



Grants eManagement System (GeMS)

Affiliate Grantee User Manual

Version 2.2

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Grants eManagement Systems (GeMS) System Requirements

GeMS is designed for use by the vast majority of computer users and should require little or no changes to their computer environment. The requirements that are mentioned below are common computer elements that should be present on most machines.

GeMS is designed for the two most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing GeMS from a Macintosh environment are required to have MacOS 7.5 or higher. Windows users are required to have an operating system that is Windows XP or higher.

GeMS is a website designed for access via the Internet. For purposes of accessing GeMS, minimum connection is by modem. For those using a modem, recommended connection speed is at least 33.6 kbps (kilobits per second). Internet connections "faster" than modem, i.e., cable, DSL, T1, wireless improve speed at which the system operates.

GeMS was designed to be compatible with common up-to-date web browsers including Internet Explorer V.7 and above, Firefox, Safari, Chrome and Opera.

All times in GeMS are in the Central Time Zone.

By default Internet Explorer 10 in Windows 8 does not run in compatibility mode. This is easily tested by logging into GeMS. If the compatibility mode is not enabled, the progress wheel in GeMS will simply spin without ever completing an action. To enable the compatibility mode for Internet Explorer 10, follow these steps (Windows 7 users start at step 2):

1. Windows 8 only - from the Windows 8 start screen select the Desktop.
2. From the Desktop launch Internet Explorer 10.
3. Press the Alt key on your keyboard to bring up the top menu.
4. Go to Tools | Compatibility View settings
5. Add <https://affiliategrants.komen.org/> to the Compatibility View websites, or Select Display all websites in Compatibility View.

Enabling the compatibility mode using either option in step 5 will affect all GeMS websites/pages.

GeMS has a combination of both Microsoft (MS) Word and PDF documents. Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. GeMS automatically generates grant documents in PDF format using information that is saved into various narrative and budget pages. Using Adobe Acrobat Reader can view, print, or save PDF documents. Adobe Acrobat Reader can be downloaded at www.adobe.com.

Microsoft Word increases GeMS formatting options and reduces the amount of empty space on printed pages. If MS Word is not installed, MS Word Viewer is available for download at www.microsoft.com.

GeMS Grantee User Roles

Welcome to GeMS! **In order to use the system you must first be granted access to it.**

There is **one basic way** to gain access to GeMS – through registering and creating an account. Prior to doing so, we recommend you take some time to think through what system roles are appropriate for the individuals in your organization. New GeMS users must register in a specific order, therefore all GeMS users from an organization should work together to determine GeMS roles and responsibilities. **The Project Director should register first.**

Project Director:

The role of Project Director should be assigned to the individual at a grantee/applicant organization that will serve as the project's lead contact for the purposes of grant management. This individual is responsible for validating all new users when they register for the system under their organization. This individual will have the highest level of access in the system and will be responsible for overseeing all administrative functions available, such as application and report creation and completion.

There can only be one Project Director per project/application.

Authorized Signer:

The role of Authorized Signer should be assigned to the individual(s) at an organization that has the authority to sign legal documents on behalf of the organization. This individual is responsible for electronically signing the application before submission and the grant contract, amendment requests, and reports if the organization is awarded funds.

There can be more than one Authorized Signer per organization. If an Authorized Signer is sometimes unavailable, it may be wise to have an additional individual with the role of Authorized Signer to serve as a backup during critical times (e.g. during application submission).

Viewer:

The role of viewer should be assigned to any individual at your organization who needs access to view the organization's information, but does not need the functionality to save, add, edit or change anything within the organization's information. There can be multiple viewers per organization.

Writer:

The role of writer should be assigned to any individual who needs access to an organization's application or report process to help complete the application or report but does not have the authority to complete the submission process. This individual cannot change the status of an application or report and will not have administrative function availability. There can be multiple writers per organization.

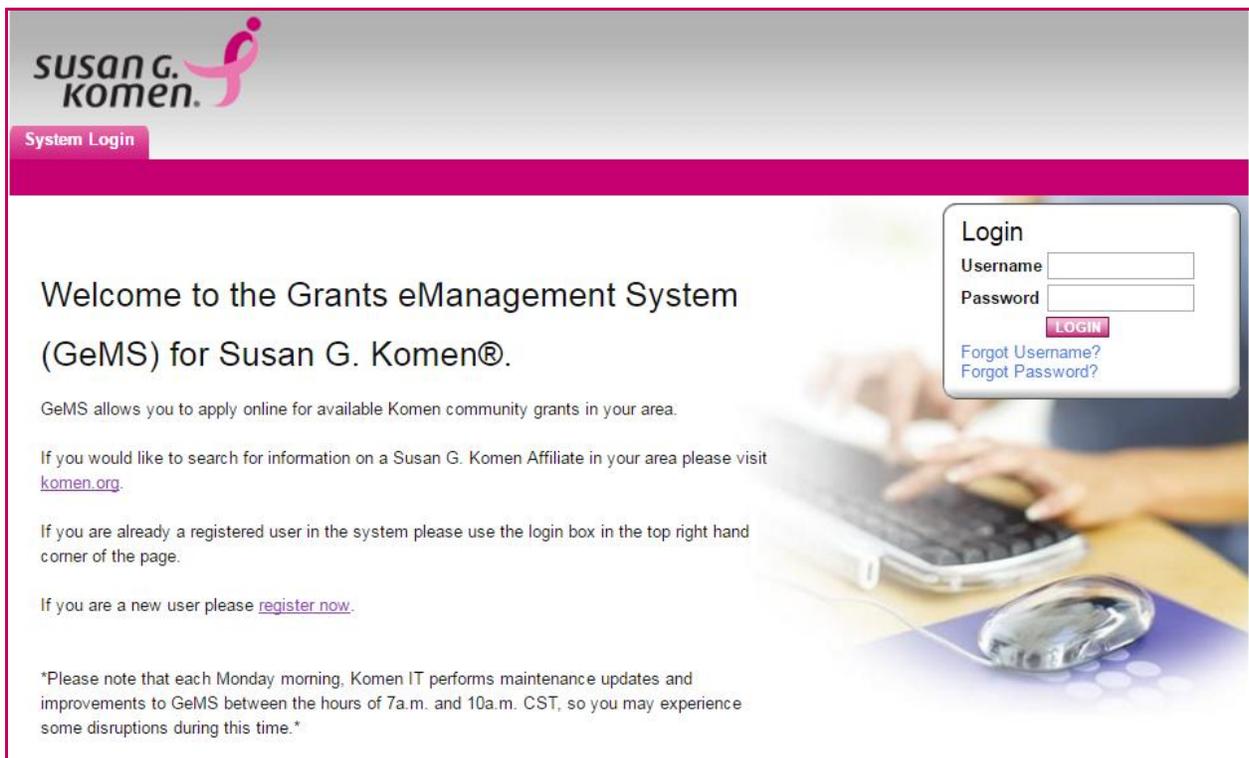
- The Project Director must be the first individual at an organization to register.
- The Project Director will then approve all subsequent users from their organization.
- The Authorized Signer should register and be validated/approved by the Project Director prior to the creation of the organization's first application.
- **An organization can have multiple Project Directors but only one Project Director per application** (this may be a need for large health systems and universities). The organization will need to use the "Add/Edit People" tool to ensure the Project Directors are attached to the correct application and reports.

GeMS Login and Registration

To access GeMS, type “<https://affiliategrants.komen.org>” into the address bar of your web browser and hit “**Enter**.”

Do not type “www.”

The page you see should look like the image shown below.

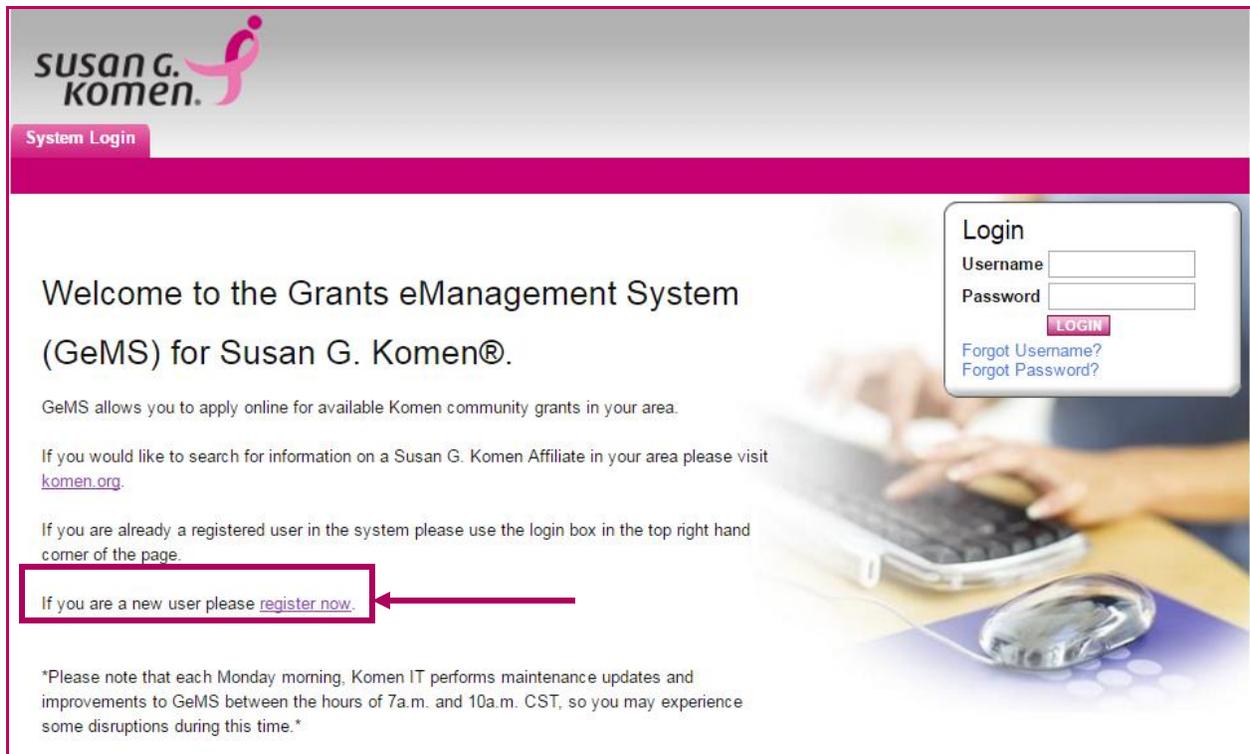


General GeMS Tip: ALWAYS follow the steps in order as they appear in the manual.

Creating a New Account

Registration for GeMS is the first step to the online grantmaking process. You can register at <https://affiliategrants.komen.org>.

- 1) From the GeMS homepage, click the “Register Now” link located towards the bottom of the homepage.



- 2) Complete the Registration form in its entirety. Once a user has created an account and has gained access to the system, they will never have to request access again.

There is no need for multiple accounts within GeMS, unless an applicant/grantee is applying to multiple Affiliates.

- a) Fill in all information as required. All items marked with an “*” are required to create your account.
- b) If a question has a pink “GO” button next to it when completing a question, you **MUST** select the “GO” button and wait approximately 5 seconds before advancing to the next question.

- c) Select the appropriate role for “What is your position at your Affiliate?” and click “GO.”
- Applicant
 - Grantee

Registration

Please complete all required fields below. Once you have completed the fields please select the save button to complete your registration. If there is a pink Go button next to a drop down list you must click the Go button before moving to the next question. Once you have registered you will receive a message at the top of the registration page letting you know that your registration is complete and you will receive an email informing you that your registration is complete. You will not be able to log into the system until you are approved. Once you are approved you will receive an email informing you that you have access to the system.

Contact Information

	Prefix	First	Middle	Last	Suffix
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>				
Email	<input type="text"/>				
Phone	<input type="text"/>				
What is your position at your Affiliate?	<input type="text" value="Applicant"/>				<input type="button" value="GO"/>
Affiliate State	<input type="text" value="Texas"/>				<input type="button" value="GO"/>
Affiliate	<input type="text"/>				<input type="button" value="GO"/>
Organization	<input type="text"/>				<input type="button" value="GO"/>
Username	<input type="text"/>				
Password	<input type="text"/>				
					Confirm Password <input type="text"/>

**Make Selection
and click GO**

- d) From the “Affiliate State” dropdown list, select the state in which the Affiliate is located and click “GO.”

Note: if the Affiliate serves multiple states – choose the state where the Affiliate main office is located. Check with the Affiliate if you are unsure.

[Back](#)

Registration

Please complete all required fields below. Once you have completed the fields please select the save button to complete your registration. If there is a pink Go button next to a drop down list you must click the Go button before moving to the next question. Once you have registered you will receive a message at the top of the registration page letting you know that your registration is complete and you will receive an email informing you that your registration is complete. You will not be able to log into the system until you are approved. Once you are approved you will receive an email informing you that you have access to the system.

Contact Information

	Middle	Last	Suffix
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>		
Email	<input type="text"/>		
Phone	<input type="text"/>		
What is your position at your Affiliate?	<input type="text" value="Applicant"/>		
Affiliate State	<div style="border: 1px solid #ccc; padding: 2px;"> <ul style="list-style-type: none"> Missouri Montana Nebraska Nevada New Hampshire New Jersey New Mexico New York North Carolina North Dakota Ohio Oklahoma Oregon Pennsylvania Puerto Rico Rhode Island South Carolina South Dakota Tennessee <li style="background-color: #e91e63; color: white;">Texas </div>		
Affiliate	<input type="text"/>		
Organization	<input type="text"/>		
Username	<input type="text"/>		
Password	<input type="text"/>		
			Confirm Password <input type="text"/>

**Select STATE
and click
GO**

e) From the “Affiliate” dropdown list, select the name of the Affiliate and click “GO.”

The screenshot shows a registration form with a dropdown menu for 'Affiliate' open. The menu lists various Komen affiliates, with 'Komen Headquarters' highlighted. A pink callout bubble with the text 'Select Affiliate and click GO' points to a pink 'GO' button located next to the dropdown menu.

f) From the “Organization Name” dropdown list, select your organization’s name and click “GO.”

Helpful Hint:

To guarantee the Project Director can locate user requests in the system, make sure you communicate in advance and know the exact name your organization is registered under in the system so you make the appropriate selection.

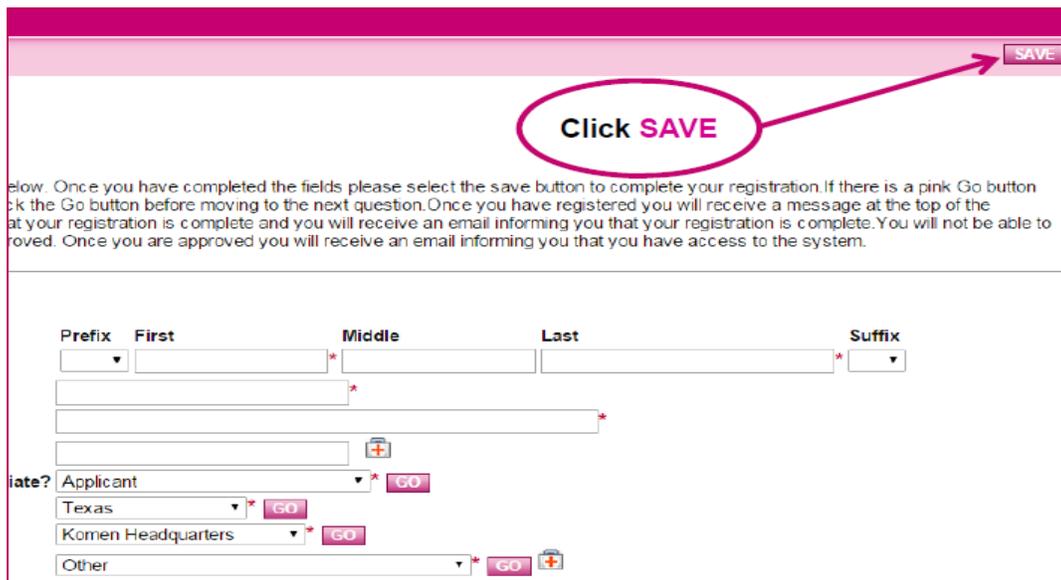
Do not select “Other,” as your organization already exists in the dropdown list if you are a grantee user.

The screenshot shows the registration form with the 'Organization' dropdown menu open. The menu lists 'Other', 'Community of Hope Inc.', 'Komen Headquarters', and 'Texas Tech University Health Sciences Center'. 'Community of Hope Inc.' is highlighted. A pink callout bubble with the text 'Select Organization Name and Click GO' points to a pink 'GO' button next to the dropdown menu.

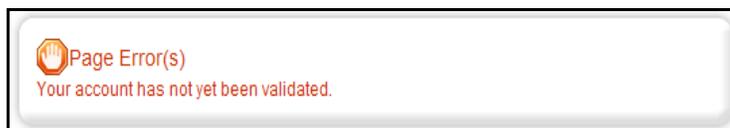
- g) The “Username” field must consist of all letters and numbers, minimum length 5 characters, maximum length 20 characters.
- h) The “Password” field must consist of all letters and numbers, minimum length 7 characters, maximum length 20 characters.
The password is case-sensitive.
- i) The fields “Password” and “Confirm Password” must be the same.

If you select “Other” even though your organization already exists in GeMS, the Project Director will not receive your registration for approval. If this happens, please contact your Komen Affiliate.

Once you have completed registration, select the pink “Save” button at the top of the page.



5. Having saved your contact information, your account must then be approved before you can access the system. If you attempt to access the system prior to getting approved/validated you will receive the following message:



User Approval Notification

You will receive an automatic email notification from the system when your registration has been submitted for approval and when access has been granted and your account has been validated.

While Project Directors are approved/validated by an Affiliate representative, all other users will be approved/validated by the organization’s Project Director. Project Directors should receive a notification of new user registrations within two minutes of the registration being submitted. *If more than an hour has passed since a user registered and the Project Director has still not been notified, please contact your Komen Affiliate.*

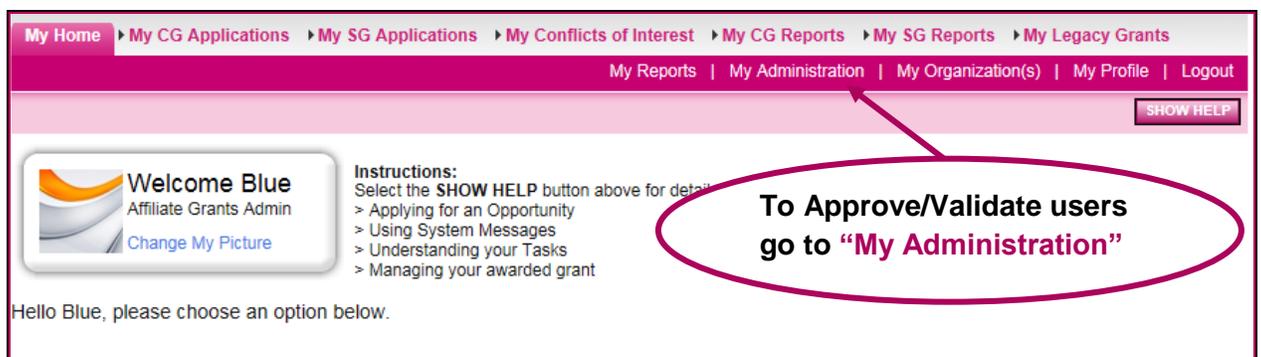
Validating Users

In order for all users within an organization to be approved/validated, the Project Director must follow the steps listed below along with the screen images.

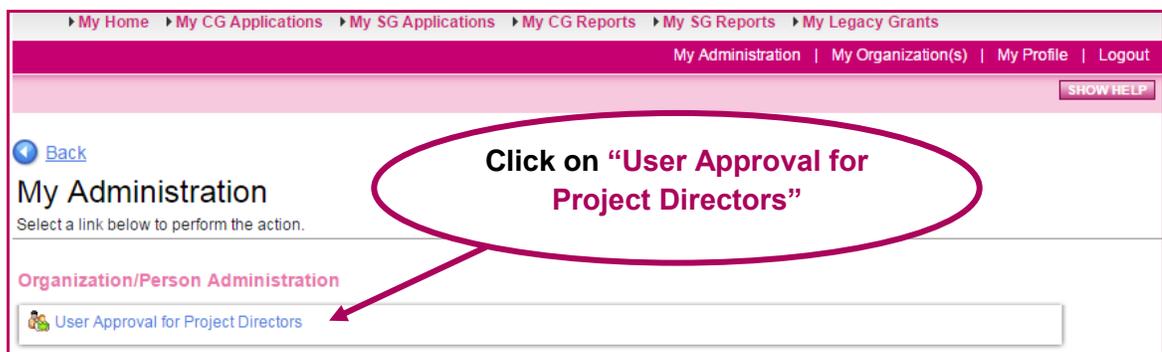
- 1) The **Project Director** will receive an automatic email when a user has registered under their organization and needs to be validated.

If a Project Director receives user notifications in error or if an individual has registered under an organization incorrectly, please contact your Komen Affiliate.

- 2) The **Project Director** logs in to GeMS and selects the “**My Administration**” tab at the top of the User Homepage.



- 3) Select the “**User Approval for Project Directors**” link within the “**My Administration**” section.



- 4) Once on the “Komen Project Director User Approval Page,” enter the new registrant’s name in the search criteria. You can also search the system for “New Users” in the “User Type” field to perform a broader search.
- 5) Select the pink “Search” button.

Komen User Approval
This page will allow administrative users to approve one or more users.

Search Criteria

Name

Organization

Organization City

Organization State

User Type

- 6) Scroll down to “Search Results.”
- 7) Select the checkbox next to the user’s name.
- 8) Select “Approval Type” to Approve User or Deny.
 - “Approve User” – user from an existing organization
 - “Deny” – users that should not be granted access to GeMS
- 9) Select your organization from the drop down menu.
- 10) Select a role for the user – “Authorized Signer,” “Writer” or “Viewer.”
- 11) The current date will appear in the “Active Date” field. You do not have to enter anything into the “Inactive Date” field unless you know the date you would like the user’s access to be inactivated.
- 12) Select the “Approve Selected User” button to complete the user’s validation/approval.

To approve the user select the record and click the button

Approval Type

Assign person's organization to

Set person's role to

Active Date

Inactive Date

#12 – final step - once all selections are made.

Search Results

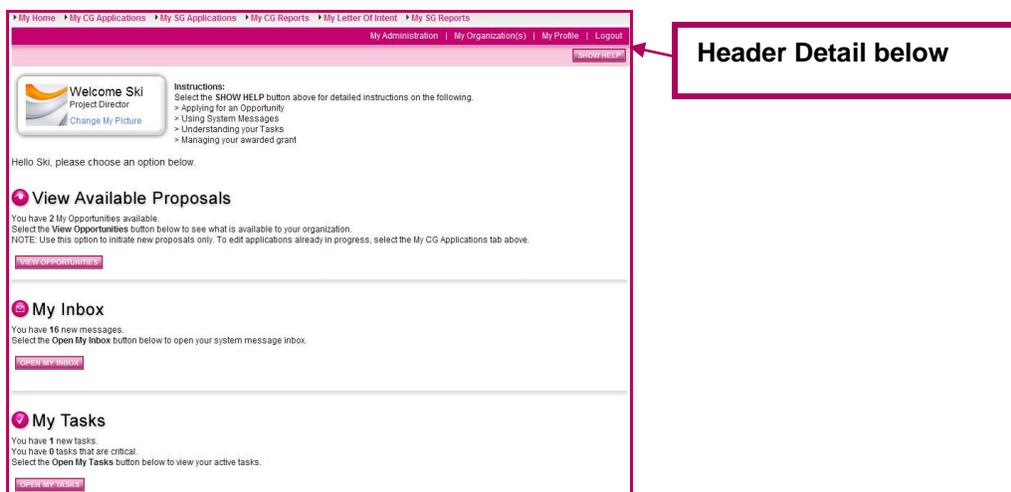
Export Results to Sort By ASC

<input type="checkbox"/>	Name	New Organization	Requested Organization / Title	Contact Info	Phones
<input checked="" type="checkbox"/>	Test, Test UserName: TestTest2015 Email: rschiesinger@komen.org Date Requested: 10/12/2015	False	Aspen Ski Lodge Title: Test	123 Main Street Aspen, CO 45654-5455 County: Hinsdale County	Phone 1: 6546546544 Fax: (555) 333-6666 Registration Phone: 555-555-5555

- 13) The new user will receive an automatic email notification telling them they have been approved in the system and can now access GeMS.

User Homepage

When a user logs into GeMS, they will land on the User Homepage. The content of the page and links across the top of the screen are described on the next page.



Header Detail:



User Tabs

- **My Home:** Brings the user back to their homepage
- **My CG Applications:** Access to all current and past community grant applications
- **My SG Applications:** Access to all current and past small grant applications, if applicable
- **My CG Reports:** Access to all current and past community grant progress and final reports
- **My SG Reports:** Access to all current and past small grant final reports, if applicable
- **My Legacy Grants:** Access to all grants funded to an organization prior to 2012
- **My Administration:** Administrator functions, user approval; this tab will only appear for authorized users
- **My Training Materials:** Link to GeMS User Manual
- **My Organization:** Current information about your organization (this information can be updated at any time by authorized users). **NOTE:** If the organization is awarded funding, the address on the My Organization page is where the grant check will be mailed.
- **My Profile:** Individual user information that can be updated at any time
 - This is where you can change your password
- **Logout:** Logout of the system
- **View Available Proposals:** Initiate a new grant application offered by the Affiliate
- **My Inbox:** System notifications regarding system users and application status
- **My Tasks:** List of current tasks you must complete

Automatic E-Mail Notifications

Automatic email notifications may be sent to you periodically throughout the grant year. These messages will be sent by the system according to an automatic process or as the result of a user-triggered event. These messages might be triggered by the submission of an application, an application being sent for modifications, or when a pending due date is approaching. These messages are intended to help you know what is occurring in the system that pertains to you or your organization. These messages may also be sent by Komen Affiliate personnel. These messages are designed to help keep you up to date with the progress of your application while also serving as reminders when action is required on your part.

In order to receive these messages it is important that you include an active, frequently used email address when creating your profile in the system. If you provide an incorrect email address or an address to an account that is either inactive or full, you will not be able to receive these important messages.

Helpful Hints:

- **Before you start typing on any page in GeMS, make sure a “Save” button is located in the upper right-hand corner.**
- If you do not see a “Save” button, then any additions or edits made will be lost. The presence of the “Save” button on an application page is dependent upon the status of the application and/or the role of the user. For example, if the status of the application is “Application Submitted,” no changes to the application can be made. Therefore, the “Save” button will not appear.
- Always hit “Save” to save your data. If you do not hit “Save” and you navigate away from the screen, your data will be lost.
- If you scroll over the first aid kits, help content will be available for that specific question.
- The system will log out after 45 minutes with no activity. If the system logs out automatically, the last data entered will not be saved if the save button was not selected prior to the log out.
- If you copy and paste text from Word, you must hit the backspace button within the text field for the character count to be shown.
- Print versions of the blank report and completed report are available within the “Access Management Tools” section of the report menu.
- Always use the browser’s “Back” button when trying to return to a previous page.

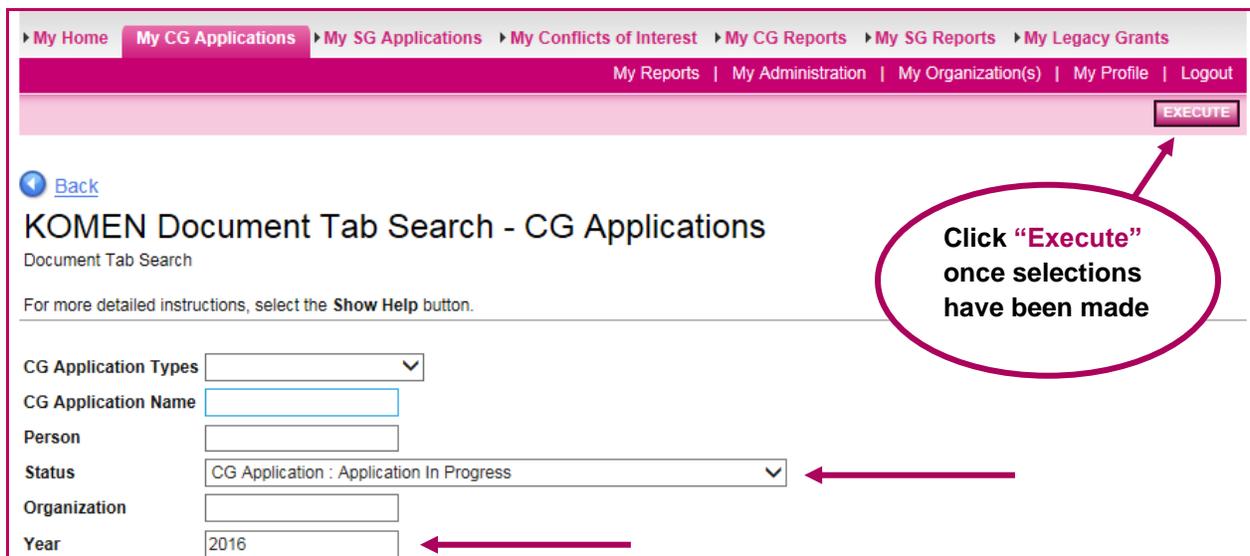
Accessing an Existing Application

- 1) User selects “My CG Applications.”

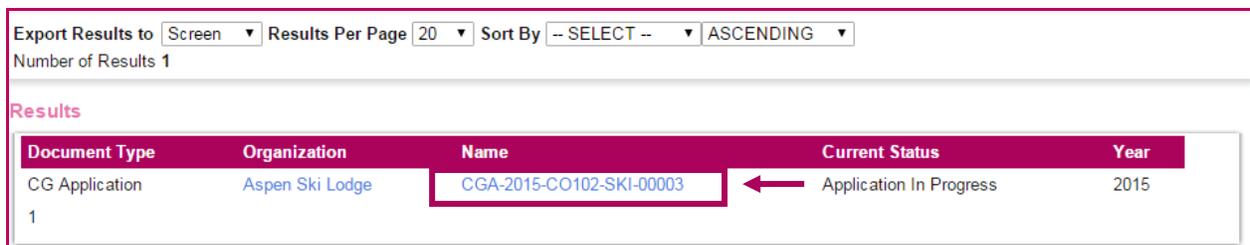


- 2) Search for the application via the various fields. We suggest using the “Status” field and selecting “CG Application: Application in Progress” from the dropdown list, and then for “Year” entering the grant year.

- 3) Click the “Execute” button towards the upper right corner of the page.



- 4) Select the name of the grant you would like to access for viewing/editing from the “Results” section. The application name will be a hyperlink in blue and start with CGA (Example: [CGA-2016-XXXXX-XXX-XXXXX](#)).



The CG Application Menu

The “CG Application Menu” is divided into various sections to help organize the application tasks and information. These sections are displayed and described below.

Helpful Hint:

The “CG Application Menu” is home base for the majority of forms and pages of the Grant Application. The “CG Application Menu” allows the applicant to access:

- All sections of the application, including project plan and budget summary
- Status change options (Project Director and Authorized Signer only)

CG Application Menu

Document Information: CGA(C)-2016-CO102-SKI-00001 ← Application Name

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	CG Application	Aspen Ski Lodge	Project Director	Contract Modifications Requested	04/01/2016 - 03/31/2017 11/23/2015 5:00PM EST

 **View, Edit and Complete Forms**

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

 **Change the Status**

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS

 **Access Management Tools**

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

VIEW MANAGEMENT TOOLS

 **Initiate / Access Reports**

Select the **Initiate/Access Reports** button below to initiate a new report or access an existing report.

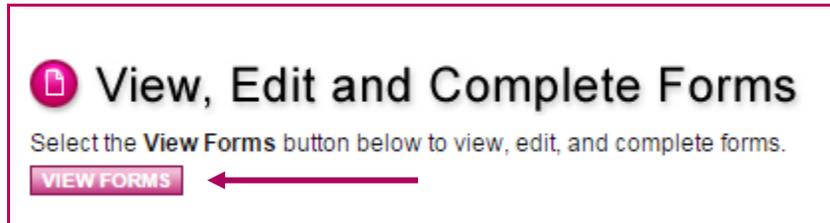
INITIATE/ACCESS REPORTS

The document information at the top of the page is the application’s unique system name (CGA-2016-XXXXX-XXX-XXXXX). This is how the application will be referenced within the system and within emails sent regarding the application.

This name cannot be changed.

View, Edit and Complete Forms

The Forms section contains all of the forms associated with your application. To view the application forms, simply click the “View Forms” button and then click on the name of the form you wish to view.

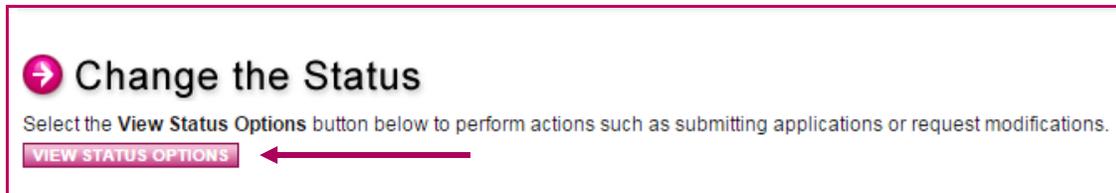


Application	
	Project Profile
	Organization Summary
	Project Priorities and Abstract
	Project Narrative
	Project Target Demographics
	Project Work Plan - Goal and Objectives (3)
	Project Work Plan Summary
	Key Personnel/Salaries
	Consultants/Sub-Contracts
	Supplies
	Travel
	Patient Care
	Other
	Indirect Cost
	Project Budget Summary

Change the Status

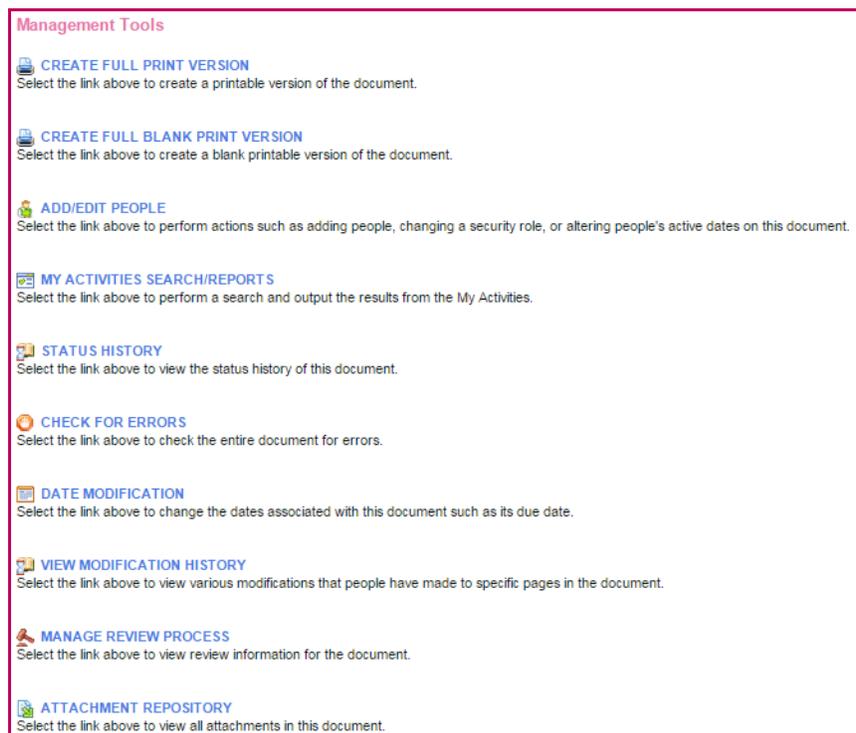
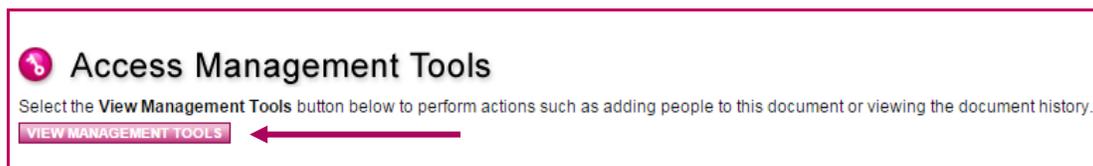
The “Change the Status” feature allows the Project Director and Authorized Signer to change the status of an application or report. **Status changes are ultimately how your organization will submit documents to the Affiliate.**

Status options are dependent on the current status of the document and the role of the user. When it is time to change the status of the application, click the “View Status Options” button. **Certain GeMS features may not be available until the application is in the appropriate status.**



Access Management Tools

The “Access Management Tools” section allows certain administrative responsibilities, such as the ability to add/edit people to the application, print the blank or completed application, and view the status history of the application. **Functionality is based on your user role.**



Add/Edit People

As new users are approved for access to the system, they will automatically be added to applications and reports that are initiated after their approval.

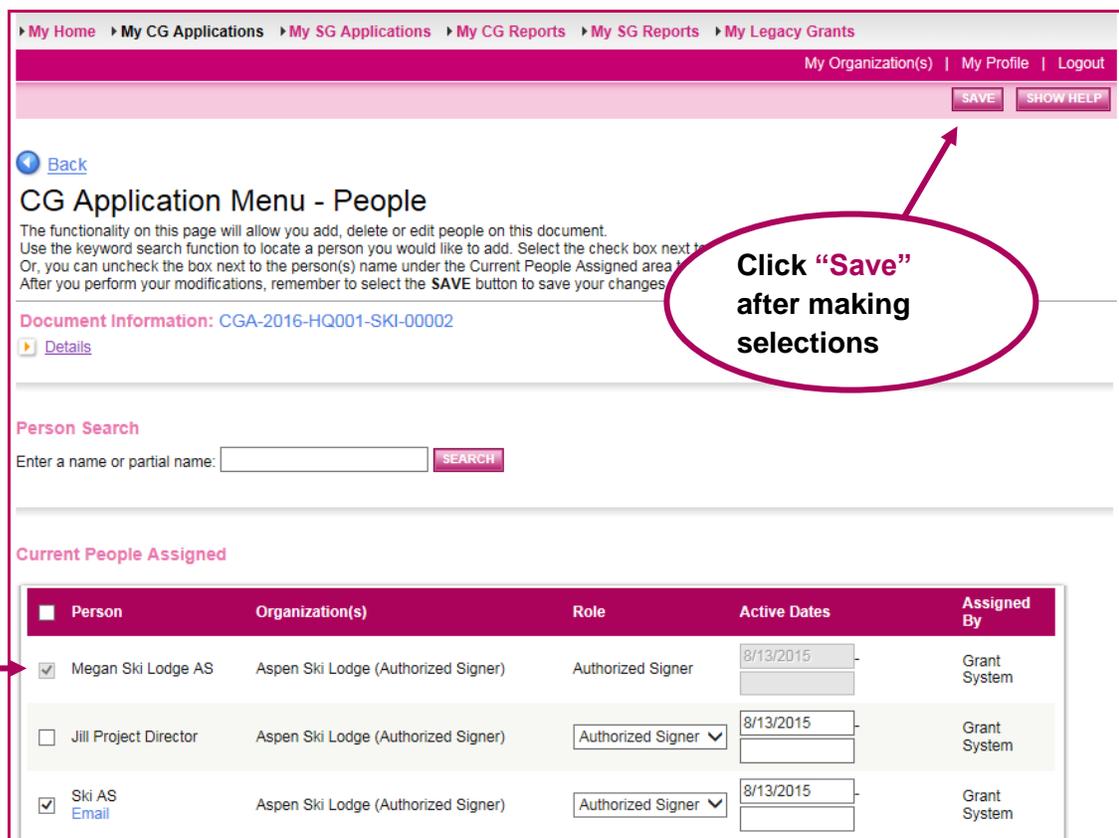
If for any reason, the Project Director needs to attach users to an application or report they can do this by using the “Add/Edit People” link under “Access Management Tools.”

1. Click on “Access Management Tools.”
2. Click “Add/Edit People.”

 **ADD/EDIT PEOPLE**
 Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

3. To grant a user access to an application, you simply check the box next to their name and click “Save” at the top of the page.

4. If for any reason you need to remove a user’s access to an application, you simply uncheck the box next to their name and click “Save.”



My Home ▶ My CG Applications ▶ My SG Applications ▶ My CG Reports ▶ My SG Reports ▶ My Legacy Grants

My Organization(s) | My Profile | Logout

SAVE SHOW HELP

Back

CG Application Menu - People

The functionality on this page will allow you add, delete or edit people on this document. Use the keyword search function to locate a person you would like to add. Select the check box next to the person(s) name under the Current People Assigned area. Or, you can uncheck the box next to the person(s) name under the Current People Assigned area. After you perform your modifications, remember to select the **SAVE** button to save your changes.

Document Information: CGA-2016-HQ001-SKI-00002
[Details](#)

Person Search
 Enter a name or partial name: SEARCH

Current People Assigned

Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/> Megan Ski Lodge AS	Aspen Ski Lodge (Authorized Signer)	Authorized Signer	8/13/2015	Grant System
<input type="checkbox"/> Jill Project Director	Aspen Ski Lodge (Authorized Signer)	Authorized Signer	8/13/2015	Grant System
<input checked="" type="checkbox"/> Ski AS Email	Aspen Ski Lodge (Authorized Signer)	Authorized Signer	8/13/2015	Grant System

Initiate/Access Reports (Progress & Final Reports)

The “Initiate/Access Reports” section is where you will find items related to an application or grant.



Once you click on “Initiate/Access Reports,” you will be directed to the following page.

Back

CG Application Menu - Related Items

The various sections below can link to items that are associated with this document.

Document Information: CGA-2016-HQ001-SKI-00003

[Details](#)

Related Documents

Sort search results by: Filter by Document Type:

Document Type	Name	Current Status	Period Date / Date Due	Created By	Last Modified By
CG Final Report	Initiate a/an CG Final Report 2016				
CG Progress Report	Initiate a/an CG Progress Report 2016				

Related Messages

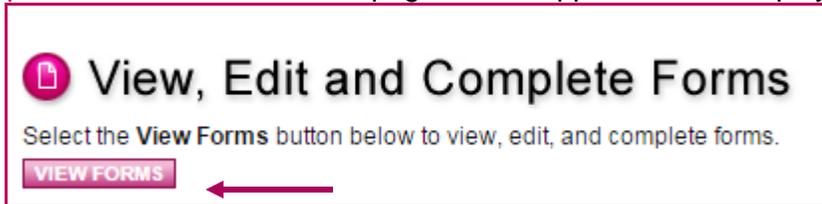
Sort search results by:

Only the *Project Director* will have access to initiate progress and final reports.

Click on the report name in blue to create a new report:
(ex. [Initiate a/an CG Progress Report 2016](#) or [Initiate a/an CG Final Report 2016](#))

Application Navigation

If you click on the “View Forms” button of the “View, Edit and Complete Forms” section on the “CG Application Menu,” the various pages of the application are displayed.



Forms Navigation

There are four basic methods for navigating through the forms of your application. You may either use:

1. ***Preferred Method*** Your browser’s back button will allow you to navigate back more easily than the GeMS “Back” button.
2. The “Back” link at the top of any page within the application.
3. The breadcrumb links after “You are here.”
4. The links listed in the “Navigation Links” section at the bottom of the page.

The image shown below is the “Back” link with the “You are here” breadcrumb trail below it. These two tools may be commonly used when navigating through the various pages of the application.



By clicking the “Back” button, you will be taken back to the Forms Menu and you can click on the next page you wish to complete.

You do not have to complete the pages of the application in any particular order.

To access a form, simply click on the page names below (ex. “Project Profile” or “Organization Summary”). After clicking on a specific page name, you can access the remaining pages by scrolling to “Navigation Links” at the bottom of the page.

Status	Page Name
	CG Application RFA Link to the RFA
Application	
	Project Profile
	Organization Summary
	Project Priorities and Abstract
	Project Narrative
	Project Target Demographics
	Project Work Plan - Goal and Objectives (3)
	Project Work Plan Summary
	Key Personnel/Salaries
	Consultants/Sub-Contracts
	Supplies
	Travel
	Patient Care
	Other
	Indirect Cost
	Project Budget Summary

Click on the name of the application page you would like to work on completing

NOTE: there is no action to take on the "Project Work Plan Summary Page." This is an automatic report that will populate based on your "Project Work Plan Goal & Objectives."

Forms Completion

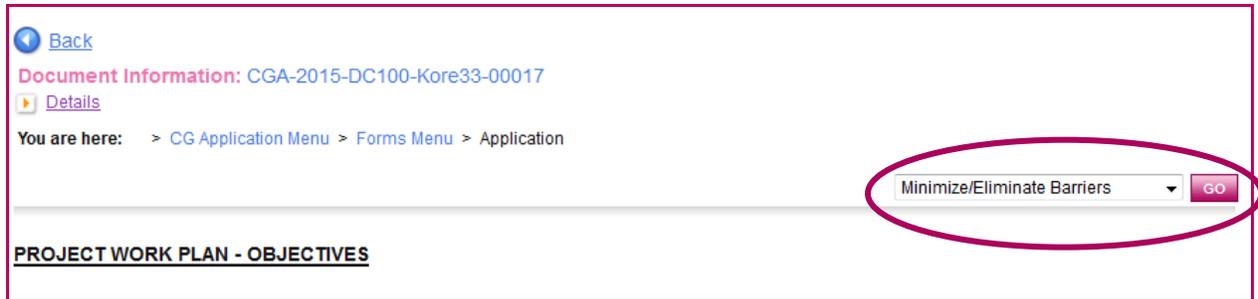
When filling out an application form, it is suggested you **first complete all of those fields for which you have information**. Not everyone in each organization will have all of the information necessary to complete each form. Complete as much of it as you can and then click the "Save" button. Fields followed by red asterisks (*) are required fields.

In the creation of some forms, the "Add" button is used to create additional fields so the applicant can list each item that falls under a particular category.

Project Work Plan - Objectives, for example, will typically consist of more than one item. Any form that has an "Add" button allows you to have multiple instances of that particular form. The following picture shows the available "Add" button on a page where multiple pages can be created.



When multiple pages have been created for a particular form, you can choose between them. A dropdown menu will appear on the far right of the button toolbar. Select the item and hit the “GO” button and it will take you to that item’s page.



When additional pages have been created, a number in parentheses will appear after the form name to indicate the number of pages connected with the particular link. Multipage forms will not display a “Created By” or “Last Modified By” name/date.



Automatic Calculations

When possible, **GeMS will automatically calculate totals for you.** Click the “Save” button to perform calculations – calculations will not occur until the “Save” button is selected. Please refer to the example below for details.

Name of Consultant	Agency Affiliation if Applicable	Hourly Rate	# of Hours	Total
Joe Smith	Test Affiliate	25	40	
John Doe	Test Affiliate	30	35	
Amy Joe		40	31	
				Totals:

Save has NOT been selected – no totals appear

Name of Consultant	Agency Affiliation if Applicable	Hourly Rate	# of Hours	Total
Joe Smith	Test Affiliate	\$25	40	\$1,000
John Doe	Test Affiliate	\$30	35	\$1,050
Amy Joe	Test Affiliate	\$40	31	\$1,240
				Totals: \$3,290

Save HAS been selected – totals appear

The “Budget Summary” page is another example of automatic calculations. When the Budget Summary is opened, the system will take the values you have entered in the Budget pages and display the information in the Budget Summary.

From Other Sources				
	Requested from Komen	Cash	In Kind	Total Required
Salaries and Fringe	\$11,075	<input type="text"/>	<input type="text"/>	\$11,075
Consultant Costs	\$3,290	<input type="text"/>	<input type="text"/>	\$3,290
Supplies	\$0	<input type="text"/>	<input type="text"/>	\$0
Travel	\$5,000	\$200	<input type="text"/>	\$5,200
Patient Care Costs				
Screening	\$735	<input type="text"/>	<input type="text"/>	\$735
Diagnostics	\$15,812	<input type="text"/>	<input type="text"/>	\$15,812
Treatment	\$1,558	<input type="text"/>	<input type="text"/>	\$1,558
Transportation	\$113	<input type="text"/>	<input type="text"/>	\$113
Subcontracts	\$6,715	<input type="text"/>	<input type="text"/>	\$6,715
Other	\$2,500	<input type="text"/>	<input type="text"/>	\$2,500
Subtotal – Direct Costs	\$46,798	\$200	\$0	\$46,998
Indirect Costs	\$0	<input type="text"/>	<input type="text"/>	\$0
Total:	\$46,798	\$200	\$0	\$46,998

Error Messages

If any required field is not completed within an application or report form an error message will be displayed in red across the top of the page immediately after the “Save” button is clicked. During form completion it is not necessary to correct errors right away. You may return to the form at a later time and fix errors. If for some reason any errors remain when you attempt to submit an application or report, you will receive an error message. **The GeMS system will require the errors be fixed before the application or report submission can be completed.** See the example below.

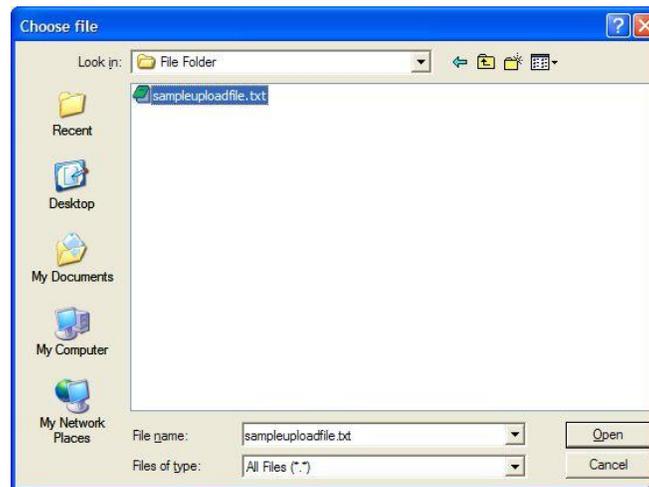


Uploads & Attachments

For some pages, form fields are not enough to capture the type of information that may be required. In those situations, a file upload field may be provided to allow you to upload a file instead. **Files of the following types are allowed as uploads: bmp, doc, docx, gif, jpg, pdf, png, ppt, tif, txt, wpd, xls and.xlsx.** To upload a file, click the “Browse” button. Uploads should be 15 megabytes or less.



Browse to the folder that contains the file you would like to upload and either double-click the file or click the file and then click the “Open” button.



After the page reloads, you must then click the page “Save” button to save the uploaded file.

PDF Version

In many pages, once the page is saved, a “Print Version” button will be available that will automatically create a PDF for you with the data you provided for each form. These dynamic PDFs can be printed or saved to your computer for reference.

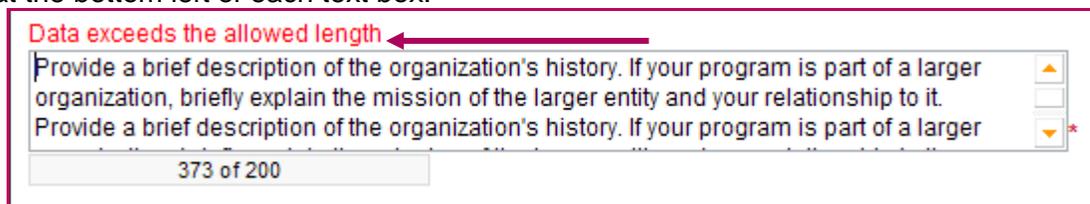


Copy and Paste

Grantees should be cautious when utilizing copy and paste. **We suggest you copy to NotePad first, then to GeMS.** Copying to Notepad will remove all formatting. If you copy in Microsoft Word and then paste into GeMS, the character count for the text box will not appear. Backspace at the end of what has been pasted in the text box to get the correct character count to appear.

Text Limits

Grantees must also be aware of the character limits of each text box, as attempting to copy and paste text larger than the allotted amount of space will yield an error. The character limit may be found at the bottom left of each text box.



Helpful Tip: If character count has exceeded the allowed length, **do not exit the document until you have edited it down** to the allowed character limit. Otherwise, all entered data will be lost.

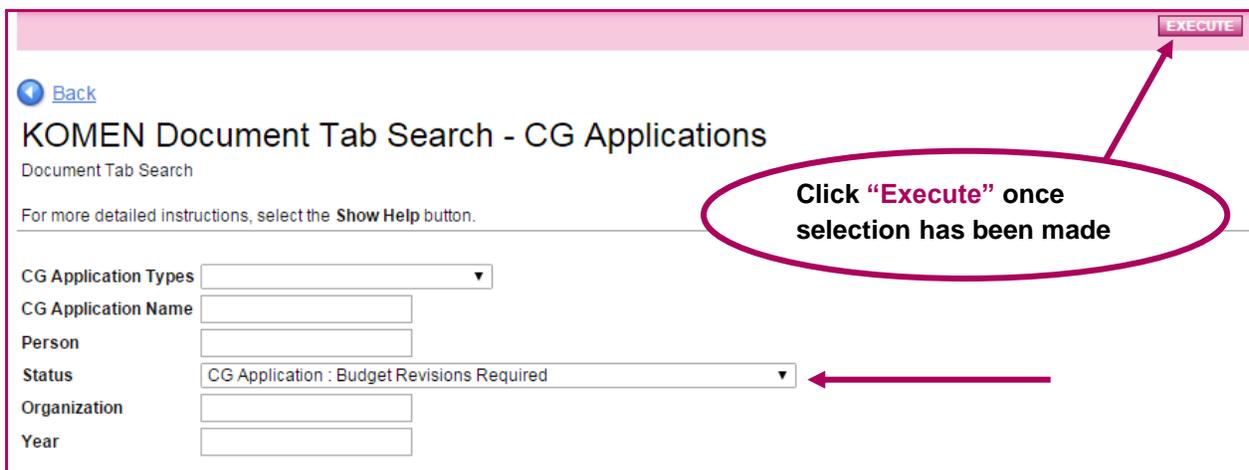
Budget Revisions Required

If the organization is required to make revisions to the application before final funding can be approved, the applicant will follow these steps:

- 1) From the “User Homepage,” click the “My CG Applications” tab at the top of the page.



- 2) Search for all applications in the status “Budget Revisions Required” and click **Execute**.



- 3) Select the application name for the project in which revisions are required.

Results

Document Type	Organization	Name	Current Status	Year
CG Application	Aspen Ski Lodge	CGA-2016-HQ001-SKI-00003	Budget Revisions Required	2016
1				

- From the “CG Application Menu,” select the “View Forms” button in the “View, Edit and Complete Forms” section.

CG Application Menu

Document Information: CGA(C)-2016-CO102-SKI-00001

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	CG Application	Aspen Ski Lodge	Project Director	Contract Modifications Requested	04/01/2016 - 03/31/2017 11/23/2015 5:00PM EST

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

VIEW MANAGEMENT TOOLS

Initiate / Access Reports

Select the **Initiate/Access Reports** button below to initiate a new report or access an existing report.

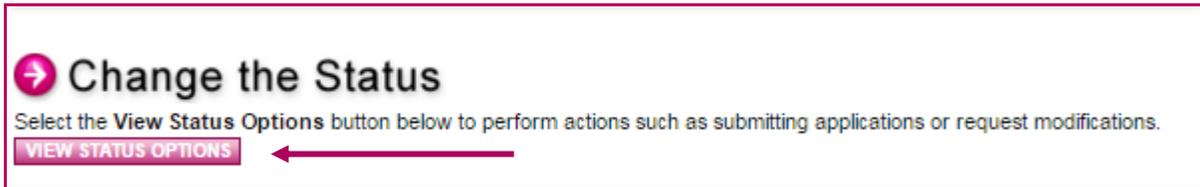
INITIATE/ACCESS REPORTS

- Review and update each form that the Affiliate has requested revisions to.

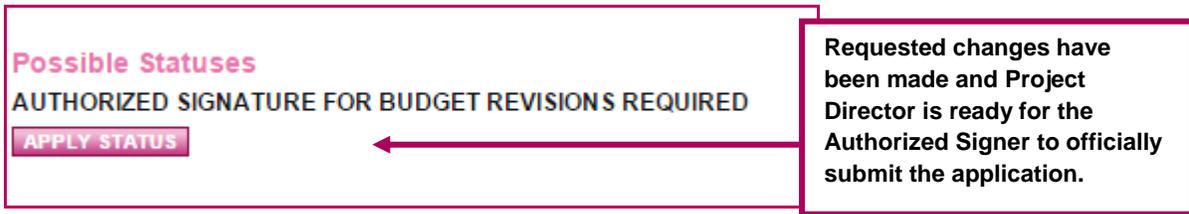
Forms

Status	Page Name	Note	Created By	Last Modified By
	CG Application RFA			
Application				
	Project Profile		Grant System 11/2/2015 3:17:35 PM	
	Organization Summary			
	Project Priorities and Abstract			
	Project Narrative			
	Project Target Demographics			

- Once all revisions are complete, return to the “CG Application Menu” and select the “View Status Options” button in the “Change the Status” section.



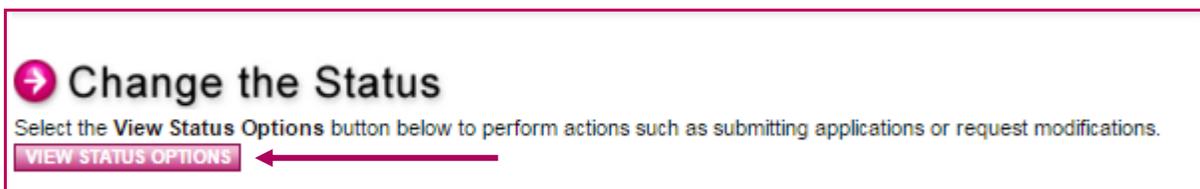
- Select the “Apply Status” button under the appropriate status.



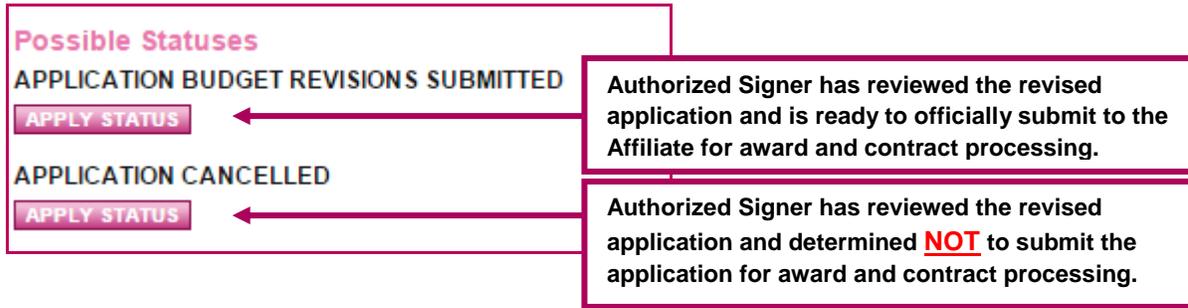
- The **Authorized Signer** logs in to GeMS and clicks “Open My Tasks” button in My Tasks section.
- Select the name of the application you would like to submit from the My Task list.

Document Type	Organization	Name	Current Status	Year
CG Application	Aspen Ski Lodge	CGA-2016-HQ001-SKI-00003	Authorized Signature for Budget Revisions Required	2016
1				

- From the “CG Application Menu,” click the “View Status Options” button in the “Change the Status” section.



11) Click “Apply Status” under the appropriate status.



12) The Affiliate will now review the edits and if the changes are accepted, the Affiliate will begin the contract process. If further modifications are needed, the Affiliate will restart the process by changing the status back to “Budget Revisions Required.”

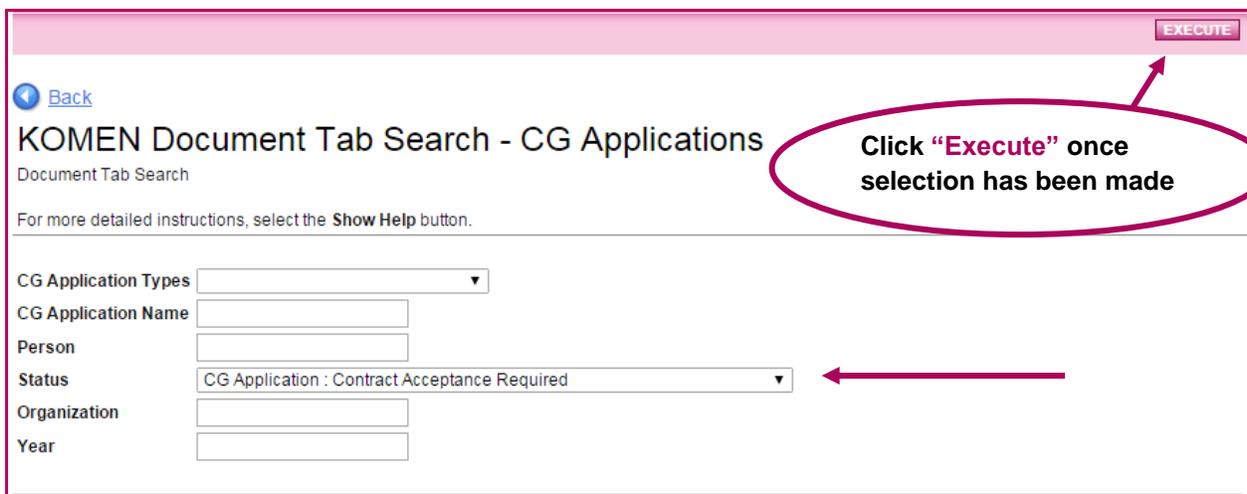
Contract Acceptance

The Authorized Signer is the only system user permitted to accept the contract for an organization’s application. In order to accept the contract, follow these steps:

- 1) From the User Homepage, click the “My CG Applications” tab at the top of the page.



- 2) Search for all applications in the status “Contract Acceptance Required” and click “Execute.”



- 3) Select the application name of the project for which the contract is being reviewed.

Results

Document Type	Organization	Name	Current Status	Year
CG Application	Aspen Ski Lodge	CGA-2016-HQ001-SKI-00003	Contract Acceptance Required	2016
1				

- 4) From the “CG Application Menu,” select the “View Forms” button in the “View, Edit and Complete Forms” section.

CG Application Menu

Document Information: CGA-2017-HQ001-SKI-00010

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	CG Application	Aspen Ski Lodge	Project Director	Application In Progress	05/04/2016 - 03/31/2018 N/A

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS ←

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

VIEW MANAGEMENT TOOLS

Initiate / Access Reports

Select the **Initiate/Access Reports** button below to initiate a new report or access an existing report.

INITIATE/ACCESS REPORTS

- 5) Scroll down and select “Contract Acceptance” from the application page list.

Contract

[Contract Acceptance](#) ←

- 6) The **Authorized Signer** should review the contract in its entirety. If you **AGREE** to the terms and conditions, the Authorized Signer will then:
 - a) Upload the organization’s Certificate of Insurance showing evidence of the levels of coverage required by the RFA and naming Komen as both additional insured and certificate holder.
 - b) Upload a current W9.

Authorized Signatory Contact Information

Name Jill Project Director
Title Authorized Signer
Phone # (654) 654-6544
Email

Please Upload Insurance Certification and W9

Insurance Certification No file chosen ←
W9 No file chosen ←

If you do **DO NOT AGREE** to the terms of the contract, please skip to page 34 for further instructions.

- 7) The contract must be accepted by clicking the box next to the appropriate statement.

Check the **I Agree** box to confirm acceptance of the terms and conditions of the Grant Agreement and any letters of clarification listed above. By checking the I Agree box, you hereby affirm that you are authorized to agree to the terms and conditions of the Grant Agreement and all letters of clarification listed above on behalf of the Grantee. Your agreement will act as an electronic signature to the documents listed above and will be considered valid and binding.

I Agree ←

Check the **I Decline** box if you do not accept the terms and conditions of the Grant Agreement and/or letter of clarification (as applicable). By checking the I Decline box, you hereby affirm that you are authorized to decline this Grant Agreement and/or letter of clarification on behalf of the Grantee. If you decline, you will be given the opportunity to request revisions to the Grant Agreement or letter of clarification (as applicable). Requested revisions are subject to Komen’s sole discretion and will not be automatically accepted.

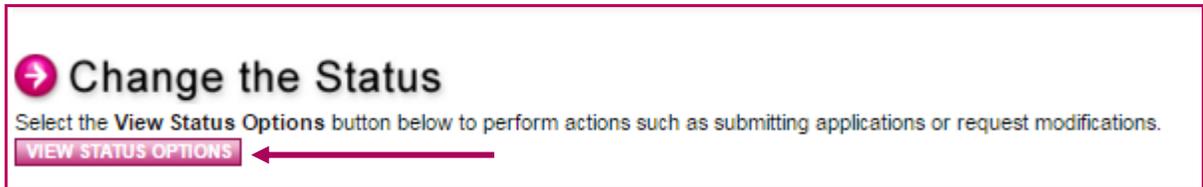
I Decline

- 8) Click “**Save**” at the top of the page.

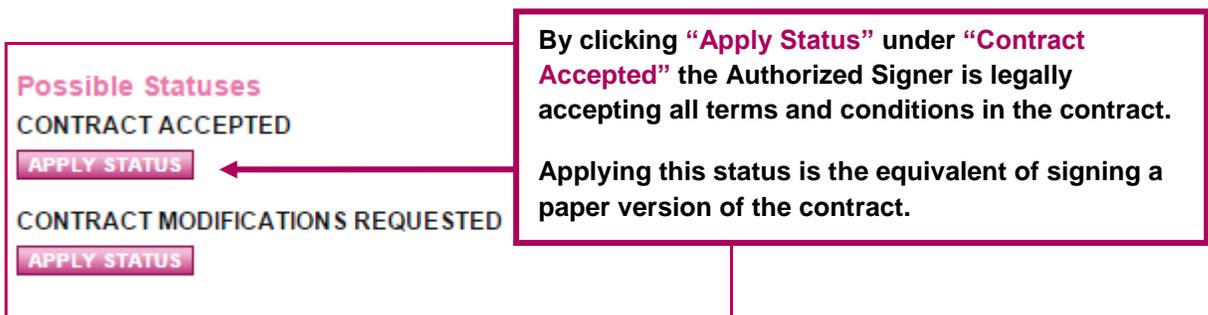
My Administration | My Organization(s) | My Profile | Logout

You **must attach** a W9 and Certificate of Insurance and Click “I Agree” in order to save the page. If you have not followed all of the steps listed above, an error message will appear and you will not be able to progress through the process.

- 9) If the contract is accepted, return to the “CG Application Menu” and select the “View Status Options” button in the “Change the Status” section.



- 10) Select the “Apply Status” button under Contract Acceptance.



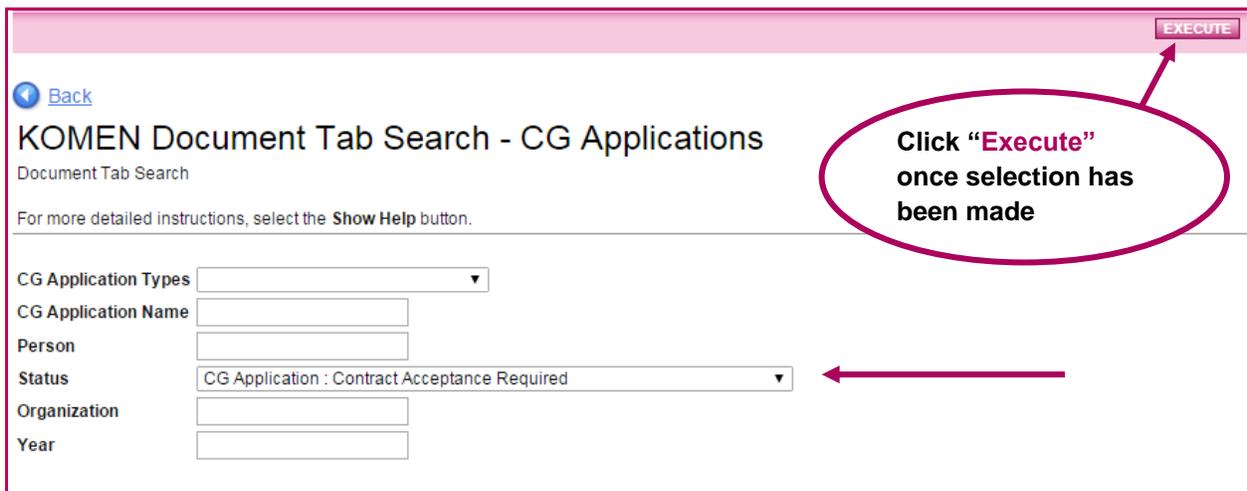
Declining the Contract/Requesting Contract Modifications

The Authorized Signer is the only system user permitted to decline the contract for an organization’s application. In order to decline the contract, follow these steps:

- 1) From the “User Homepage”, click the “My CG Applications” tab at the top of the page.



- 2) Search for all applications in the status “Contract Acceptance Required” and click “Execute.”



- 3) Select the “Name” of the application for which the contract is being reviewed.

Results

Document Type	Organization	Name	Current Status	Year
CG Application	Aspen Ski Lodge	CGA-2016-HQ001-SKI-00003	Contract Acceptance Required	2016
1				

A red arrow points to the 'Name' column of the first row in the table.

- From the “CG Application Menu,” select the “View Forms” button in the “View, Edit and Complete Forms” section.

CG Application Menu

Document Information: CGA-2017-HQ001-SKI-00010

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	CG Application	Aspen Ski Lodge	Project Director	Application In Progress	05/04/2016 - 03/31/2018 N/A

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS ←

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

VIEW MANAGEMENT TOOLS

Initiate / Access Reports

Select the **Initiate/Access Reports** button below to initiate a new report or access an existing report.

INITIATE/ACCESS REPORTS

- Scroll down and select “Contract Acceptance” from the application page list.

Contract
 Contract Acceptance ←

- The Authorized Signer should review the contract in its entirety. If you **DO NOT AGREE** to the terms and conditions you will then decline by clicking the box next to the appropriate statement, then click “Save” at the top of the page.

Check the **I Agree** box to confirm acceptance of the terms and conditions of the Grant Agreement and any letters of clarification listed above. By checking the I Agree box, you hereby affirm that you are authorized to agree to the terms and conditions of the Grant Agreement and all letters of clarification listed above on behalf of the Grantee. Your agreement will act as an electronic signature to the documents listed above and will be considered valid and binding.

I Agree

Check the **I Decline** box if you do not accept the terms and conditions of the Grant Agreement and/or letter of clarification (as applicable). By checking the I Decline box, you hereby affirm that you are authorized to decline this Grant Agreement and/or letter of clarification on behalf of the Grantee. If you decline, you will be given the opportunity to request revisions to the Grant Agreement or letter of clarification (as applicable). Requested revisions are subject to Komen's sole discretion and will not be automatically accepted.

I Decline ←

- 7) If the contract is declined, return to the “CG Application Menu” and select the “View Status Options” button in the “Change the Status” section.

→ Change the Status

Select the View Status Options button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS ←

- 8) Select “Apply Status” under “Contract Modifications Requested.”

Possible Statuses

CONTRACT ACCEPTED

APPLY STATUS

CONTRACT MODIFICATIONS REQUESTED

APPLY STATUS ←

Grantee does not agree to the terms of the original language in the contract and would like to request modifications.

- 9) Once the Authorized Signer has changed the status to “Contract Modifications Requested,” a new form “Contract Modification Request” will appear.

Contract	
	Contract Acceptance
	Contract Modification Request ←

Either the Project Director or Authorized Signer can now make changes to the “Contract Modification Request” form.

- 10) The Project Director or Authorized Signer should complete the “Contract Modification Request” form and provide reasoning that the current language in the grant agreement is not acceptable and propose amended language for the Affiliate to consider and click “Save.”

Back
 Document Information: CGA-2016-HQ001-SKI-00003
 Details
 You are here: > CG Application Menu > Forms Menu

CONTRACT MODIFICATION REQUEST

Please complete the following page to request a modification of the terms and conditions of the grant agreement for review by an Affiliate representative.

Your organization does not accept the terms and conditions of the current grant agreement. Please complete the information below to propose new language that will be reviewed by an Affiliate representative.

As part of your modification request, in the appropriate text box(es) below, please :
 1. Include the reason(s) that the current language in the grant agreement is not acceptable.
 2. Propose amended language for consideration.

1) Restrictions of the Use of Grant Funds

Enter reason(s) that current language is unacceptable and proposed amended language, in applicable sections.

0 of 3500

2) Collaborating Organizations

Enter reason(s) that current language is unacceptable and proposed amended language, in applicable sections.

0 of 3500

3) Acknowledgments; Komen Intellectual Property; Permission to Use Grantee Name and Logo

Enter reason(s) that current language is unacceptable and proposed amended language, in applicable sections.

11) Once the “Contract Modification Request” has been completed and Saved, the **Authorized Signer** must return to the “CG Application Menu” and select “View Status Options” under “Change the Status.”

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS

12) Select “Apply Status” under “Contract Modifications Submitted.”

Possible Statuses

CONTRACT MODIFICATIONS SUBMITTED

APPLY STATUS

The Affiliate will now review the proposed modification request(s) and accept the changes as proposed or the Affiliate will propose their own revised language. Once the Affiliate has made their determination, they will change the status to **“Contract Acceptance Required.”**

- 13) Once the Authorized Signer has been notified that the application is again in the status of **“Contract Acceptance Required,”** return to the **“CG Application Menu.”** Select the **“View Forms”** button in the **“View, Edit and Complete Forms”** section.

CG Application Menu

Document Information: CGA-2016-HQ001-SKI-00003

Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	CG Application	Aspen Ski Lodge	Authorized Signer	Contract Modifications Submitted	N/A - N/A N/A

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

- 14) Select the **“Contract Acceptance”** page from the Forms menu.

Contract

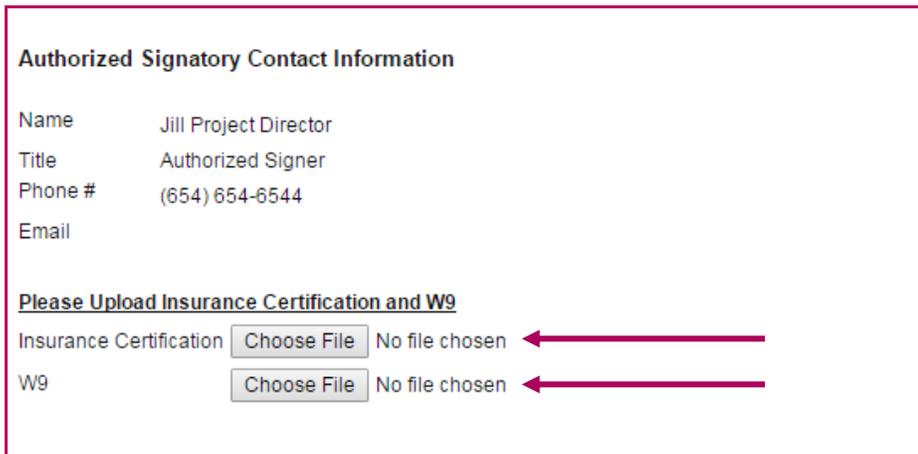
- [Contract Acceptance](#)
- [Contract Modification Request](#)

- 15) There will now be a **“Letter of Clarification”** available as an attachment to the initial contract. Review the contract including the **“Letter of Clarification.”**

Letter of Clarification DELETE

The Authorized Signer should review the contract and Letter of Clarification in its entirety. If you **AGREE** to the terms and conditions, the Authorized Signer will then:

- a) Upload the organization’s Certificate of Insurance showing evidence of the levels of coverage required by the RFA and naming Komen as both additional insured and certificate holder. (If this has not been completed already.)
- b) Upload a current W9. (If this has not been completed already.)



Authorized Signatory Contact Information

Name Jill Project Director
Title Authorized Signer
Phone # (654) 654-6544
Email

Please Upload Insurance Certification and W9

Insurance Certification No file chosen ←

W9 No file chosen ←

16) The contract must be accepted or declined by clicking the box next to the appropriate statement.



Check the **I Agree** box to confirm acceptance of the terms and conditions of the Grant Agreement and any letters of clarification listed above. By checking the I Agree box, you hereby affirm that you are authorized to agree to the terms and conditions of the Grant Agreement and all letters of clarification listed above on behalf of the Grantee. Your agreement will act as an electronic signature to the documents listed above and will be considered valid and binding.

I Agree ←

Check the **I Decline** box if you do not accept the terms and conditions of the Grant Agreement and/or letter of clarification (as applicable). By checking the I Decline box, you hereby affirm that you are authorized to decline this Grant Agreement and/or letter of clarification on behalf of the Grantee. If you decline, you will be given the opportunity to request revisions to the Grant Agreement or letter of clarification (as applicable). Requested revisions are subject to Komen’s sole discretion and will not be automatically accepted.

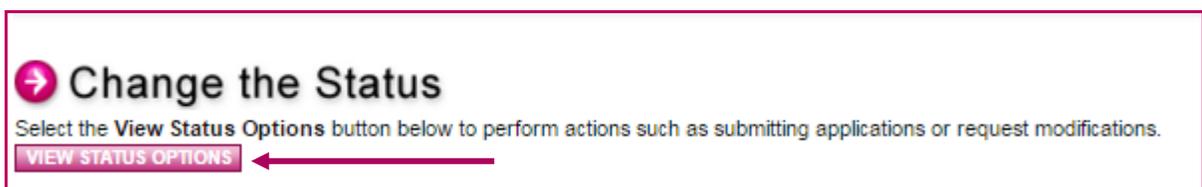
I Decline

17) Click “Save” at the top of the page.



My Administration | My Organization(s) | My Profile | Logout

18) If the contract is accepted, return to the “CG Application Menu” and select the “View Status Options” button in the “Change the Status” section.

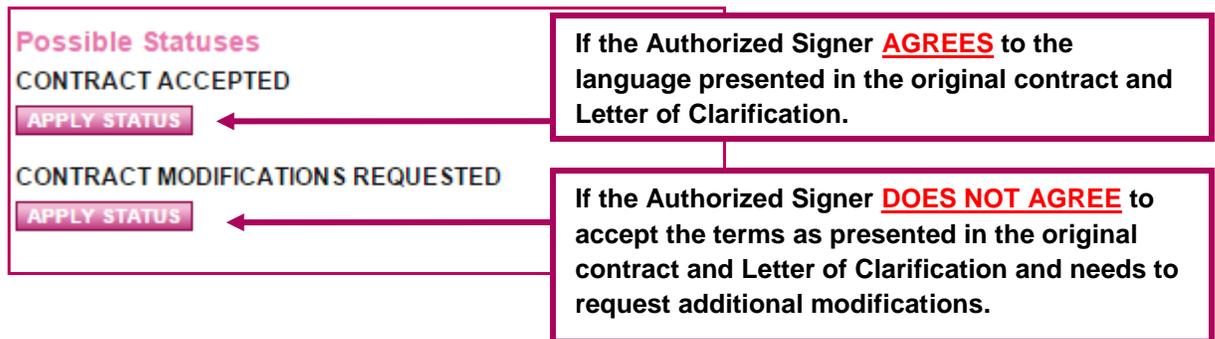


Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

←

19) Select the “Apply Status” button under the appropriate status.



If the Authorized Signer **DOES NOT AGREE** and wishes to request additional modifications to the terms in the initial contract and **Letter of Clarification**, they will:

- Select “I Decline” at the bottom of the contract.
 - Select “Save.”
- 1) Return to the “CG Application Menu” and select “View Status Options” under “Change the Status.”
 - 2) Select “Apply Status” under “Contract Modifications Requested.”
 - 3) Repeat steps beginning at #9 on the previous pages to submit additional requested changes to the Affiliate for review until the contract is accepted by both parties.

Progress and Final Reports

Report Creation

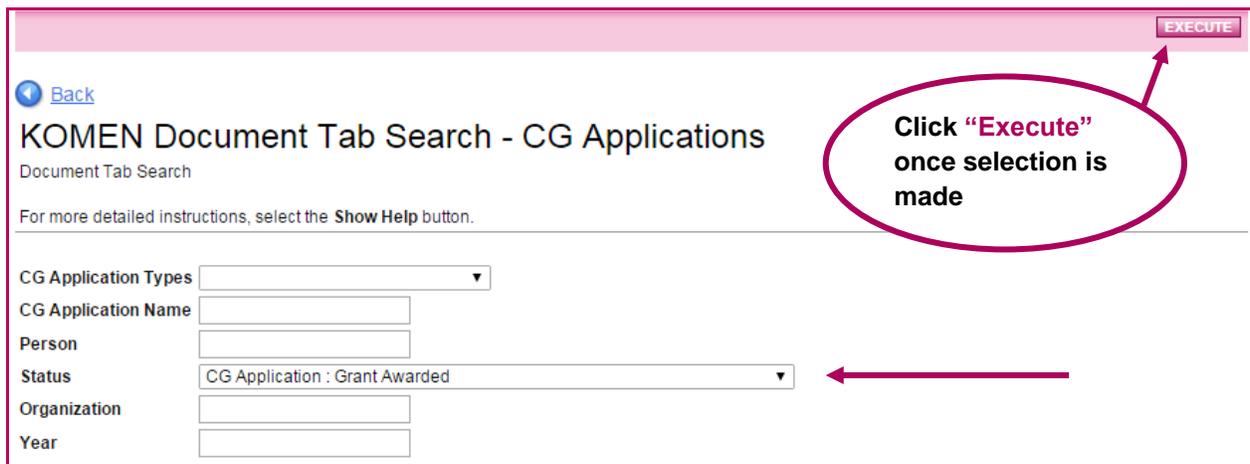
The Project Director is the only user who is permitted to initiate progress and final reports for an organization’s application.

In order to create the progress and final report, the Project Director must follow these steps.

- 1) From the **User Homepage**, click the “My CG Applications” tab at the top of the page.



- 2) Search for all applications in the status “Grant Awarded” and click “Execute.”



- 3) Select the application name for the project for which the progress or final report will be created.

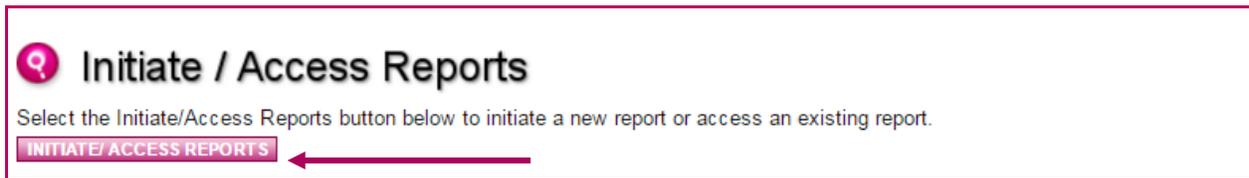
Results

Document Type	Organization	Name	Current Status	Year
CG Application	Aspen Ski Lodge	CGA-2015-CO102-SKI-00001	Grant Awarded	2015
CG Application	Aspen Ski Lodge	CGA-2016-HQ001-SKI-00002	Grant Awarded	2016
CG Application	Aspen Ski Lodge	CGA-2016-CO101-SKI-00001	Grant Awarded	2016
CG Application	Aspen Ski Lodge	CGA-2016-HQ001-SKI-00003	Grant Awarded	2016

1

Helpful Hint: If you are having difficulty initiating a report, ensure that the current status is “Grant Awarded.” Contact the Affiliate for assistance if needed.

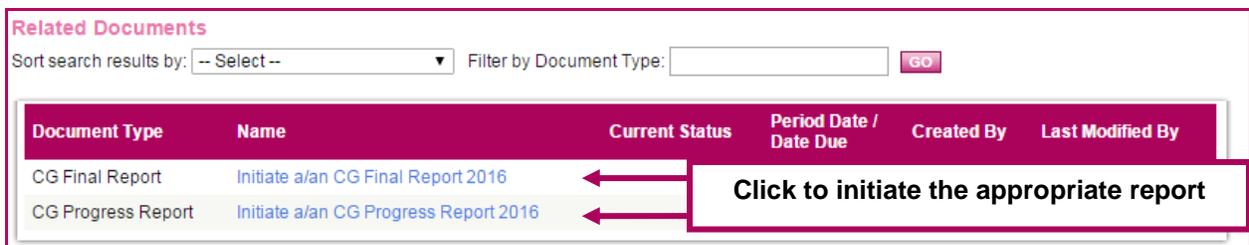
- From the “CG Application Menu,” select “Initiate/Access Reports” below “Initiate/Access Reports.”



- Select the name of the report you would like to create.

Progress Reports are submitted during the grant cycle, depending on the timeline determined by the Affiliate.

Final Reports are submitted after the completion of the award period.

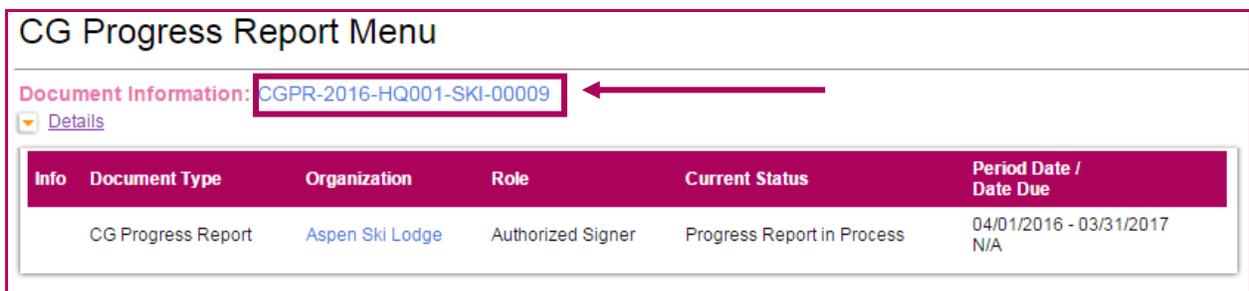


- Select “I Agree” to continue the creation of the report.



- The CG Progress Report Menu will automatically open.

It is important to note the new Progress or Final Report Document Identifier to reference when returning to the report. This will help prevent creating multiple reports.



Report Completion

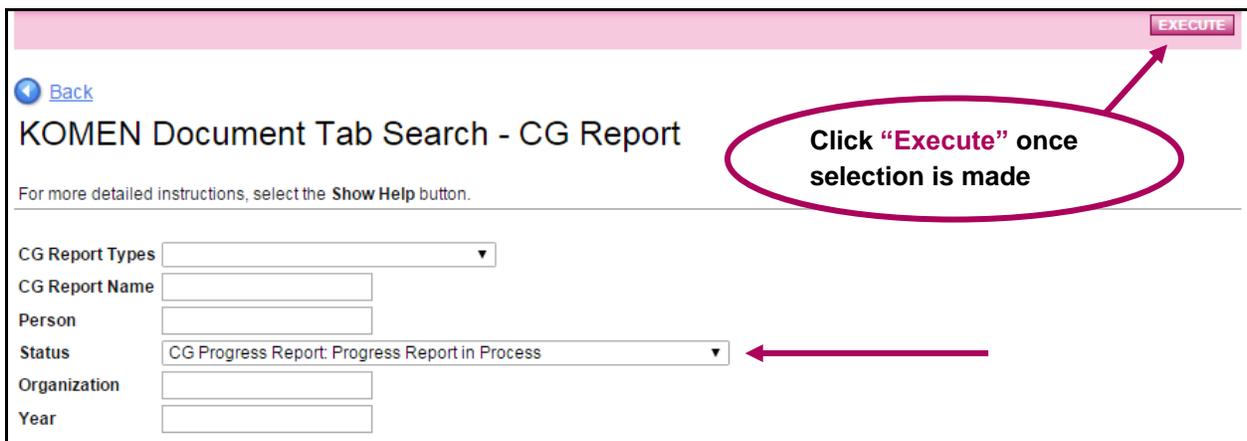
The Project Director, Authorized Signer and Writer can all work to complete the report in GeMS.

Once Reports are created, you may access them under the “My CG Reports” tab (NOT “My CG Applications”).

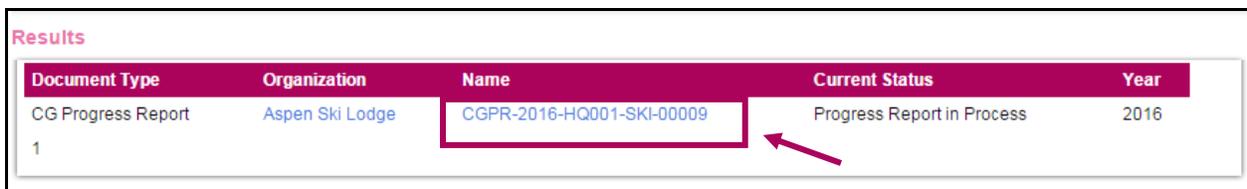
- 1) From the User Homepage, click the “My CG Reports” tab at the top of the page.



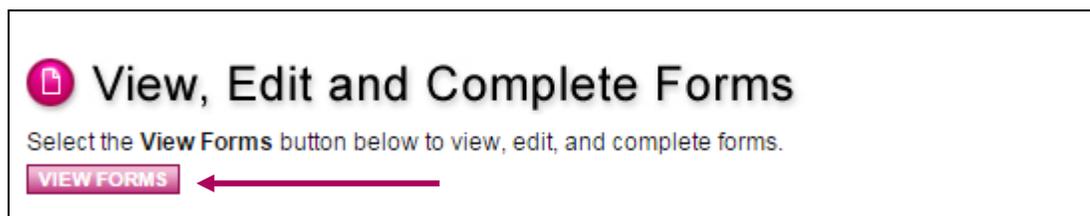
- 2) Search for all reports in the status “CG Progress Report: Progress Report in Process” or “CG Final Report: Final Report in Process.”



- 3) Select the report name for the project Progress or Final Report you would like to complete.



- 4) Select “View Forms” under “View, Edit and Complete Forms.”



5) Complete all report forms.

CG Progress Report Menu - Forms

Please complete all required forms below.

Document Information: [CGPR-2016-HQ001-SKI-00009](#)
[Details](#)

Forms

Status	Page Name	Note	Created By	Last Modified By
Progress Report Menu				
	Progress Report - Narrative			
	Progress Report - Work Plan (Objectives)			
	Progress Report - Work Plan (Objectives) Summary			
	Progress Report - Budget			
	Materials			
	Materials Summary			

Helpful Hints:

The Progress and Final Reports ask for the same information and nearly all reporting information is required. Information from an approved Progress Report will automatically be carried over into the Final Report by GeMS when the Final Report is initiated.

When completing the report, it is incredibly important to hit the **“SAVE”** button after each section. If you navigate away from a page without hitting the **“SAVE”** button, the system will not prompt you to save the information before leaving the page and all of the data you entered will be lost.

The **“SAVE” button should be your new best friend!**

Progress Report - Materials

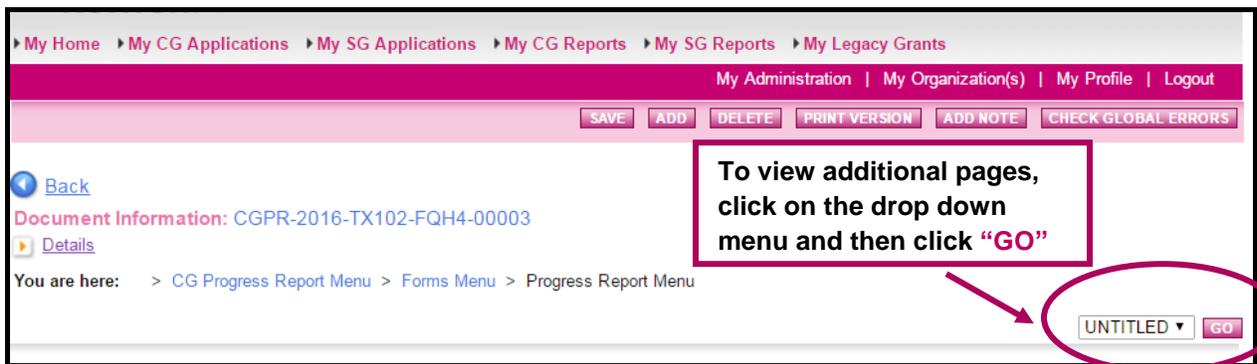
The progress report materials page will allow a user to upload one attachment per page.

Once you have clicked “Save” upon completing the “Progress Report – Materials” page for the first attachment. The menu along the top of the page will update and include an “Add” button.

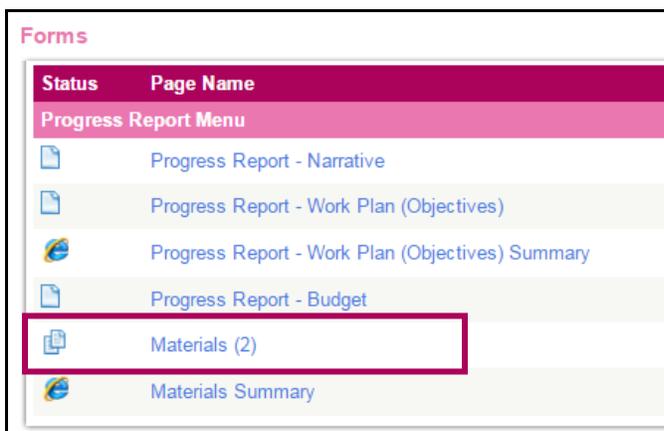
Simply click on the “Add” button and a new “Progress Report – Materials” page will populate for you to upload additional materials.



To review the different “Materials” you have uploaded, you can use the drop down menu:



As you complete additional pages, you the forms menu will indicate there are additional “Materials” pages



Report Submission

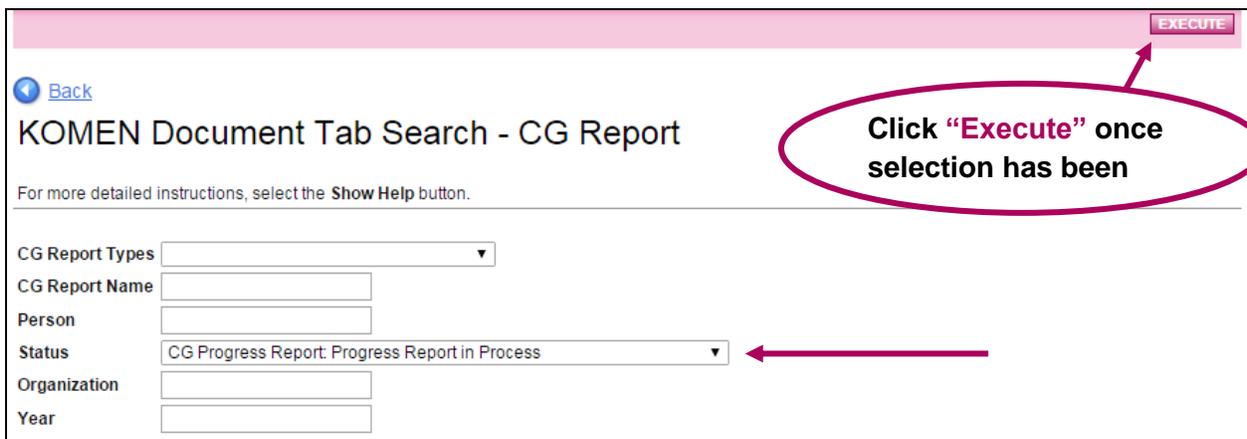
The **Project Director** must change the status of the report to “Authorized Signature Required” to begin the report submission process.

The **Authorized Signer** must finalize the submission by changing the status to “Report Submitted.”

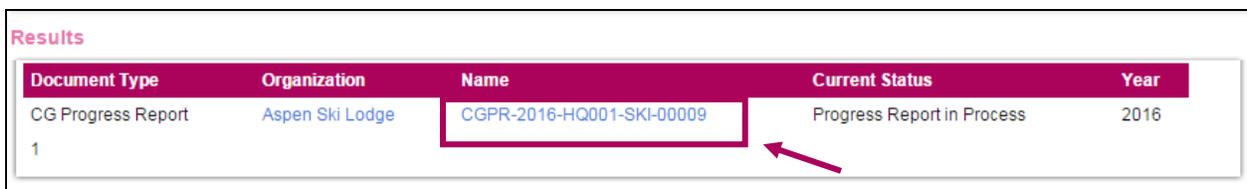
- 1) The Project Director will login to GeMS, and from the User Homepage, click the “My CG Reports” tab at the top of the page.



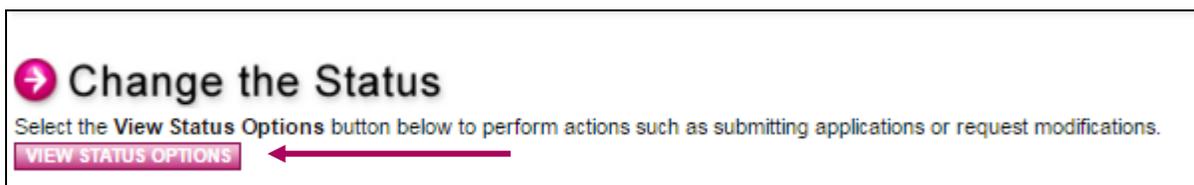
- 2) Search for all reports in the status “CG Progress Report: Progress Report in Process” or “CG Final Report: Final Report in Process.”



- 3) Select the report name for the project Progress or Final Report you would like to be submitted.



- 4) Click “View Status Options” under “Change the Status.”

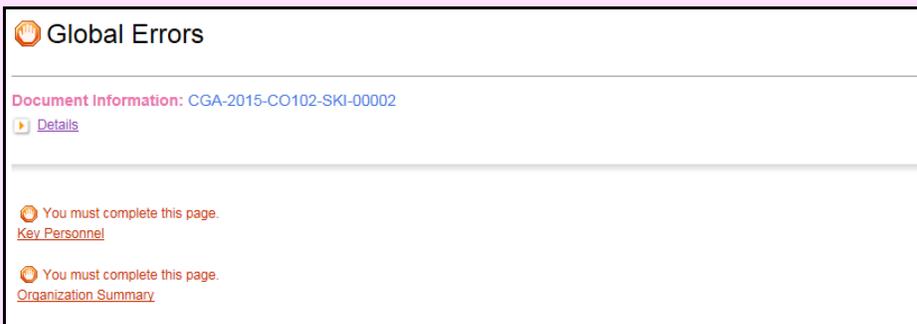


- 5) Click “Apply Status” under “Authorized Signature Required.”

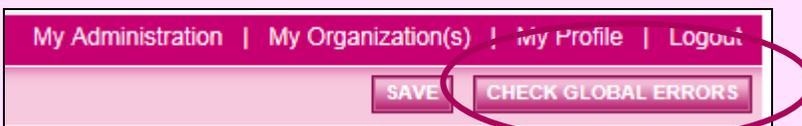


Helpful Hint:

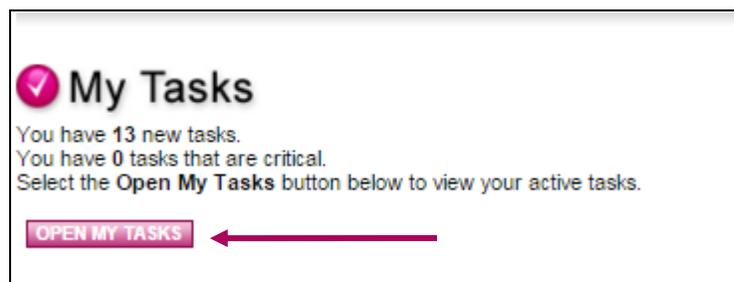
If any errors exist on any of the report’s forms when the Project Director attempts to change the status to “Authorized Signature Required” or the Authorized Signer attempts to submit, they will receive an error message directing them to the form(s) with errors. All errors must be fixed before GeMS will allow a report to be submitted. If no errors exist, the grantee will be prompted to confirm his or her submission.



You can check for errors at any time using the Global Errors link.



- 6) The **Authorized Signer** will now login to GeMS.
- 7) From the GeMS homepage, click on “Open My Tasks.”



8) Select the report they would like to submit from their task list.

My Tasks

Export Results to: Screen Sort by: -- Select -- GO

CG Final Report	Aspen Ski Lodge	CGFR-2016-HQ001-SKI-00005	Final Report In Process	8/19/2015
CG Final Report	Aspen Ski Lodge	CGFR-2016-HQ001-SKI-00006	Final Report In Process	8/20/2015
CG Final Report	Aspen Ski Lodge	CGFR-2016-HQ001-SKI-00007	Final Report In Process	8/20/2015
CG Final Report	Aspen Ski Lodge	CGFR-2016-HQ001-SKI-00008	Final Report In Process	8/23/2015
CG Progress Report	Aspen Ski Lodge	CGPR-2016-HQ001-SKI-00004	Authorized Signature Required	9/17/2015
CG Progress Report	Aspen Ski Lodge	CGPR-2016-HQ001-SKI-00009	Authorized Signature Required	11/6/2015

9) Review the report.

10) Click “View Status Options” to see the possible statuses.

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS ←

11) Click “Apply Status” under “Progress Report Submitted.”

Possible Statuses

PROGRESS REPORT SUBMITTED

APPLY STATUS ←

12) The Affiliate will review the submitted report and notify the Project Director:

- If there are any revisions/modifications needed
- If the report is approved

Report Submission Checklist

In order to complete the report process, please verify the 5 steps below have been completed.

- 1) **Project Director** initiates the Progress and/or Final Report.
- 2) Project Director/Writer/Authorized Signer completes each page of the report.
- 3) **Project Director** changes the status to “**Authorized Signature Required.**”
- 4) **Authorized Signer** changes the status to “**Report Submitted.**”
- 5) Both the Project Director and Authorized Signer will receive an automatic email notification when the application is officially submitted.

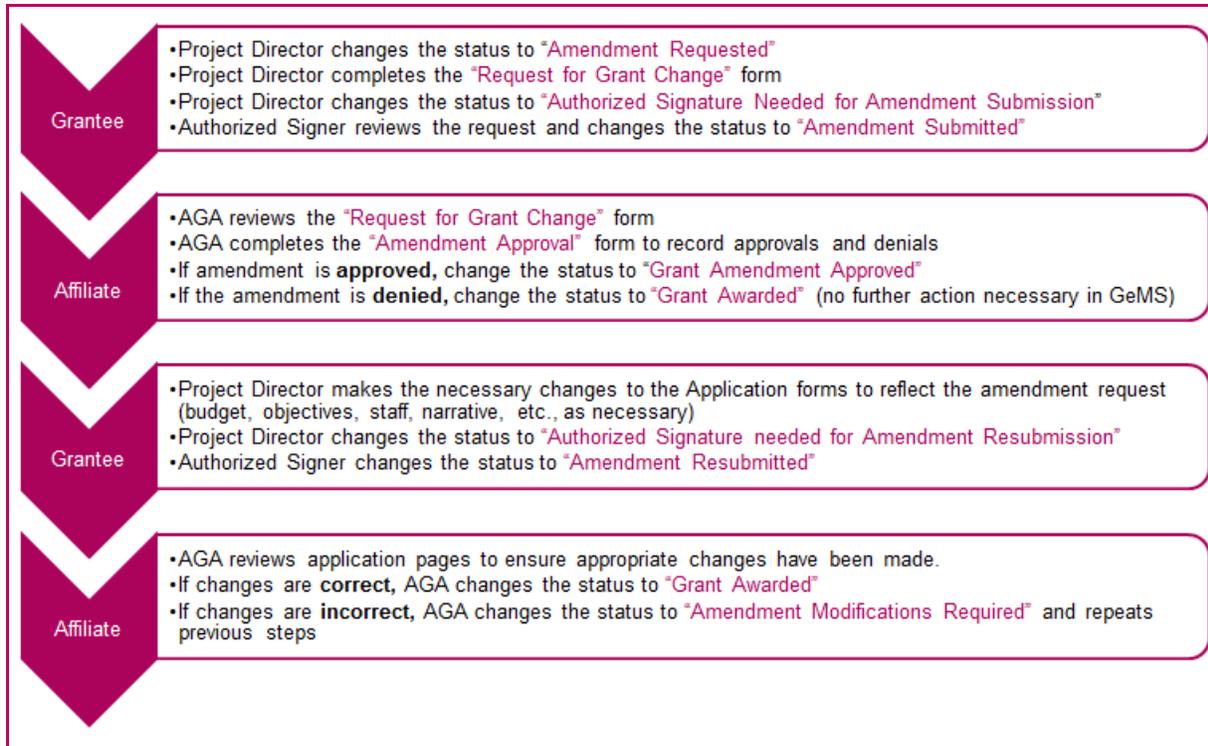
Helpful Hints:

A grantee can start a report early, but if they have a grant amendment that is approved after initiating a report, they need to start a new report. The existing report will not pull in the new updated information from the application (budget, objectives, etc..) – essentially the numbers on the report and application will not match.

If a report has been started by a Project Director, and someone at their organization cannot see the report when they search for it, most likely that user is not tied to the report. The Project Director can add this person to the report by using the “**Add/Edit**” people function under “**Access Management Tools**” on the **CG Report Menu** page.

Amendments and Grant Change Requests

An overview of how to complete a Grant Amendment /Change Request



Amendments and Grant Change Requests can only be initiated by the **Project Director** and submitted by the **Authorized Signer**. Amendments may be submitted for the following:

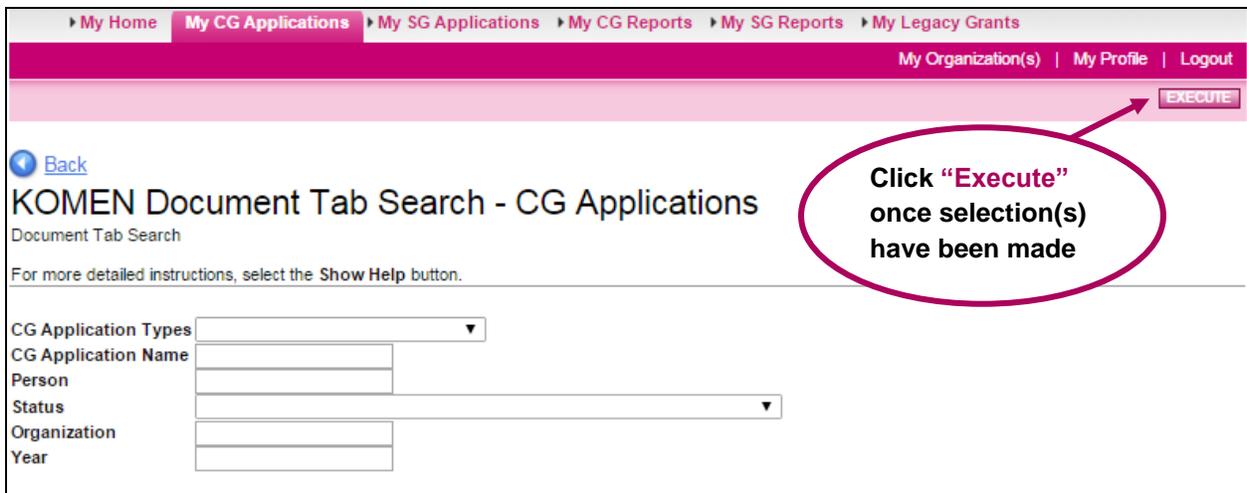
- A no-cost extension request
- Budget changes
- Personnel changes
- Other requests as deemed appropriate by the Affiliate

Amendment Submission

- 1) The **Project Director** logs in to GeMS.
- 2) Click on the “My CG Applications” tab on the User Homepage.



- 3) Execute an application search for the application you would like to change. **Application must be in “Grant Awarded” status to begin this process.**



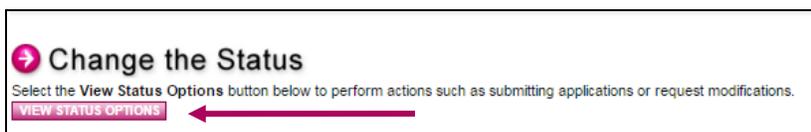
- 4) Select the name of the application for which you want to complete an amendment.

Number of Results 14

Results

Document Type	Organization	Name	Current Status	Year
CG Application	Aspen Ski Lodge	CGA-2012-CO100-SKI-00001	Amendment Submitted	2012
CG Application	Aspen Ski Lodge	CGA-2012-CO100-SKI-00002	Grant Closed-Good Standing	2012
CG Application	Aspen Ski Lodge	CGA-2015-CO102-SKI-00001	Grant Awarded	2015
CG Application	Aspen Ski Lodge	CGA-2016-HQ001-SKI-00001	Amendment Requested	2016
CG Application	Aspen Ski Lodge	CGA-2016-HQ001-SKI-00002	Application Submitted	2016
CG Application	Aspen Ski Lodge	CGA-2015-CO102-SKI-00002	Authorized Signature Required	2015

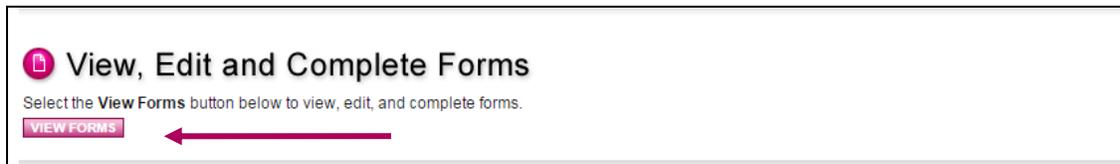
- 5) Select “View Status Options” under “Change the Status.”



- 6) Select the “Apply Status” button under “Amendment Requested” as the new status.



- 7) Next, access the “Request for Grant Change” form by navigating back to the “CG Application Menu” and clicking the “View Forms” button under “View, Edit and Complete Forms.”



- 8) Scroll down and click on Click on the “Request for Grant Change” page within the “Amendment” section to review the requested change.



- 9) Complete the “Request for Grant Change” form in its entirety and select the “SAVE” button in the upper right hand corner of the page.

SAVE CHECK GLOBAL ERRORS

Back

Document Information: CGA-2016-HQ001-SKI-00003

Details

You are here: > CG Application Menu > Forms Menu

REQUEST FOR GRANT CHANGE

Request for Grant Change: As required by the grant agreement, any changes to the funded project must be submitted for prior approval. This section will collect the required information needed to consider proposed grant changes to the project design, scope of work, key personnel, etc.

Once you have completed the form below, please make sure you click the save button or no information will be saved.

Request Title: *

Grant Contract Date: to

Grant Project Title:

Grantee:

Project Director: ▼

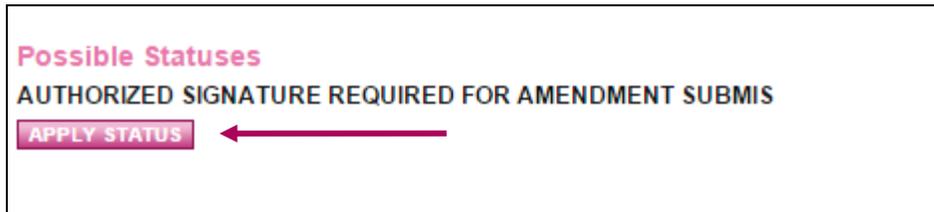
Phone:

Fax: (555) 333-6666

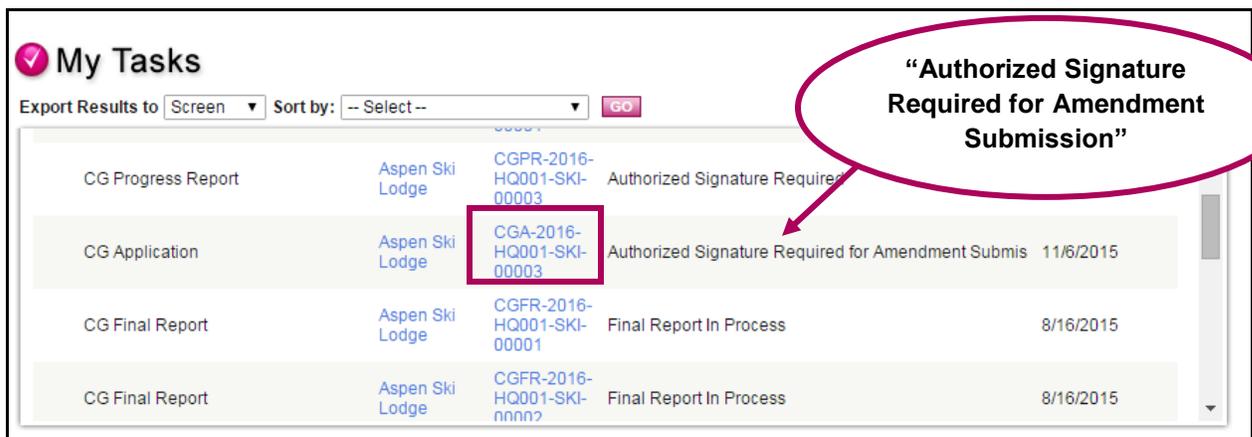
Email Address:

Click “Save” once form has been completed in its entirety

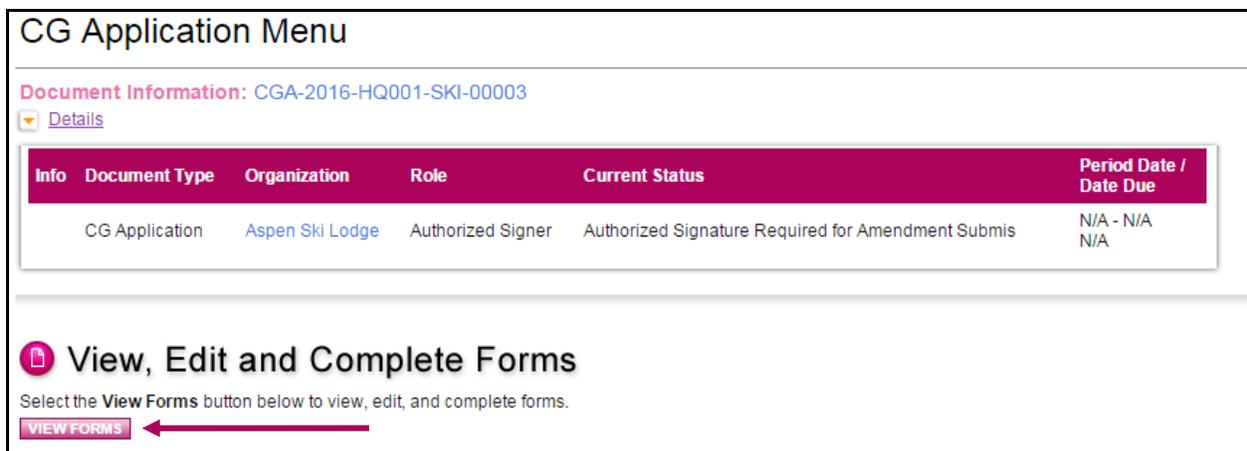
- 10) Navigate back to the “CG Application Menu” and select “Change the Status.” Change the status to “Authorized Signature Required for Amendment Submission.”



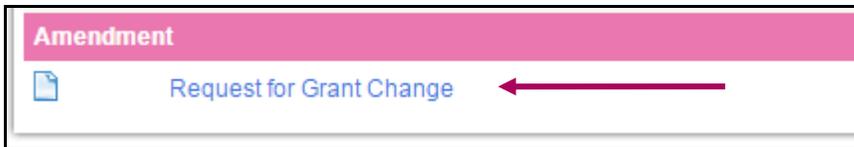
- 11) The **Authorized Signer** will then login to GeMS and click on **My Tasks** from the GeMS homepage to access the application.



- 12) Next, access the “Request for Grant Change” form by clicking the “View Forms” button under “View, Edit and Complete Forms.”



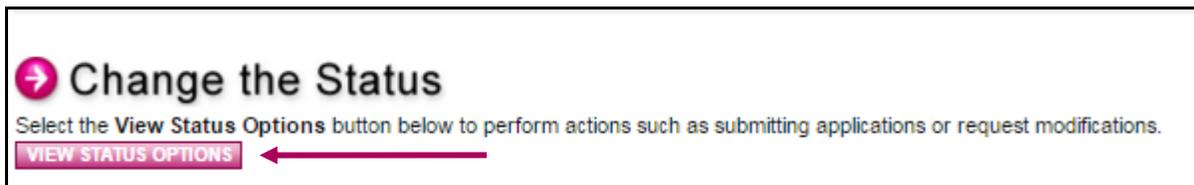
- 13) Scroll down and click on click on the “Request for Grant Change” page within the “Amendment” section to review the requested change.



- 14) After reviewing the Request for Grant Change form, click on the application number (Document Information [CGA-2016-XXXX-XXX-XXXX](#)) to return to the “CG Application Menu.”

A screenshot of a web form titled "REQUEST FOR GRANT CHANGE". At the top right, there are two buttons: "SAVE" and "CHECK GLOBAL ERRORS". Below these, there is a "Back" link with a blue arrow icon. The main content area shows "Document Information: CGA-2016-HQ001-SKI-00003" with a red arrow pointing to it. Below this is a "Details" link with a yellow arrow icon. A breadcrumb trail reads "You are here: > CG Application Menu > Forms Menu". The form title "REQUEST FOR GRANT CHANGE" is followed by a paragraph of instructions. Below the instructions are several input fields: "Request Title:" with a text box and an asterisk; "Grant Contract Date:" with a date picker; "Grant Project Title:"; "Grantee:"; "Project Director:" with a dropdown menu; "Phone:"; "Fax:" with the value "(555) 333-6666"; and "Email Address:".

- 15) Select “View Status Options” under “Change the Status.”



- 16) Select the “Apply Status” button under “Amendment Submitted” as the new status.



The Affiliate will review the proposed application amendment and notify the Project Director whether the amendment was approved or denied.

The “Request for Grant Change” form can be “Saved” **ONLY** once the status has been changed to “Amendment Requested.” Do not start typing if you do not see the “Save” button.

The Amendment must be in “Amendment Submitted” status prior to the Affiliate reviewing the request (**NOT** “Amendment Requested” – this is the status when the grantee is working on the request).

Additional Amendment Requests

If the grantee needs to make additional amendment requests throughout the course of the grant cycle, they will follow the same steps above. When the “Request for Grant Change” form opens, the **Project Director** will have the option to “Add” a new request. This will create an additional “Grant Change Request” form; all request forms will be accessible through a drop down box at the top of the grant change form.



Note about Amendments/Changes and Reports:

If a grantee requests a change prior to a reporting deadline and has already initiated a report – please be sure to start a new report that will pull in the updated application information.

Remember the information from reports pulls directly from the application as it existed at the time the report was created.

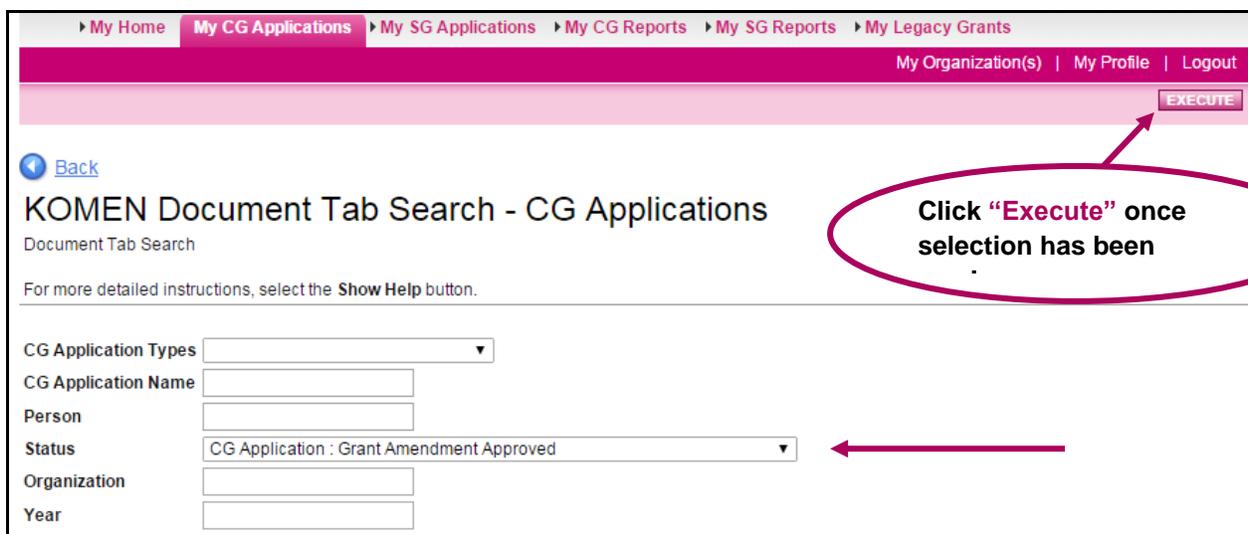
Amendment Resubmission

Once a Grant Amendment has been approved by the Affiliate, the Project Director must log back into GeMS and make the approved changes within the original application and resubmit the amendment.

- 1) The **Project Director** must select the **My CG Applications** tab to begin the amendment resubmission process.



- 2) Search by status “Grant Amendment Approved” and click “Execute.”

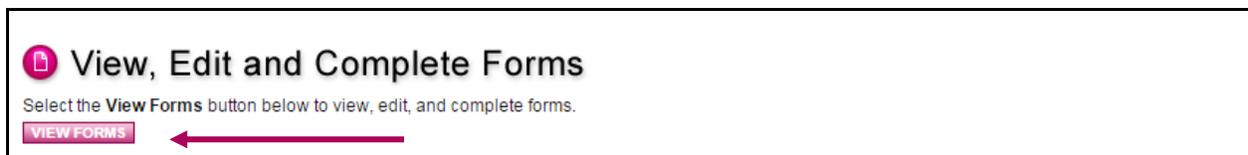


- 3) Select the name of the application to complete the amendment process.

Results

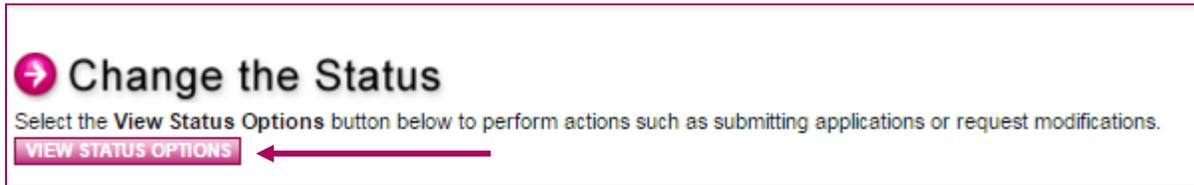
Document Type	Organization	Name	Current Status	Year
CG Application	Aspen Ski Lodge	CGA-2016-HQ001-SKI-00003	Grant Amendment Approved	2016
1				

- 4) Select “View Forms” under “View, Edit and Complete Forms.”

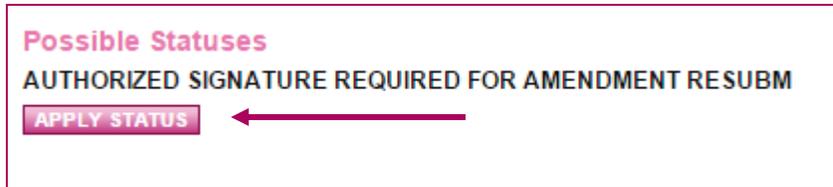


- 5) Make the necessary changes in the application to reflect the approved changes in the amendment and “Save” each page.

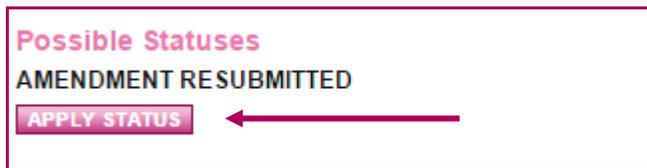
- 6) Once all changes are made, the **Project Director** will navigate to the “CG Application Menu” and click on “View Status Options” under “Change the Status.”



- 7) Select “Apply Status” under “Authorized Signature Required for Amendment Resubmission.”



- 8) The **Authorized Signer** will then login to GeMS to review the changes made to the application pages and navigate to the “CG Application Menu” and click on “View Status Options” under “Change the Status.”
- 9) Select “Apply Status” under “Amendment Resubmitted.”



The Affiliate will then review the changes made to the application pages and approve or deny the submission.

- If the changes are correct, the Affiliate will change the status to “Grant Awarded.”
- If the changes are incorrect, the Affiliate will change the status to “Amendment Modifications Required.”

Helpful Hint:

The Application pages needing changes after an amendment is approved will vary based on the nature of the request. Pages that commonly need updates include: Budget, Objectives, Narrative, Key Personnel.

Amendment Submission Checklist

In order to complete the amendment process, please verify the 9 steps below have been completed.

- 1) **Project Director** changes the application status to “**Amendment Requested.**”
- 2) **Project Director/Writer/Authorized Signer** completes the “**Request for Grant Change Form.**”
- 3) **Project Director** changes the status to “**Authorized Signature Required for Amendment Submission.**”
- 4) **Authorized Signer** changes the status to “**Amendment Submitted.**”
- 5) The Affiliate approves or declines proposed changes.
- 6) **If amendment is approved, Project Director** will make necessary changes to original application.
- 7) **Project Director** changes the status to “**Authorized Signature Required for Amendment Resubmission.**”
- 8) **Authorized Signer** changes the status to “**Amendment Resubmitted.**”
- 9) The Affiliate will change the status to “Grant Awarded” if the changes are correct or to “Amendment Modifications Required” if the changes are incorrect.

Printing an Application

1) To print a hard copy of the application, you need to access the **Application Menu** for the application you would like to print.

Reminder: You can do this through the “**My Tasks**” tab on the User Homepage.

My Tasks

Export Results to: Screen Sort by: -- Select -- GO

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	CG Application	Central and South Jersey	CGA(B)-2016-HQ002-SGKCSJ-00058	Application Review Required	8/21/2015	

Click on the Application Name to access the **Application Menu**

2) Click “**View Management Tools**” under “**Access Management Tools.**”

CG Application Menu

Document Information: CGA-2016-TX104-AJKB39-00008

Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	CG Application	All Saints Health Foundation, Joan Katz Breast Center at Baylor All Saints Medical Center	Komen HQ Administrator	Grant Approved Funding Not Available	04/01/2016 - 03/31/2017 11/27/2015 5:10PM EST

View, Edit and Complete Forms
Select the **View Forms** button below to view, edit, and complete forms.
VIEW FORMS

Change the Status
Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.
VIEW STATUS OPTIONS

Access Management Tools
Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.
VIEW MANAGEMENT TOOLS

Initiate / Access Reports
Select the **Initiate/Access Reports** button below to initiate a new report or access an existing report.
INITIATE/ACCESS REPORTS

3) Click on “**Create Full Print Version.**” The PDF version of the entire application will open in a new screen.

Management Tools

CREATE FULL PRINT VERSION

Select the link above to create a printable version of the document.

Printing a Report

- 1) To print a hard copy of a report, you need to access the Progress Report Menu for the report you would like to print.

Reminder: You can do this through the “My Tasks” tab on the User Homepage for reports that are in process. Otherwise, use the “My CG Reports” tab at the top of the page.

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	CG Progress Report	Aspen Ski Lodge	CGPR-2016-HQ001-SKI-00009	Progress Report in Process	11/17/2015	

- 2) Click “View Management Tools” under “Access Management Tools.”

CG Application Menu

Document Information: [CGA-2017-HQ001-SKI-00010](#)
[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	CG Application	Aspen Ski Lodge	Project Director	Application In Progress	05/04/2016 - 03/31/2018 N/A

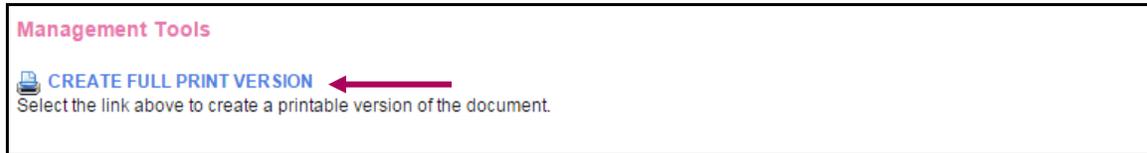
View, Edit and Complete Forms
 Select the **View Forms** button below to view, edit, and complete forms.
[VIEW FORMS](#)

Change the Status
 Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.
[VIEW STATUS OPTIONS](#)

Access Management Tools
 Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.
[VIEW MANAGEMENT TOOLS](#)

Initiate / Access Reports
 Select the **Initiate/Access Reports** button below to initiate a new report or access an existing report.
[INITIATE/ACCESS REPORTS](#)

3) Click on “**Create Full Print Version.**” The PDF version of the entire application will open in a new screen.



GeMS Quick Reference Guide

System Registration

Please follow these directions in their entirety to complete the system registration process. If you have any questions or run into any roadblocks during the registration process, please call or email the Affiliate for further assistance. The registration process should take 3-5 minutes.

How to Register

1. Go to affiliategrants.komen.org (do not type www.)
2. From the Susan G. Komen GeMS system homepage click the “Register now” link located towards the bottom of the homepage.
3. Complete the user form in its entirety. Once you have created a user account and gained access to the system, you will never have to request access again.
4. All items marked with an ‘*’ are required to create your account.

The Registration Form

1. Enter your contact information in the appropriate fields – name, title, email, and phone.
2. You should always select “Grantee” or “Applicant” from the drop down menu for the “What is your position at the Affiliate?” field.
Hit the pink “GO” button next to the field and wait 5-10 seconds. You MUST hit the pink “GO” button in order to move on to the next field.
3. For Affiliate State, please choose the state in which the Affiliate’s office is located from the drop down menu. Press the pink “GO” button next to that field and wait 5-10 seconds.
4. For Affiliate, please choose the Affiliate name from the drop down menu. Press the pink “GO” button next to that field and wait 5-10 seconds.
5. For Organization, please choose the appropriate organization from the drop down menu. Press the pink “GO” button next to that field and wait 5-10 seconds.
6. Create a Username and Password.
 - a. The “Username” field must consist of all letters and numbers, minimum length 5 characters, maximum length 20 characters
 - b. The “Password” field must consist of all letters and numbers, minimum length 7 characters, maximum length 20 characters (case sensitive)
 - c. The fields “Password” and “Confirm Password” must be the same
7. **Click “SAVE” in the upper right hand corner to save and submit your registration!** If you do not hit “SAVE” your information will be lost and your registration will not be submitted.
8. Users are then approved by the individual assigned to the role of Project Director in GeMS.

User Approval for Project Directors

Please follow these directions in their entirety to complete the system registration process. If you have any questions or run into any roadblocks during the registration process, please call or email the Affiliate for further assistance. The registration process should take 3-5 minutes.

1. The Project Director will receive an automatic email from GeMS when a user within their organization has registered and needs to be approved.
2. Go to affiliategrants.komen.org and log-in.
3. Select the “My Administration” tab at the top of the homepage.
4. Select the “User Approval for Project Directors” link within the My Administration page.
5. You will be directed to the User Approval page. Select “New User” from the dropdown menu in the User Type field.
6. Select the pink **SEARCH** button to search for all new users.
7. Scroll down the page to view the “Search Results” section.
8. Select the checkbox next to the user’s name in the Search Results section.
9. Select “Approve User” in the Approval Type field.
10. Select your organization’s name from the dropdown menu in the “Assign person’s organization to” field.
11. Select the appropriate role you would like to assign the new user to from the dropdown menu in the “Set person’s role to” field.
12. The current date will appear in the “Active Date” field. You do not have to enter anything into the “Inactive Date” field unless you know the date you would like the user’s access to be inactivated.
13. Do not enter anything in the “Organization Identifier” field. The system will automatically fill this in with your organization’s information based on what you input in the “Assign person’s organization to” field.
14. Select the “Approve Selected User” button to complete the user’s validation/approval.
15. The user will receive an automatic email from the system notifying them that they have been approved and can now access GeMS.
16. If, once approved, the new user cannot access any of the applications and/or reports in the system, contact the Affiliate immediately.

Amendments and Grant Change Requests

Amendments and Grant Change Requests can only be initiated by **Project Directors** and submitted by **Authorized Signers**. Amendments may be submitted for the following:

- A no-cost extension request
- Budget changes
- Personnel changes
- Other requests as deemed appropriate by the Affiliate

Amendment Submission

1. The **Project Director** logs in to GeMS.
2. Click on the **My CG Applications** tab on the User Homepage.
3. Execute a search for the application you would like to change.

4. Select the name of the application you want to complete an amendment for and you will be directed to the “CG Application Menu.”
5. Select “View Status Options” button in the Change the Status section.
6. Select the “Apply Status” button under the option “Amendment Requested.”
7. Next, navigate back to the “CG Application Menu” and click the “View Forms” button under “View, Edit and Complete Forms” section.
8. Scroll down to the bottom of the Forms Menu to find the “Request for Grant Change” form.
9. Click on the “Request for Grant Change” page within the Amendment section to input the requested change.
10. Complete the “Request for Grant Change” form and select the “Save” button in the upper right hand corner of the page.
11. Navigate back to the “CG Application Menu” and select “Change the Status” again. Change the status to “Authorized Signature Required for Amendment Submission.”
12. The **Authorized Signer** logs on to GeMS, clicks on the “My Tasks” button on the User Homepage, and changes the status to “Amendment Submitted.”
13. The Affiliate will review the proposed application amendment and notify the Project Director:
 - When the amendment is received.
 - Whether the amendment was approved or denied.

Amendment Resubmission

When the Grant Amendment has been approved by the Affiliate, the Project Director must log back into GeMS and make the approved changes on the application itself and resubmit the amendment.

1. The **Project Director** will log onto GeMS and select the My CG Applications tab.
2. Execute a search for the application for which you want to complete an amendment resubmission.
3. Select the name of the application you would like to complete an amendment resubmission for to be directed to the “CG Application Menu.”
4. To make changes to the original application, select “View Forms” in the “View, Edit and Complete Forms” section on the “CG Application Menu.”
5. Make the appropriate changes to the applicable sections of the original application (the Affiliate will provide you with detailed instructions for this when the amendment is approved) and hit the “Save” button.
6. Project Director changes the status to “Authorized Signature Required For Amendment Resubmission.”
7. The **Authorized Signer** logs in and navigates back to the “CG Application Menu” and select “Change the Status.” Change the status of the application to “Amendment Resubmitted.”
8. The Affiliate will pull a report on what changes have been made and confirm the changes are the approved changes.
 - If the changes are correct, the Affiliate will change the status to “Grant Awarded.”
 - If the changes are incorrect, the Affiliate will change the status to “Amendment Modifications Required.”

Amendment Submission Checklist

In order to complete the amendment process, please verify the 9 steps below have been completed.

1. **Project Director** changes the application status to “Amendment Requested”.
2. Project Director/Writer/Authorized Signer completes the “Request for Grant Change” Form.
3. Project Director changes the status to “Authorized Signature Required for Amendment Submission.”
4. **Authorized Signer** changes the status to “Amendment Submitted.”
5. The Affiliate approves or declines proposed changes.
6. If amendment is approved, Project Director will make necessary changes to original application.
7. **Project Director** changes the status to “Authorized Signature Required for Amendment Resubmission.”
8. **Authorized Signer** changes the status to “Amendment Resubmitted.”
9. The Affiliate will change the status to “Grant Awarded” if the changes are correct or to “Amendment Modifications Required” if the changes are incorrect.

Progress & Final Reports

How to Create a Progress and/or Final Report

The Project Director is the only user who is permitted to initiate progress and final reports for an organization’s approved application. In order to create the progress and final reports, the **Project Director** must follow these steps:

1. Go to affiliategrants.komen.org and log into GeMS.
2. From the User Homepage, click the “My CG Applications” tab at the top of the page.
3. Search for the application you want to start a report for and select the application name from the search results. This will take you to the “CG Application Menu.”
4. From the “CG Application Menu,” select the “Initiate/Access Reports” button under “Initiate/Access Reports.”
5. Select the name of the report you would like to create.
6. Select “I agree” to continue the creation of the report.
7. The CG Progress Report Menu will automatically open. **It is important to note that the CG Progress Report Menu looks nearly identical to the “CG Application Menu.” The only way to determine if you are in the correct menu is to look at the page headings at the top of the page.**
8. Click the “View Forms” button under “View, Edit and Complete Forms” to access the required reporting forms.

****Once a report is initiated, it can no longer be accessed by following the steps above; please follow the steps outlined below once the Project Director has created a report.***

How to Complete a Progress and/or Final Report

The Project Director, Authorized Signer and Writer roles are permitted to edit and complete reports. In order to complete the progress and final reports once they are created, these steps should be followed:

1. From the User Homepage, click the “My CG Reports” tab at the top of the page.
2. Execute a search for the Progress or Final Report you would like to complete and click on the report name from the search results. You will then be directed to the “CG Report Menu.”
3. Select the “View Forms” button under “View, Edit and Complete Forms.”
4. Complete all of the report forms in their entirety.
5. Once the forms are complete, the **Project Director** will go to the CG Report Menu and select the “View Status Options” button under “Change the Status.” The Project Director will change the status to “Authorized Signature Required.”
6. The **Authorized Signer** will then log into GeMS and change the status to “Report Submitted.”