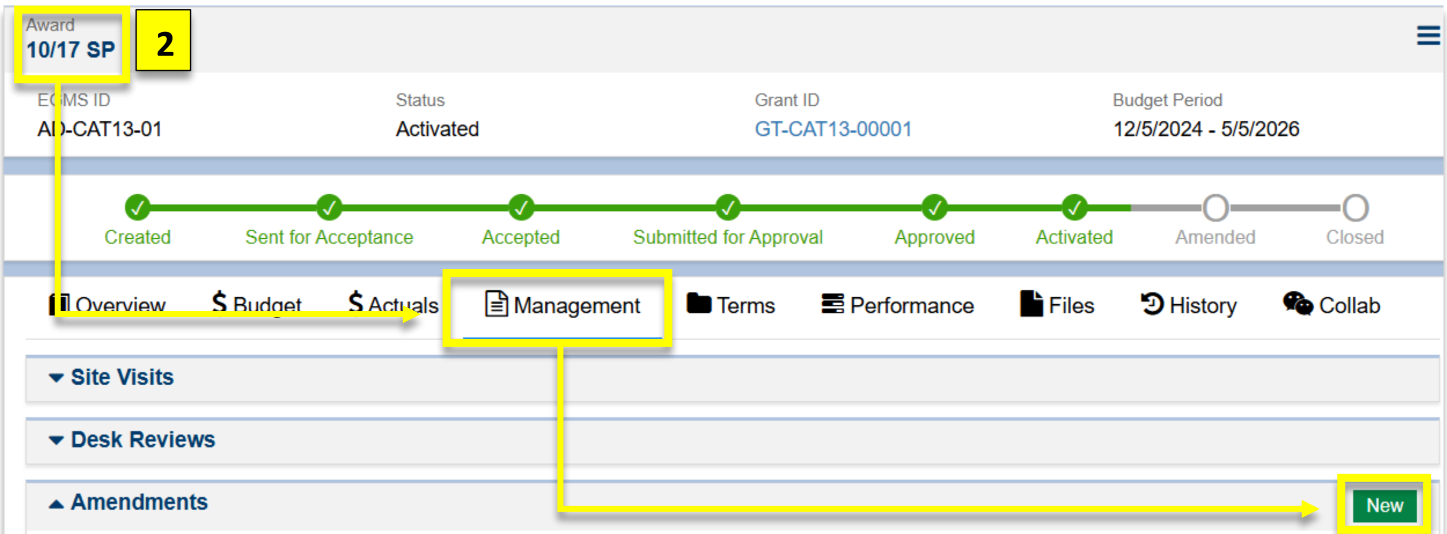
- "Created": the report is created and in a draft state

- “Submitted to Grantor”: You have submitted the report to NBRC and it is awaiting review
- “Submitted for Approval”: NBRC staff had conducted an initial review of the request and has sent it for final approval
- “Approved”: NBRC has approved the report

6. Project Amendments

Initiating the request:

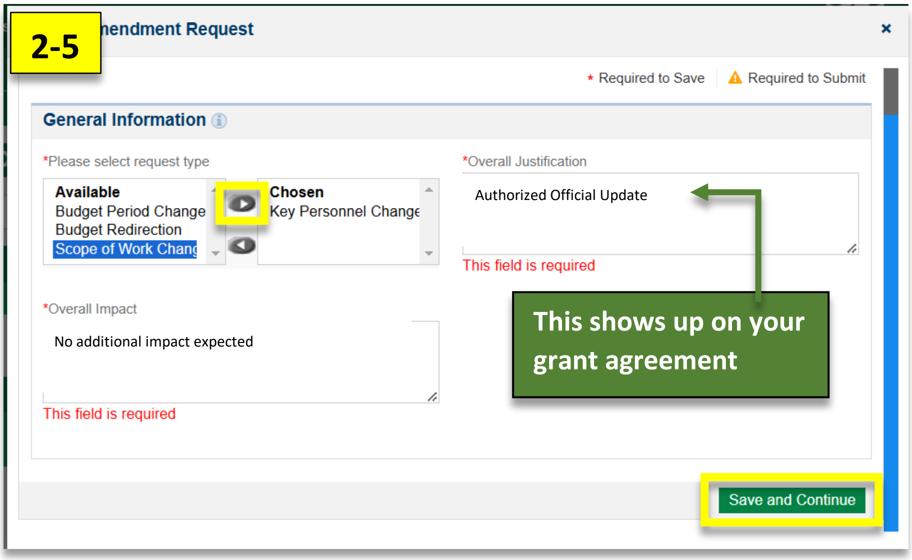
1. Navigate to your Grant’s Active Award record
2. In the Management tab, scroll to the Amendments section and click New



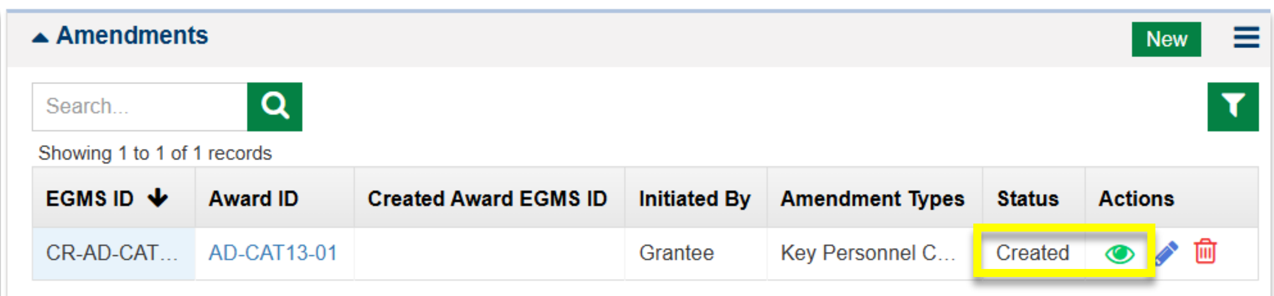
3. In the Create Amendment Request window, choose the type(s) of project changes you want to make. <u>You can choose multiple options,</u> and you will be prompted to provide additional information in alignment with each requested change.
    a. Key Personnel Change
    b. Scope of Work Change
    c. Budget Redirection
    d. Budget Period Change
4. Fill out the Overall Justification and Overall Impact fields
    a. “Overall Justification” should be a <u>brief* (no more than 4-6 words)</u> description of the nature of the change. Here are some examples:
        i. Authorized Official Update
        ii. Budget/Scope Change
        iii. Project Extension
        iv. Key Personnel Change

*You will have space to describe the change in more detail on the next screen.

5. Hit Save and Continue



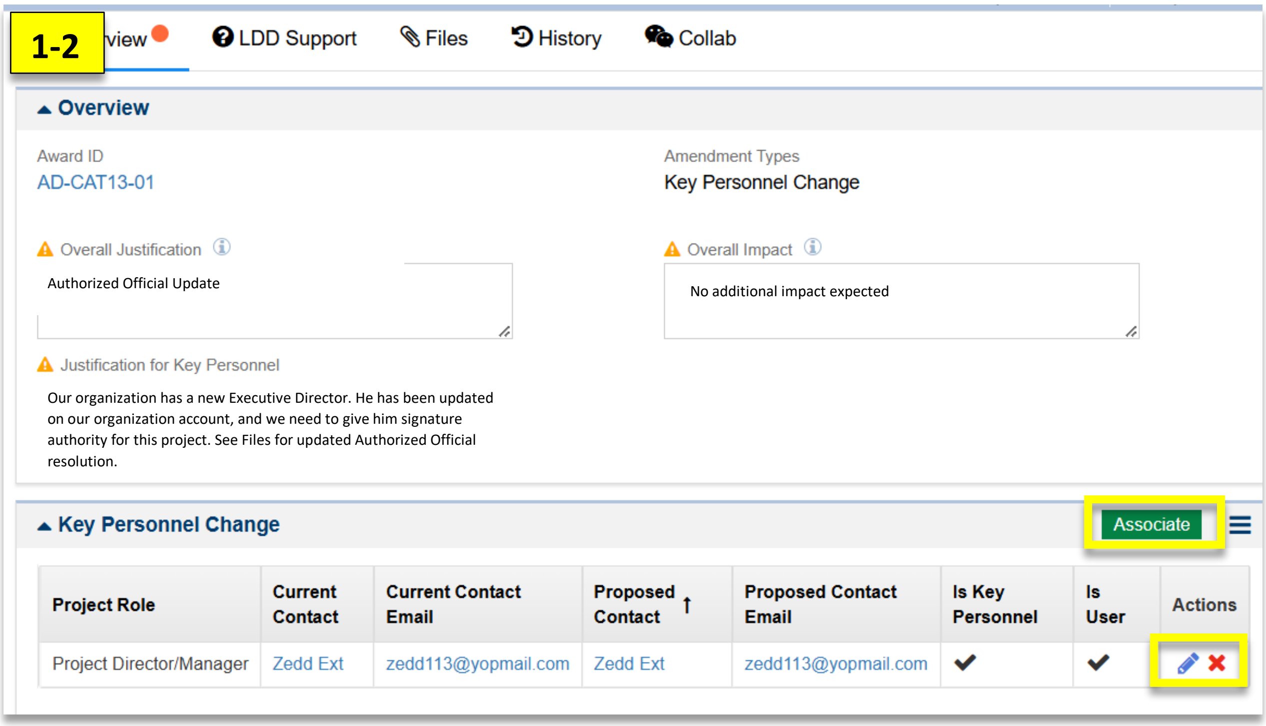
6. The page will refresh and you will be on the newly-created draft request record. If you exit and need to return to the record, navigate back to the Active Award > Management tab as above and your request records will appear.
7. Be sure to [initiate a LDD review]

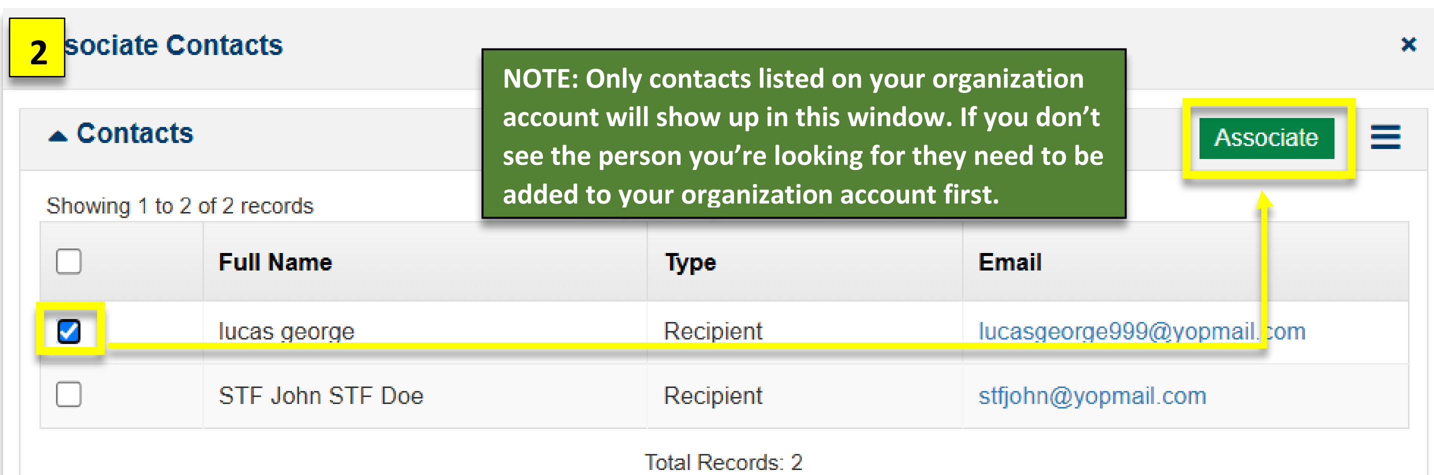


6a. Key Personnel Change (AO)

Keeping your project's contacts current in the GMS will enable NBRC to ensure critical grant information is getting to the right people. **If your organization needs to update its Authorized Official** to sign off on documentation, you will also want to refer to the "Managing GMS Account and Contacts" guidance to make sure that person has access to the GMS.

1. Fill out the Justification for Key Personnel in the Overview section.
2. Edit the project contacts
   a. You can click the pencil icon to update an existing contact's Project Role and/or
   b. Click the Associate button to add another contact onto the project record





3. If updating Authorized Official, upload an updated Authorized Official resolution to the Files section of your amendment request record

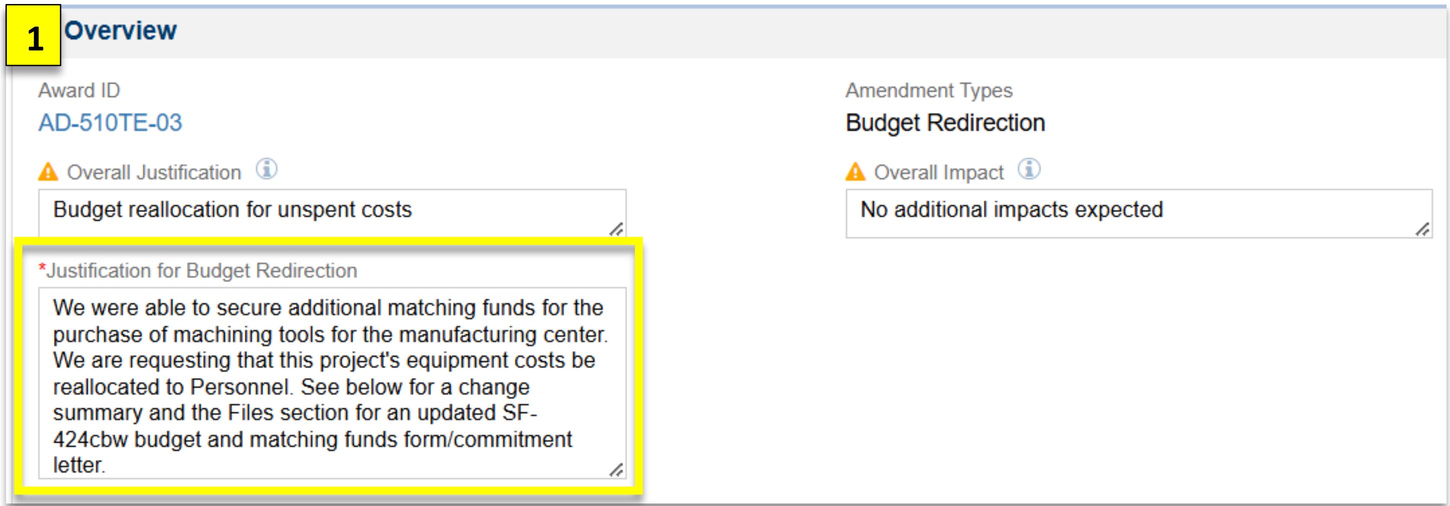
6b. Scope of Work Change

If your scope of work change involves budget adjustments of any kind, be sure to also select the "Budget Redirection" option when creating your request.

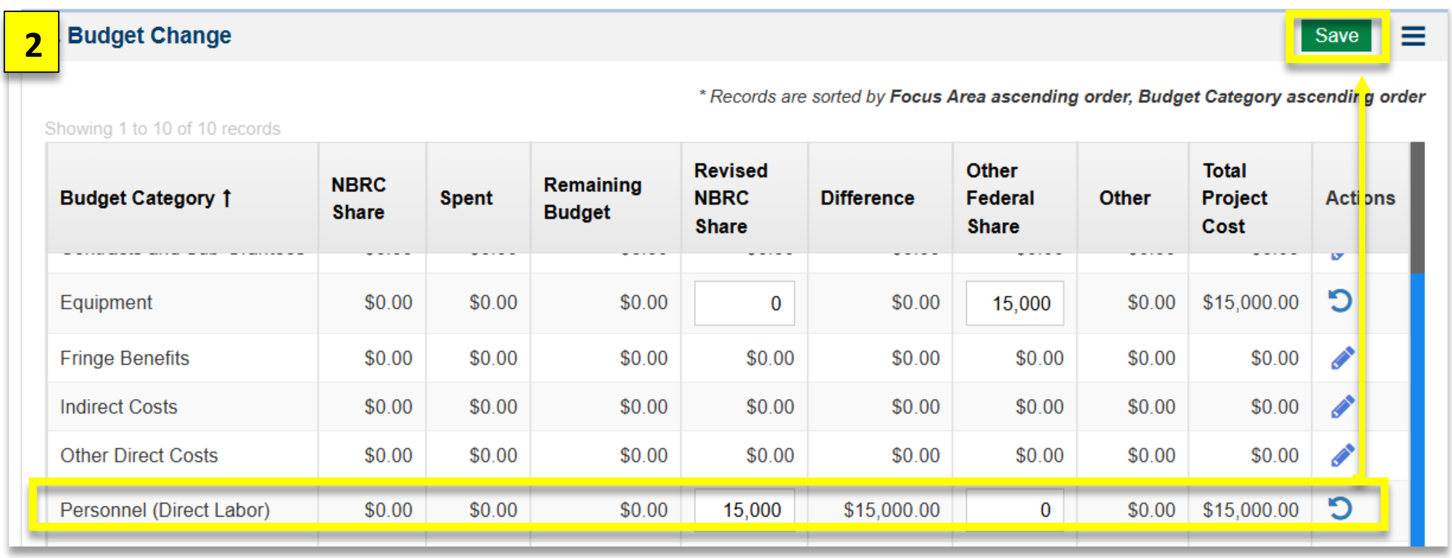
1. Fill in the Justification for Scope of Work Change field
2. Update the Award Details field
3. Update Key Performance Indicators table
4. Upload any relevant documents to the Files tab > Amendment Files section

6c. Budget Redirection

1. Fill out the Justification for Budget Redirection



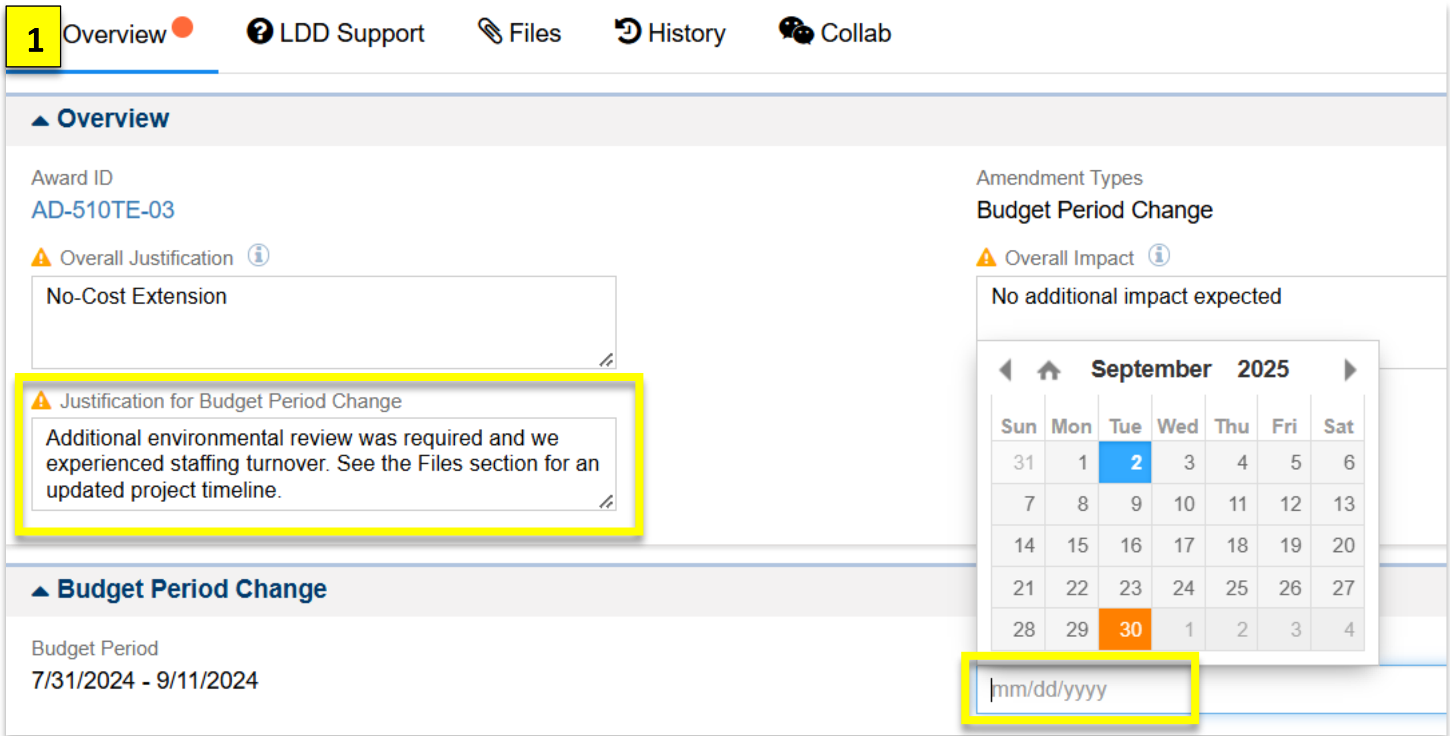
2. Update the Budget Category lines in the Budget Change section and click Save



3. Upload an updated SF-424cbw and (if applicable) an updated Form 1002 match certification and letters of commitment to the Files tab > Amendment Files section.

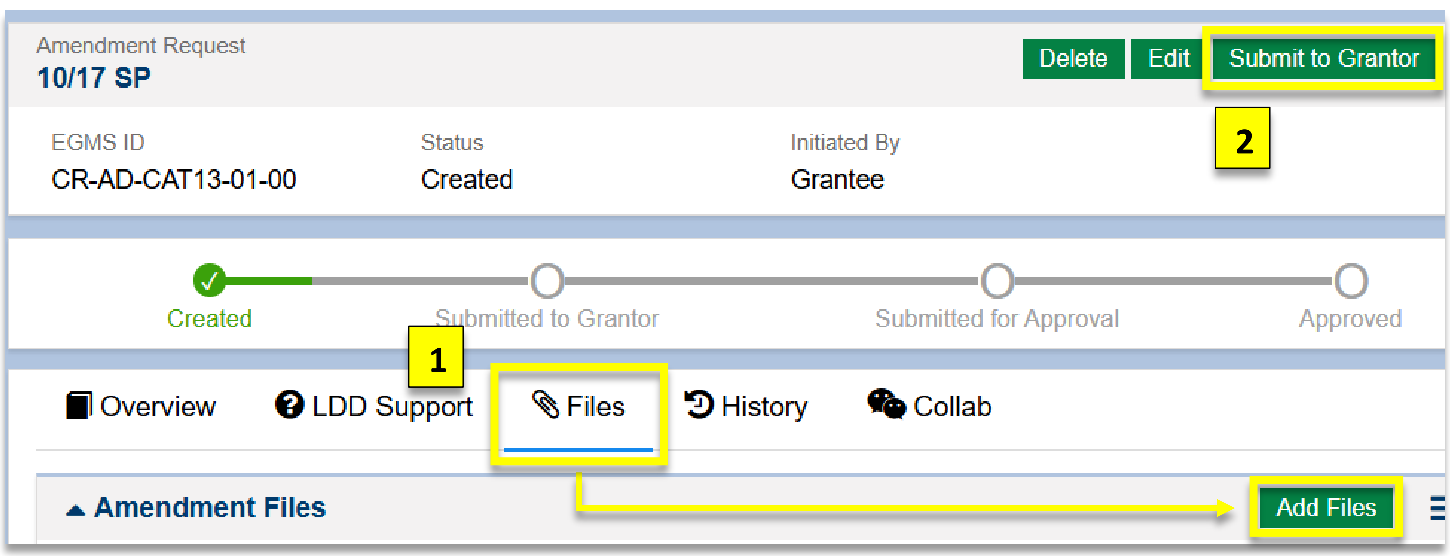
6d. Budget Period Change (Project Extension)

1. Fill out the Justification for Budget Period Change and the New Budget Period End Date fields
2. Upload an updated project timeline to the Files tab > Amendment Files section



6.1 Upload Documentation and Submit

1. Upload the relevant documentation in support of your requested change(s)
2. Click Submit to Grantor button and then click Yes on the confirmation window



6.2 Review and Sign Your Amended Award

Once NBRC has reviewed and approved the request, a new award record and updated grant agreement will be generated, which your Authorized Official will need to review and approve.

1. Locate the "Award Review" pending task, review the updated grant agreement and click Accept (see Executing Your Grant Agreement section for more detail about this step)
2. NBRC will execute the agreement and activate the amended award

6.3 Tracking the Status of Your Request

Amendments involve two separate record types in the system. The first phase

Amendment Request record

- "Created": the request is created and in a draft state
- "Submitted to Grantor": You have submitted the request to NBRC and it is awaiting review
- "Submitted for Approval": NBRC staff had conducted an initial review of the request and has sent it for final approval
- "Approved": NBRC has approved the request and will generate the amended award record for review and signature

Amended Award record

- See Executing your Grant Agreement for additional detail on award statuses

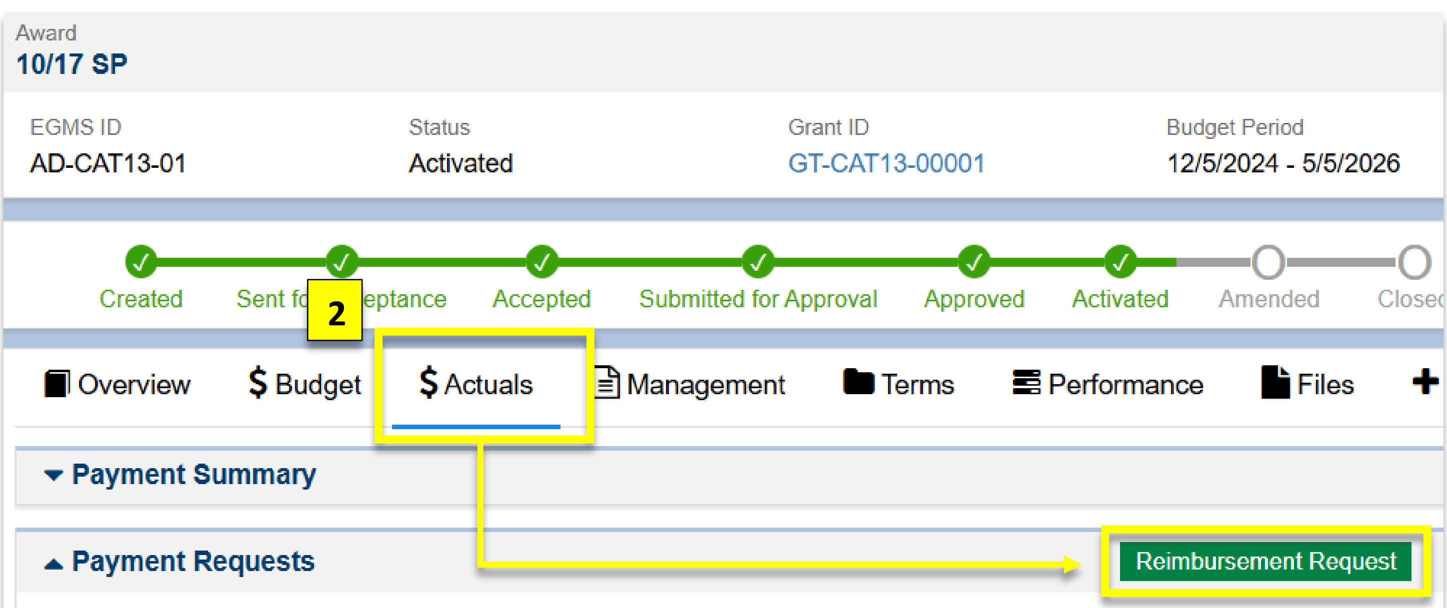
7. Reimbursements and Desk Reviews

Be sure to have the following documents available:

- Most current approved project budget. You can find this budget attached to your project's application record (or in the Award record if an amendment has been processed).
- Whatever tool you use to keep track of your project expenses. NBRC's Resources page has a template Expense Tracker (for 2024 grantees and forward) designed to assist with organizing your expenses and submitting reimbursement requests in NBRC's GMS.

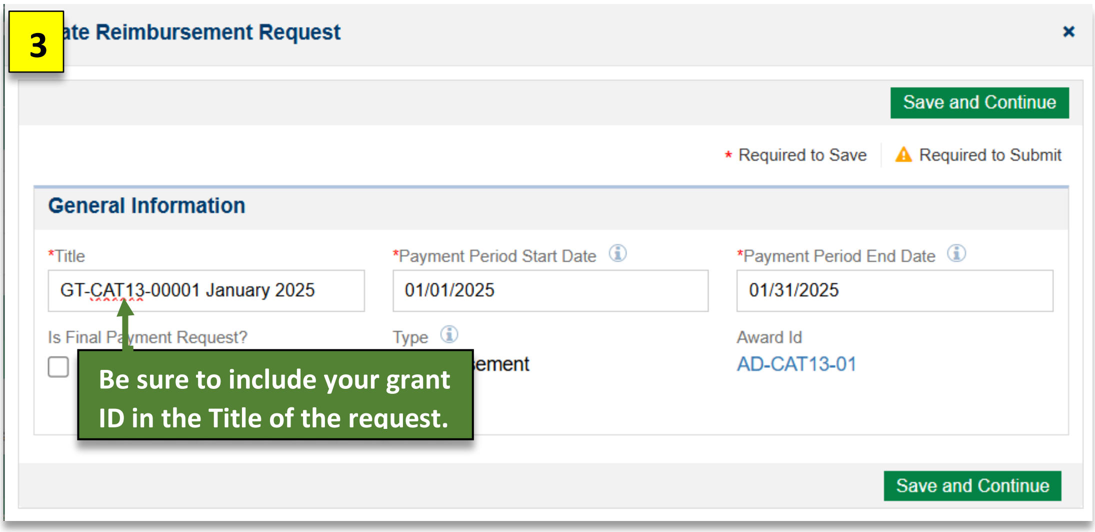
7.1 Starting Your Request

1. Navigate to your Active Award
   a. Click the Grants page, make sure the page is showing "Grants – All"
   b. Click the blue "AD-" link under the Active Award column
2. Click the Actuals tab, scroll down to the Payment Requests section, and click the Reimbursement Request button.

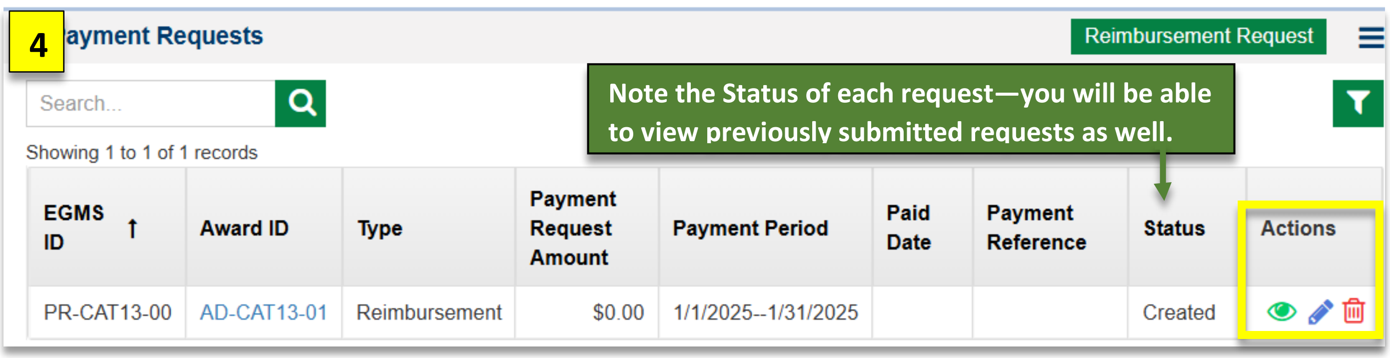


3. In the "Create Reimbursement Request" window, fill out the required fields. Click Save and Continue.

a. **For Title**: use your Grant ID and MM/YY (ex. GT-CAT-00013_05/25_Reimb#2)



4. The page will refresh and you will be on the newly-created draft request record. If you exit and need to return to the record, navigate back to the Active Award > Actuals tab as above and your request records will appear.

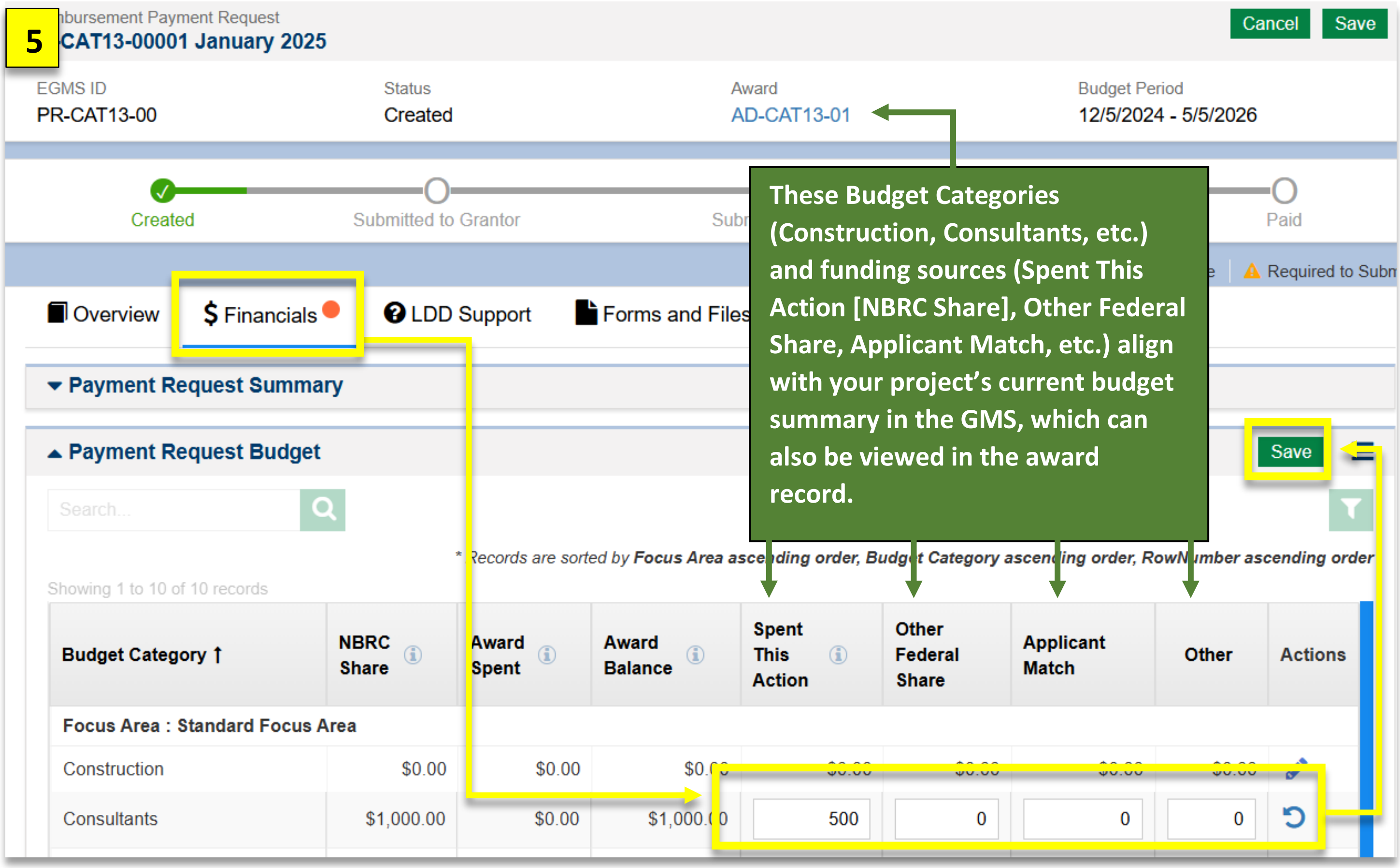


a. From the Monitoring page, you can also click *Reimbursements* on the lefthand navigation bar to view a list of all of your reimbursement requests

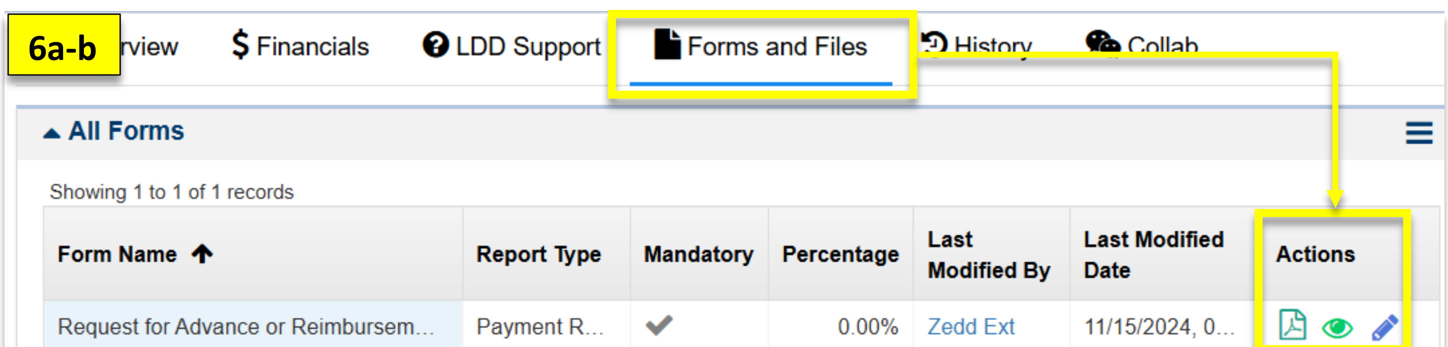
7.2 Completing and Submitting Your Request

NOTE: Be sure to initiate a LDD request if working with a LDD

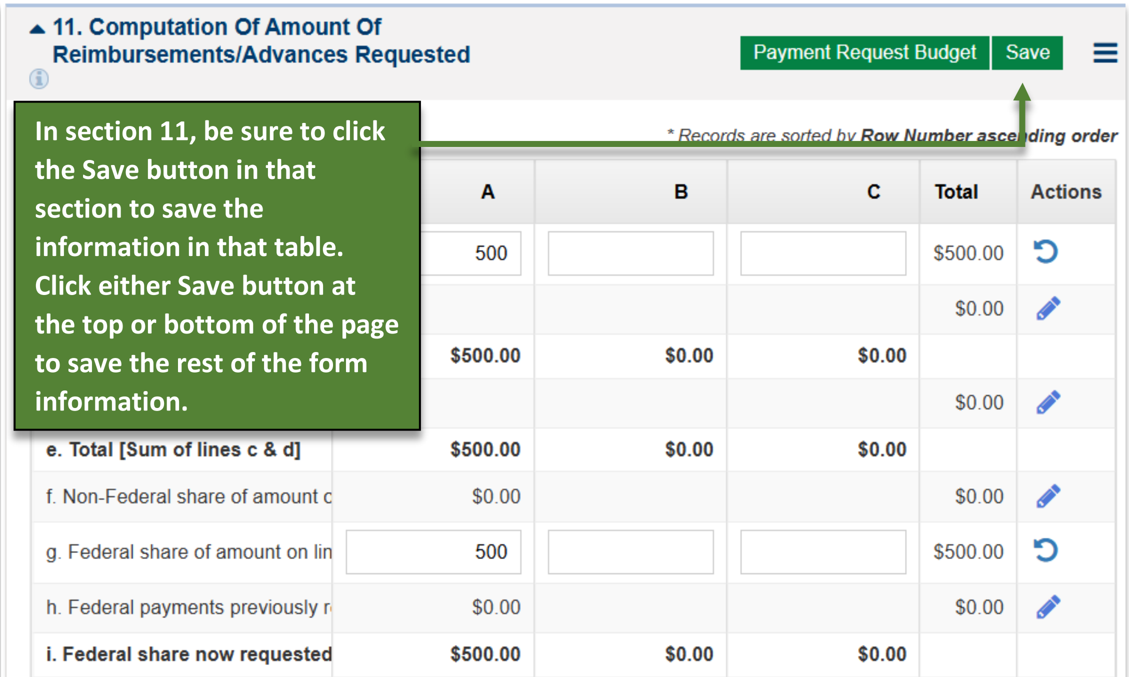
5. From the Reimbursement Payment Request record, enter your request amounts:
   a. Click the Financials tab and scroll to the Payment Request Budget section.
   b. Click the blue pencil icon ( ) to enter amounts into the relevant expense categories.
   c. Click the Save button in the Payment Request Budget section to save the information



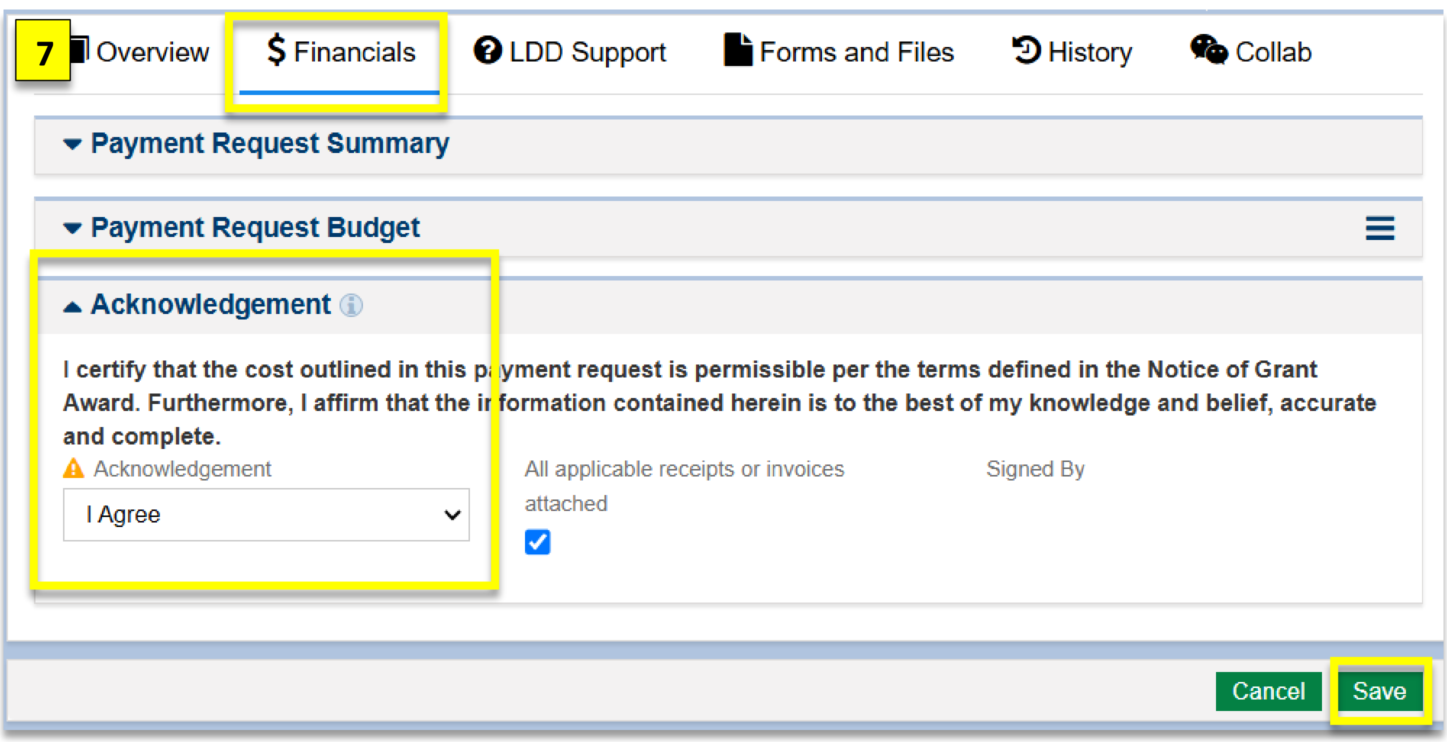
6. Fill out the SF-270 form
   a. Go to the Forms and Files tab
   b. Under the All Forms section, click the blue pencil icon in the Actions column



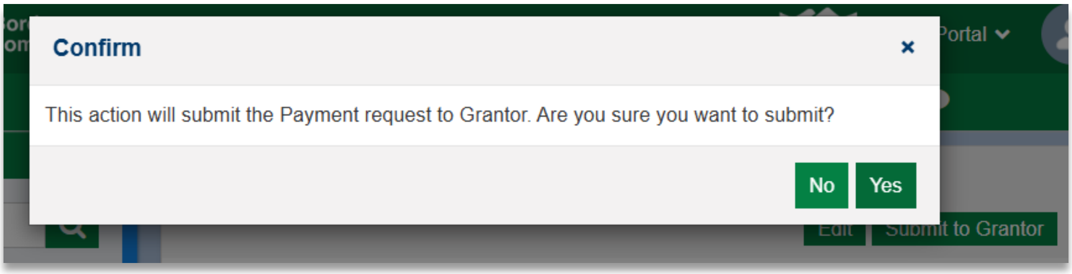
   c. Review and fill out relevant sections 1-13 and click Save. Click the Back button to return to the request record. Do not click the Validate button.



7. Complete the Acknowledgement
    a. Return to the Financials tab, scroll down to the Acknowledgement section
    b. You may need to click the Edit button at the top or bottom of the page
    c. Select “I Agree”, check “All applicable receipts or invoices attached” and click Save
        i. Note: You are not required to submit receipts or invoices unless NBRC requests them as part of a Desk Review



8. Click “Submit to Grantor” button at top of page. Click “Yes” when prompted by the pop-up confirmation window.



9. If NBRC asks you to revise your reimbursement request, you will receive a task to review and resubmit your request.

Note on Desk Reviews

NBRC will request that you provide supporting documentation for your first reimbursement request and at least one other time during the project's period of performance. **Upload any required documentation to the Forms and Files tab as <u>one (1)</u> combined PDF**.

7.4 Tracking the Status of Your Request

You can hover over the various sections of the status bar at the top of the reimbursement record to check on the status of your request.

- "Submitted for Approval": an NBRC staff member has conducted an initial review and forwarded the request for final approval
- "Approved": The request has received full NBRC approval
- "Paid": NBRC has forwarded the request to the payment processor. It can take 5-10 business days for funds to be deposited into the account.

8. Project Closeout (forthcoming)

Additional guidance forthcoming