



Grants eManagement System (GeMS)

Affiliate User Guide
Version 2.5

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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, as the GeMS server is located in Dallas, TX.

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.

Helpful Hint: Character count on the side of the textbox?

If the character counts are not under the textbox, please enable the compatibility mode and the alignment will be resolved.

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.

Accessing GeMS

Welcome to GeMS! **In order to use the system you must first be granted access to it.** There is one 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 AGA should be the first Affiliate user to register. At an applicant/grantee organization, the Project Director should register first.**

Affiliate User Roles

AGA – Affiliate Grants Administrator

The role of the Affiliate Grants Administrator (AGA) should be assigned to the individual at the Affiliate that is responsible for executing the tasks related to the day to day management of the grant process. This is the highest level Affiliate user and this individual will have all of the administrative functions available for use. The AGA is the only user that can approve system users and manage the review process. Komen HQ will assign each Affiliate's AGA; this is the only role that Komen HQ must assign. **There can only be one AGA per Affiliate.**

AGM – Affiliate Grants Manager

The role of the Affiliate Grants Manager (AGM) should be assigned to any individual at the Affiliate that is responsible for assisting in the oversight of the grant process. This individual will have administrative functions available for use. The AGM is responsible for setting up grant payments in GeMS; many Affiliates opt to have their finance staff or Treasurer fill this role.

AGV – Affiliate Grant Viewer

The role of Affiliate Grants Viewer (AGV) should be assigned to any individual that would need to view various pieces of the process but does not need any functionality to save, add, edit, or change any piece of the system. Examples of people that may be assigned this role include non-mission Affiliate staff, Grants Committee members, and others that may want to view grant applications and reports but are not involved in the active administration of the program.

Reviewer

The role of reviewer should be assigned to any individual that will be reviewing community and small grant applications for the Affiliate as a member of the peer review panel. This user will have access to the forms required to review and score the applications they are assigned.

COI Approver (Conflict of Interest)

The role of COI Approver should be assigned to the individual at the Affiliate that the Board of Directors has designated as the person authorized to review and determine if a conflict of interest exists between an individual and an applicant and/or grantee organization. Reported conflicts will be documented in the system and the COI Approver is responsible for deciding if individuals need their current grantmaking responsibilities adjusted based on the reported conflicts. **There can only be one COI Approver per Affiliate.**

Applicant/Grantee Roles

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 process to help complete the application but does not have the authority to complete the submission process. This individual cannot change the status of an application and will not have administrative function availability. There can be multiple writers per organization.

Helpful Hint:

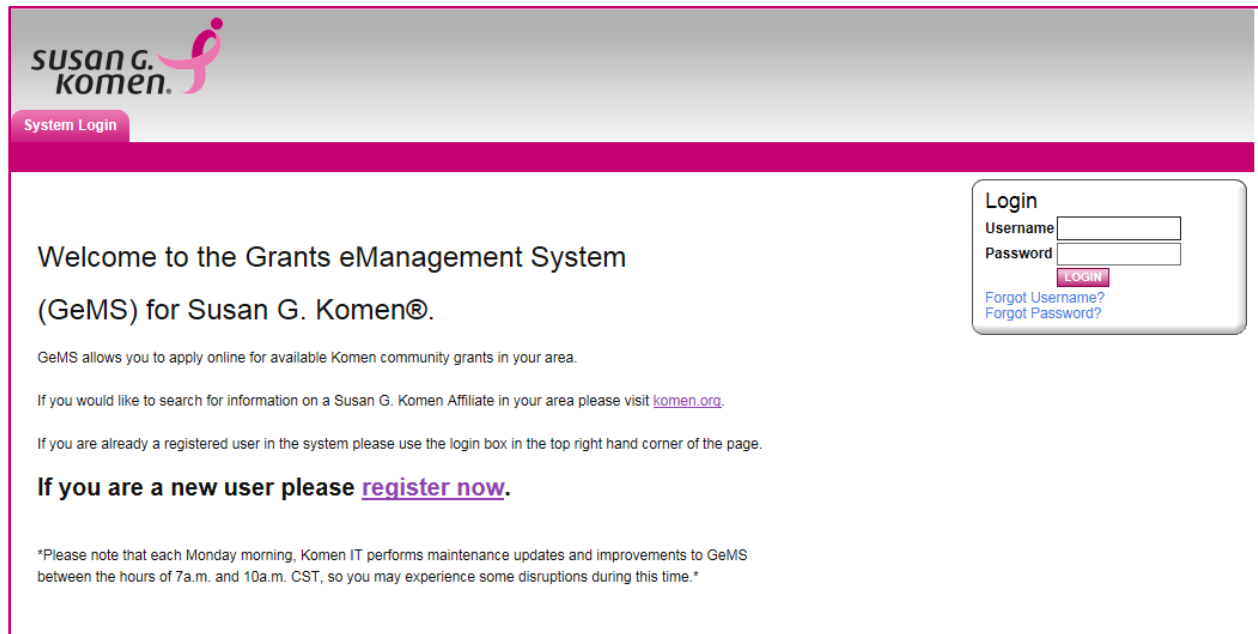
- The Project Director must be the first individual at an organization to register.
- The Project Director will then approve all subsequent users from their organization.
- The Authorized Signer should register and be validated/approved by the Project Director prior to the creation of the organization's 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.

GeMS Login and Registration

To access Grants eManagement System (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.



susan g. komen.

System Login

Welcome to the Grants eManagement System
(GeMS) for Susan G. Komen®.

GeMS allows you to apply online for available Komen community grants in your area.

If you would like to search for information on a Susan G. Komen Affiliate in your area please visit [komen.org](https://www.komen.org).

If you are already a registered user in the system please use the login box in the top right hand corner of the page.

If you are a new user please [register now](#).

Please note that each Monday morning, Komen IT performs maintenance updates and improvements to GeMS between the hours of 7a.m. and 10a.m. CST, so you may experience some disruptions during this time.

Login

Username

Password

[Forgot Username?](#)

[Forgot Password?](#)

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

Creating a New Account

Helpful Hint: Need to add a new AGA?

AGAs are the only users that must be approved by Komen HQ. Once the user has completed the registration process in GeMS, your Affiliate's Executive Director should simply fill out a support request on myKomen and request that the new AGA be added to the system and all existing documents.

- 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?”

- Applicant
- Grantee
- Reviewer
- Komen Staff
- Komen Volunteer
- Komen Board Member
- Komen Grants Committee Member
- COI Approver

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

Name: Prefix First Middle Last Suffix

Title

Email

Phone

What is your position at your Affiliate? Komen Staff

Affiliate State Alabama

Affiliate

Organization

Username

Password Confirm Password

Make Selection and click GO

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

[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

Name:

Title

Email

Phone

What is your position at your Affiliate?

Affiliate State

Affiliate

Organization

Username

Password Confirm Password

Select STATE and click GO

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

The screenshot shows the 'Registration' page with a 'Contact Information' section. The 'Affiliate' dropdown menu is open, displaying a list of options including 'Komen Headquarters', 'Special Grants', 'Greater Amarillo Affiliate', 'Lubbock Area Affiliate', 'North Texas Affiliate', 'Austin Affiliate', 'Central Texas Affiliate', 'Dallas County', 'El Paso Affiliate', 'Greater Fort Worth Affiliate', 'Houston Affiliate', 'San Antonio Affiliate', 'Texarkana Affiliate', 'Tyler Affiliate', 'Wichita Falls Affiliate', and 'Global Grants'. The 'Komen Headquarters' option is highlighted. A callout bubble with a pink border and the text 'Select Affiliate and click GO' points to the dropdown menu. The form also includes fields for Name (First, Middle, Last, Suffix), Title, Email, Phone, What is your position at your Affiliate?, Affiliates State, Organization, Username, Password, and Confirm Password. There are 'GO' buttons next to the Affiliates State and Organization dropdowns. At the bottom, there are links for 'Top of the Page', 'Privacy Policy and Legal', and a copyright notice for Agate Software, Inc.

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

Affiliate users will select the name of their Affiliate.

First time applicant organization names will not appear in the dropdown list. You will choose “Other” from the “Organization” drop down list and complete the “Organization Registration” section during your registration.

The screenshot shows the 'Registration' page with a 'Contact Information' section. The 'Organization' dropdown menu is open, displaying a list of options including 'Other', 'Community of Hope Inc.', 'Komen Headquarters', and 'Texas Tech University Health Sciences Center'. The 'Other' option is highlighted. A callout bubble with a pink border and the text 'Select Organization Name and Click GO' points to the dropdown menu. The form also includes fields for Name (Prefix, First, Middle, Last, Suffix), Title, Email, Phone, What is your position at your Affiliate?, Affiliates State, Affiliates, Organization, Username, Password, and Confirm Password. There are 'GO' buttons next to the Affiliates State and Organization dropdowns. At the bottom, there are links for 'Top of the Page', 'Privacy Policy and Legal', and a copyright notice for Agate Software, Inc.

- 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.
- 3) New Affiliate users (staff and volunteers) will need to complete a “**Conflict of Interest (COI) form.**” This form is in addition to the annual COI that Affiliate staff, BOD, and Committee members complete each year on myKomen. This COI is specific to the grants process and will automatically populate anytime a user selects a Komen Affiliate role.
- a) Before completing this section, please click on the “**Conflict of Interest Acknowledgment Form**” and read the form. This form will be hyperlinked on the page when you are logged in.
 - b) After reviewing the form, please select any organization you have a conflict with from the list and include the reason for the conflict in the notes section. All current and prior grant applicants/grantees are listed. For any organization you have a conflict with that is not included in the list, select other and type the name of the organization as well as the reason for the conflict into the notes section.
 - c) All items marked with an ‘*’ are required for registration.
 - d) You can include as many conflicts as needed. If you are unsure if something is a conflict, consult with Affiliate leadership.

Conflict of Interest

Review the [Conflict of Interest Acknowledgement Form](#) before completing the fields below. If you are not certain about whether you have a conflict, please contact the Grants Administrator at the Affiliate to discuss. Note, you can't submit your registration until this page is complete. In the notes field, please state the conflict with the selected organization e.g. I am on the Board at this organization.

Date *

Affiliate North Central Alabama Affiliate

Conflict Of Interest ☐ Yes ☐ No

Organization	Notes
None	
None	
None	

All Affiliate users will complete this

If applicable, fill out this section for each organization that a conflict exists

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

Below. Once you have completed the fields please select the save button to complete your registration. If there is a pink Go button click the Go button before moving to the next question. Once you have registered you will receive a message at the top of the page at your registration is complete and you will receive an email informing you that your registration is complete. You will not be able to go back. Once you are approved you will receive an email informing you that you have access to the system.

Click **SAVE**

Prefix First Middle Last Suffix

Applicant

Texas

Komen Headquarters

Other

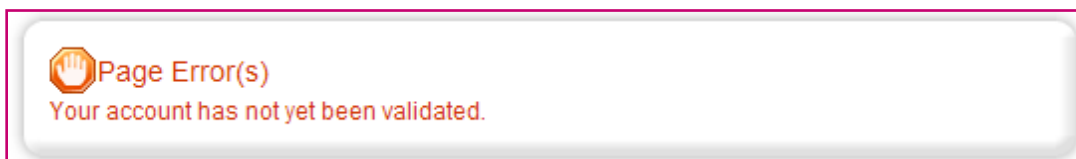
GO

GO

GO

GO

- 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:



Affiliate Grants Administrators will be approved by Susan G. Komen HQ, all other Affiliate users will be approved by the AGA.

You will receive notification that your registration has been submitted for approval and when access has been granted, you will receive an email message confirming that your account has been validated.

Project Directors will be approved/validated by the AGA and all other applicant/grantee users will then be approved/validated by the organization's Project Director.

Applicant/Grantee Specific Process

First-time Applicant Organizations/New Organizations:

For applicant organizations that have not applied to a grant from the Affiliate in the past, they will also need to register their organization during the new user set up process.

When an applicant selects “Other” from the “Organization” drop down, the following form will automatically populate: The applicant will need to complete this form in its entirety.

The screenshot shows a web form titled "Organization" in a pink header. The form contains the following fields and controls:

- Organization Name:** A text input field with a red asterisk indicating it is required.
- Organization Type:** A dropdown menu with a blue arrow icon.
- Business Address:** A text input field with a red asterisk and a small icon of a house with a plus sign.
- City:** A text input field with a red asterisk.
- State:** A dropdown menu currently showing "Texas" with a blue arrow icon.
- Zip Code:** A text input field with a red asterisk and a small icon of a house with a plus sign.
- County:** A dropdown menu with a blue arrow icon.
- Phone #1:** A text input field with a red asterisk and a small icon of a house with a plus sign.
- Phone #2:** A text input field.
- Fax:** A text input field.
- Cell Phone:** A text input field.
- Do you have a Federal Tax ID Number?:** Radio buttons for "Yes" and "No".
- Federal Tax ID:** A text input field with a small icon of a house with a plus sign.
- Non-profit Documentation:** A text input field with a "Browse..." button and a small icon of a house with a plus sign.

The grantee will then click “Save” in the upper right hand corner to submit the registration.

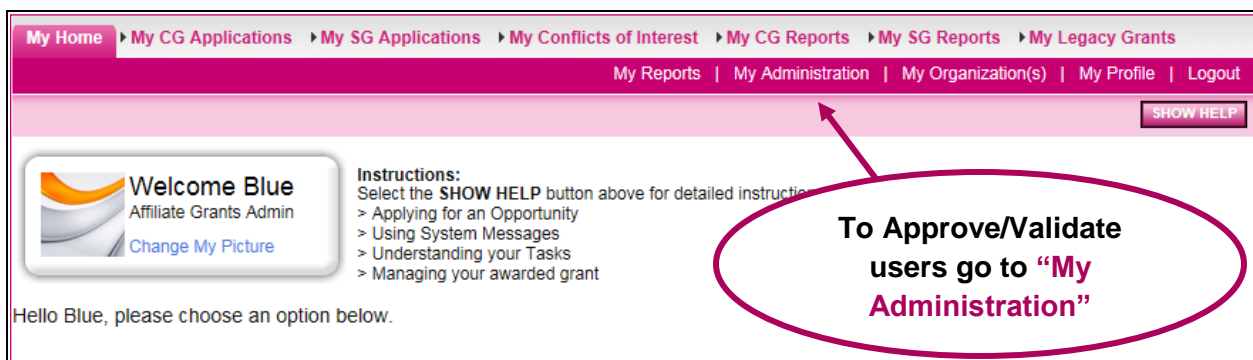
The AGA will then be able to log in to the system to approve both the new user and the new organization.

User Approval/Validation

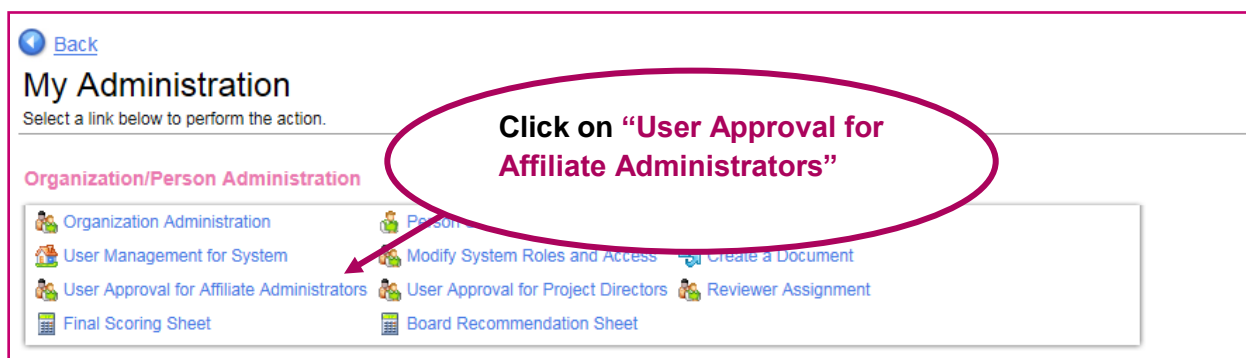
- Every user that registers must be approved.
- The Affiliate Grants Administrator (AGA) approves all Affiliate level users and each organization's Project Director.
- Each organization's Project Director approves other users within their own organization.

In order for users within an organization to be approved/validated, the AGA must follow the steps listed below.

- 1) The AGA will receive an email when a user within their organization or a Project Director has registered and needs to be validated.
- 2) The AGA logs in to GeMS and will select the “My Administration” tab at the top of the User Homepage.



- 3) Select the “User Approval for Affiliate Administrators” link within the My Administration section.



- 4) Once on the “**Komen User Approval**” Page enter the new registrants name in the search criteria. You could also search the system for “**New Users**” in the “**User Type**” field to perform a broader search. Select “**Search.**”

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

- 5) Select the checkbox next to the user’s name in the “**Search Results**” section.
- 6) Select “**Approval Type**”
- “**Approve User**” – user from an existing organization
 - “**Approve User and Organization**” - Project Director from a new organization
 - “**Deny**” – users that should not be granted access to GeMS
 - This commonly occurs when an applicant has selected the wrong Affiliate from the drop down menu
- 7) Assign the person’s organization to the appropriate organization.

If approving a Project Director from a **new organization** that has not applied in the past (**look for “True” under the new organization**), you will need to create an organization identifier/short name for “**Organization Identifier.**” See “Creating Organization Identifiers/Short Names” on page 126.

To approve the user select the record and click the button

Approval Type

Assign person's organization to

Organization Identifier (Leave blank if organization exists)

Set person's role to

Active Date

Inactive Date

Search Results

Export Results to Sort By

Name	New Organization	Requested Organization / Title	Contact Info	Phones
<input type="checkbox"/> Kravitz, Gina UserName: gkravitz Email: gina@yahoo.com Date Requested: 03/14/2011	False	Columbus Affiliate Title: Executive Director	929 Eastwind Drive Suite 211 Westerville, OH 43081 County: Franklin County	Phone 1: (614) 297-8154 Fax: (614) 297-8152
<input type="checkbox"/> Groves, Ansley UserName: amore Email: lgroves@komen.org Date Requested: 03/21/2011	True	University Title: Project Coordinator	1234 Komen Lane Lincoln, OH 123451234 County: Hocking County	Phone 1: 1234567890

- 8) Select a role for the user – AGM, Project Director, Reviewer, etc.
- 9) The current date will appear in the “Active Date” field. You do not have to enter anything into the “Inactive Date” field unless there is a date you would like the user’s access to be inactivated.
- 10) Select the “Approve Selected User” button to complete the user’s approval/validation.
- 11) The new user will receive an email notification when they have been approved and can now access GeMS.

To approve the user select the record and click the button

Approval Type: ← #6

Assign person's organization to: ← #7

Organization Identifier (Leave blank if organization exists):

Set person's role to: ← #8

Active Date:

Inactive Date:

← #1

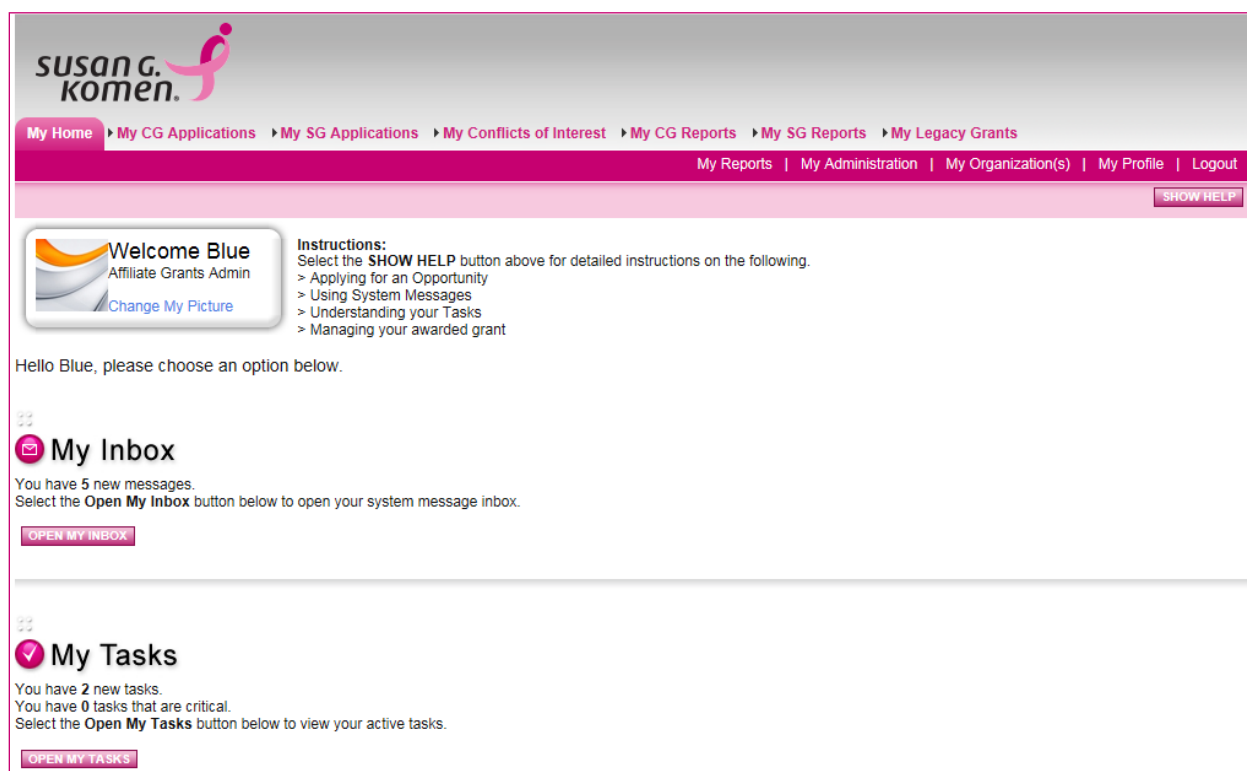
Search Results

Export Results to: Sort By: ASC

<input type="checkbox"/>	Name	New Organization	Requested Organization / Title	Contact Info	Phones
<input checked="" type="checkbox"/> ← #5	Doe, Jane UserName: janedoe1 Email: maurametcalfkelly@yahoo.com Date Requested: 10/13/2014	False	HQ002 test org Title: Authorized Signer	1236544 Street Dallas, TX 123654789 County: Rusk County	Phone 1: 1236547896

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 below.



User Tabs

- **My Home:** Brings the user back to their homepage
- **My CG Applications:** Access to all community grant applications, past and in progress
- **My SG Applications:** Access to all small grant applications, past and in progress
- **My Conflicts of Interest:** Access to all of your completed COI forms
- **My CG Reports:** Access to all community grant progress and final reports, past and in progress
- **My SG Reports:** Access to all small grant final reports, past and in progress
- **My Legacy Grants:** Access to all Affiliate grants before GeMS was utilized
- **My Reports:** Administrative and Data reports
- **My Administration:** Administrator functions, user approval; this tab will only appear for authorized users
- **My Organization:** Current information about your organization can be updated at any time by authorized users. *NOTE:* the address on the My Organization page for grantees is where grant checks will be mailed.
- **My Profile:** Individual user information (including passwords); this information can be updated at any time
- **Logout:** Logout of the system
- **My Inbox:** System notifications regarding system users and application status
- **My Tasks:** List of current applications that require attention

Helpful Hint:

When utilizing the task list or executing a search, always select the name of the application to enter the application forms (ex. [CGA-2012-HQ002-spec123-00001](#)). Selecting the Organization name is not a path to enter the application forms.

Automatic E-Mail Notifications

Automatic email notifications may be sent 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 an application while also serving as reminders when action is required on your part.

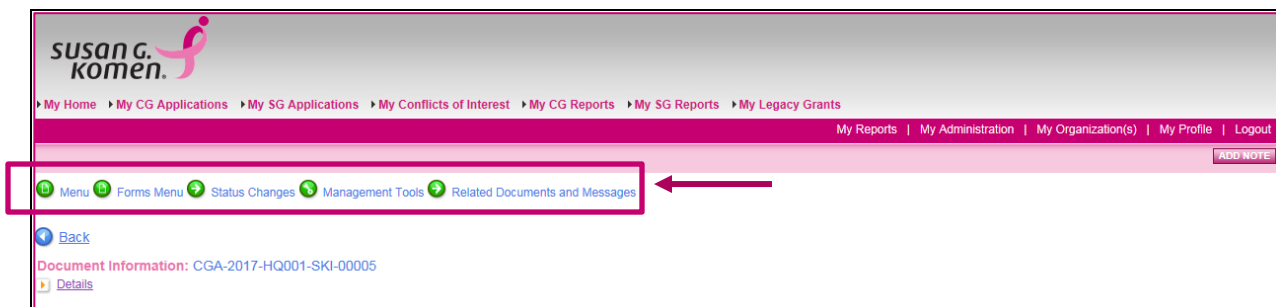
In order to receive these messages it is important you include an active, frequently used email address when creating your profile in the system. If you provide an incorrect email address or an address to an account that is either inactive or full, you will not be able to receive these important messages.

See Appendix B the text of automatic e-mail notifications sent from GeMS.

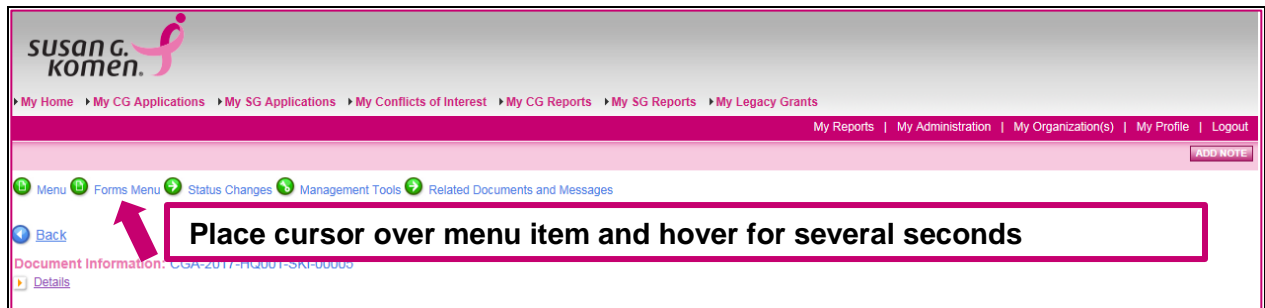
Enhanced Navigation

To access forms and features within an application requires hovering over the menu bar towards the top of the screen.

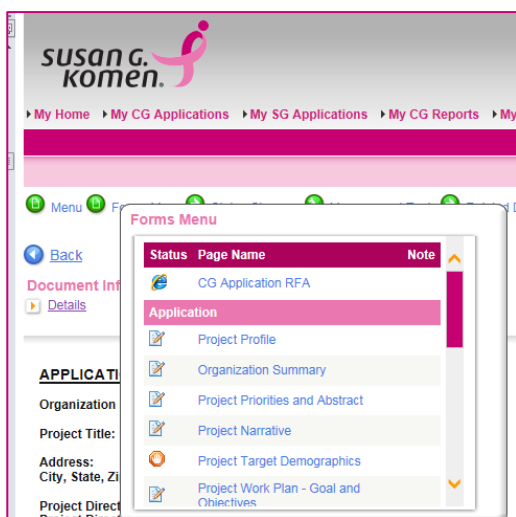
To hover over the item means to momentarily place your mouse icon over the selection and additional information will appear below.



For example, to access the forms menu, you would place the cursor (arrow) over the words “Forms Menu” for several seconds.



The forms menu will then appear



Initiating an Application

Grantee/Applicant Process Steps for Affiliate reference (see Applicant Guide for screenshots)

Some Affiliates offer both Community Grants and Small Grants and both granting opportunities may be available under “[View Available Proposals](#).” If this is the case, warn your applicants to be sure they initiate the correct grant application. Community Grants are designated as “[CG](#)” and Small Grants as “[SG](#).”

In order to create an application, follow these steps:

- 1) From the User Homepage, click the “[View Opportunities](#)” button under the “[View Available Proposals](#)” section on the main menu. This section will show the Project Director all of the grant program types where they may apply for a new grant.
- 2) For those grant programs where an organization is eligible to apply, the Project Director will see an “[Apply Now](#)” button under the description of the grant. Click the “[Apply Now](#)” button for the appropriate granting opportunity.
- 3) A confirmation page will appear. By clicking the “[I Agree](#)” button, the Project Director will initiate a new application. An application will be created and they will be taken to the “[Application Snapshot](#)” where they can begin filling out the various sections of the application.

Accessing an Application through My CG Application

To access an application if you do not have an associated task, users must select the “My CG Applications” tab to view/edit/complete applications.

- 1) User selects “My CG Applications.
- 2) Search for the application via the various fields. We suggest using the “Status” field and selecting the appropriate status 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) Click on the name of the grant application you would like to access for viewing/editing/ completion from the “Results” section. The application name will be a hyperlink in blue and start with CGA (ex. [CGA-2013-HQ002-spec123-00001](#))

Results					
Document Type	Organization	Name	Current Status	Year	No Cost Extension
CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00021	Grant Awarded	2017	No
CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00022	Application In Progress	2017	No

Helpful Hint:

To initiate a **new** or additional application, applicants click on “View Available Proposals.”

To view/edit/complete an application **already in progress**, applicants click the “My CG Applications Tab.”

Application Snapshot

The Application Snapshot page is the homepage for each application. It provides key information for the application and is completed as the application moves through the statuses.

The screenshot shows the 'Application Snapshot' page for the application 'CGA-2017-HQ001-KOMEN-00021 (2)'. The page includes a navigation bar with links like 'My Home', 'My CG Applications', and 'My SG Applications'. Below the navigation bar, there are links for 'Menu', 'Forms Menu', 'Status Changes', 'Management Tools', and 'Related Documents and Messages'. The 'Document Information' section shows the application name 'CGA-2017-HQ001-KOMEN-00021 (2)' and a 'Details' link. The 'APPLICATION SNAPSHOT' section contains a table of application details with annotations explaining their sources:

Organization Name:	KOMEN Test Org 1	Imported from "My Organization(s)"
Project Title:	Patient Navigation	Imported from the "Project Profile" page
Address: City, State, Zip:	1234 Looney Tunes Way Dallas, Texas 12345	Imported from "My Organization(s)"
Project Director: Project Director Email:	Daisy Duck ncopple@komen.org	Project Director/ Authorized Signer attached to the application
Authorized Signer: Authorized Signer Email:	Daffy Duck ncopple@komen.org	
Requested Amount:	\$100,200.00	Imported from the Application's Project Profile page
Award Amount:	\$100,200.00	Will populate once grant is changed to "Grant Awarded"
Payments Processed:	\$100,200.00	
Application Status:	Amendment Submitted	Application's current status
<u>Related Documents and Status</u> CGPR-2017-HQ001-KOMEN-00015 - Payment Processed		Progress and Final Reports associated with application

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.

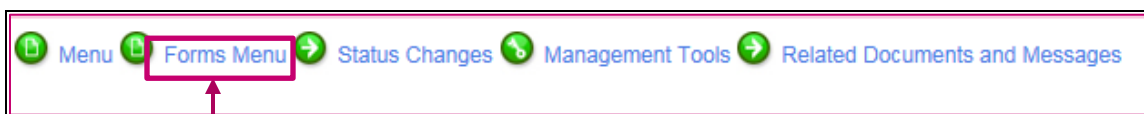
The CG Application Menu

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

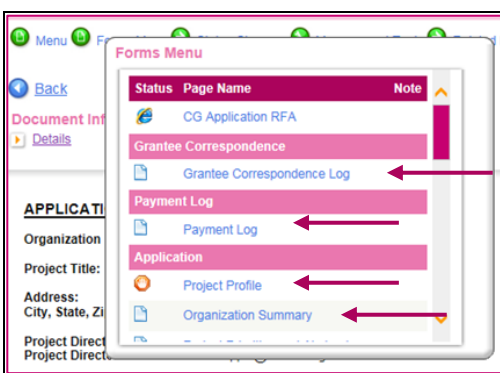
Forms Menu

The “Forms Menu” contains all of the forms associated with the application. To view the application forms:

- 1) Hover over “Forms Menu.”



- 2) Click on the name of the form you wish to view/edit/complete.



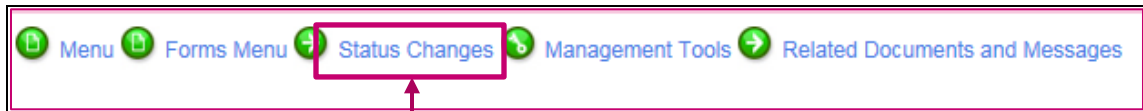
If you need to see a listing of the when a page was last modified, click on the “Forms Menu” and you will see a complete listing of the pages and the dates they were initially and last saved and by which user.

Application		
	Project Profile	Grant System 5/25/2017 3:10:01 PM Daisy Duck 6/5/2017 3:23:12 PM
	Organization Summary	Daisy Duck 5/30/2017 4:18:24 PM
	Project Priorities and Abstract	Daisy Duck 5/30/2017 4:19:58 PM
	Project Narrative	Daisy Duck 5/30/2017 4:20:43 PM
	Project Target Demographics	Daisy Duck 5/30/2017 4:23:59 PM
	Project Work Plan - Goal and Objectives	Daisy Duck 5/30/2017 4:25:24 PM Daisy Duck 5/30/2017 4:25:57 PM
	Project Work Plan Summary	
	Key Personnel/Salaries	Daisy Duck 5/30/2017 4:27:37 PM Daisy Duck 5/30/2017 4:27:58 PM
	Consultants/Sub-Contracts	Daisy Duck 5/30/2017 4:28:48 PM
	Supplies	Daisy Duck 5/30/2017 4:56:43 PM
	Travel	
	Patient Care	
	Other	
	Indirect Cost	
	Project Budget Summary	Daisy Duck 5/30/2017 4:29:31 PM Daisy Duck 5/30/2017 4:31:33 PM

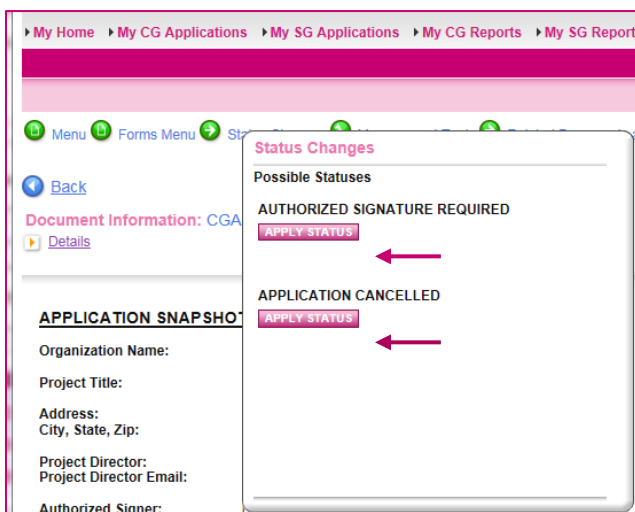
Status Changes

The “**Status Changes**” section allows the AGA, AGM, Project Director, and Authorized Signer to change the status of an application or report. Status options are dependent on the current status of the document and the role of the user. **Certain GeMS features may not be available until the application is in the appropriate status.** When it is time to change the status of the application:

- 1) Hover over the “**Status Changes.**”



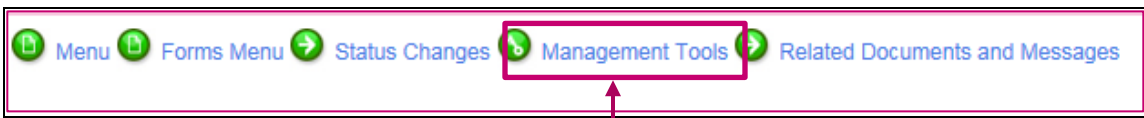
- 2) Click the “**Apply Status**” button under the appropriate status.













Management Tools

The “**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 user role.

- 1) Hover over the “**Management Tools.**”



- 2) Click on the appropriate option.

Management Tools
 **CREATE FULL PRINT VERSION**
Select the link above to create a printable version of the document.
 **CREATE FULL BLANK PRINT VERSION**
Select the link above to create a blank printable version of the document.
 **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.
 **MY ACTIVITIES SEARCH/REPORTS**
Select the link above to perform a search and output the results from the My Activities.
 **STATUS HISTORY**
Select the link above to view the status history of this document.
 **CHECK FOR ERRORS**
Select the link above to check the entire document for errors.
 **DATE MODIFICATION**
Select the link above to change the dates associated with this document such as its due date.
 **VIEW MODIFICATION HISTORY**
Select the link above to view various modifications that people have made to specific pages in the document.
 **MANAGE REVIEW PROCESS**
Select the link above to view review information for the document.
 **ATTACHMENT REPOSITORY**
Select the link above to view all attachments in this document.

Add/Edit People

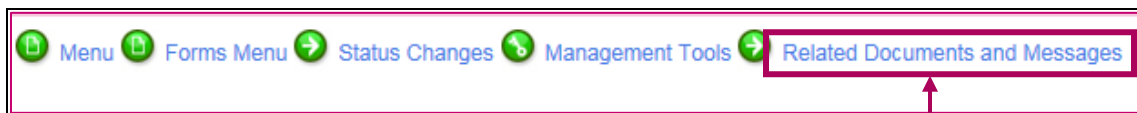
As new users are approved for access to the system, they will automatically be added to applications and reports that are initiated after their approval.

They are automatically added to existing and historical applications and reports.

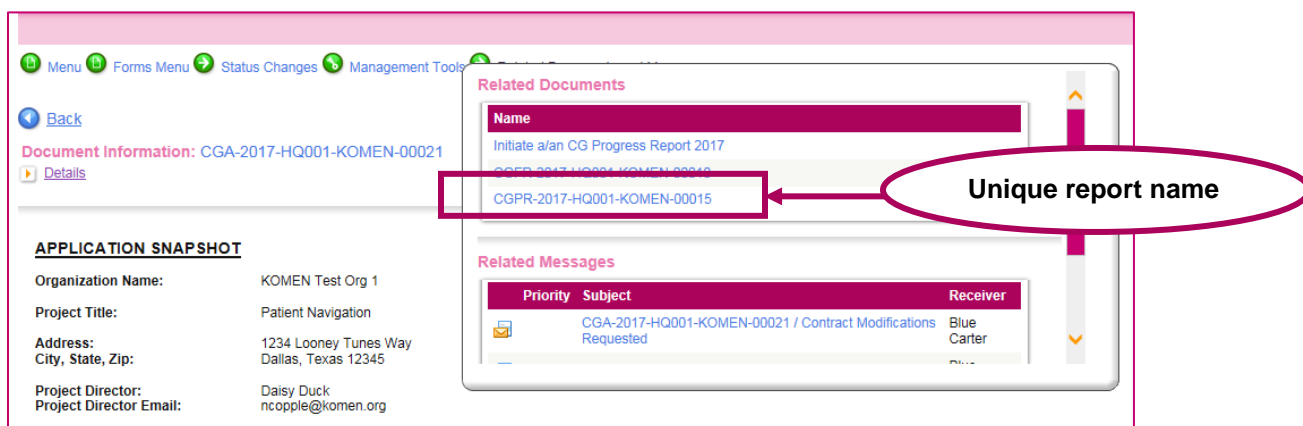
Related Documents and Messages (Progress & Final Reports)

The “Related Documents and Messages” section is where you will find items related to an application or grant. Related Items include Progress and Final Reports as well as any automatic messages sent regarding the grant.

- 1) Hover over the “Related Documents and Messages.”



- 2) Click on report name in blue to access the report (ex. [CGPR-2016-XXXXX-XXX-XXXXX](#))



Application Completion

If you hover over the “Forms Menu” option on the CG Application Menu, the various pages of the application are displayed. These are the forms the applicant **MUST** complete before the application can be submitted. On any of the application pages, you can access the list to move to a different page.

Forms Completion

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

Helpful Hint:

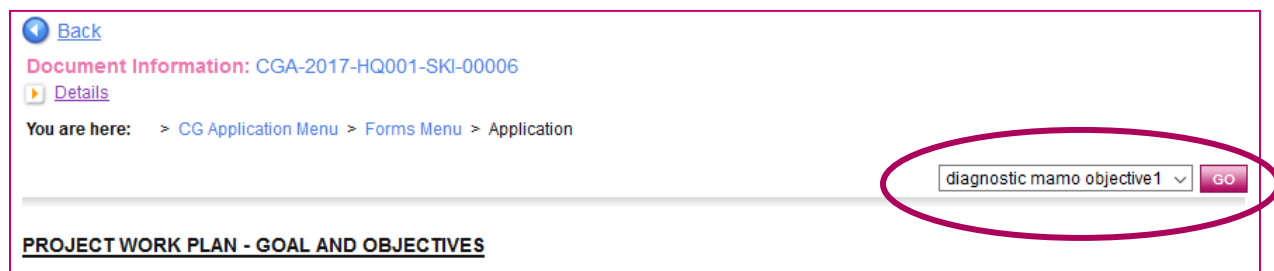
Applicants should refer to the Affiliate’s Request for Applications (RFA) for specific information related to the various forms and required information associated with the Grant Application.

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 – Goal and Objectives, for example, will typically consist of more than one item. Any form that has an “Add” button allows the applicant 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 and the applicant can choose among 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 the applicant.

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 	Hourly Rate	# of Hours	Total
Jon Sol	Test Affiliate	20	5	
Jane Doe	Test Affiliate	30	3	
Amy Joe	Test Affiliate	50	4	
Save has NOT been selected – no totals appear				Totals:

Name of Consultant	Agency Affiliation 	Hourly Rate	# of Hours	Total
Jon Sol	Test Affiliate	\$20	5	\$100
Jane Doe	Test Affiliate	\$30	3	\$90
Amy Joe	Test Affiliate	\$50	4	\$200
Save HAS been selected – totals appear				Totals: \$390

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

From Other Sources				
	Requested from Komen	Cash	In Kind	Total Required
Salaries and Fringe	\$345,000	\$100	\$202	\$345,302
Consultants/Subcontracts	\$6,300	\$101	\$203	\$6,604
Supplies	\$720	\$102	\$204	\$1,026
Travel	\$900	\$103	\$205	\$1,208
Patient Care Costs				
Screening	\$2,150	\$104	\$206	\$2,460
Diagnostics	\$2,450	\$105	\$207	\$2,762
Treatment	\$8,900	\$106	\$208	\$9,214
Transportation	\$250	\$107	\$209	\$566
Other	\$650	\$108	\$210	\$968
Subtotal – Direct Costs	\$367,320	\$936	\$1,854	\$370,110
Indirect Costs	\$91,800	\$109	\$211	\$92,120
Total:	\$459,120	\$1,045	\$2,065	\$462,230

Error Messages

If any required field is not completed within an application 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 the application, you will receive an error message. **The GeMS system will require the errors be fixed before the application submission can be completed.** See the example below.

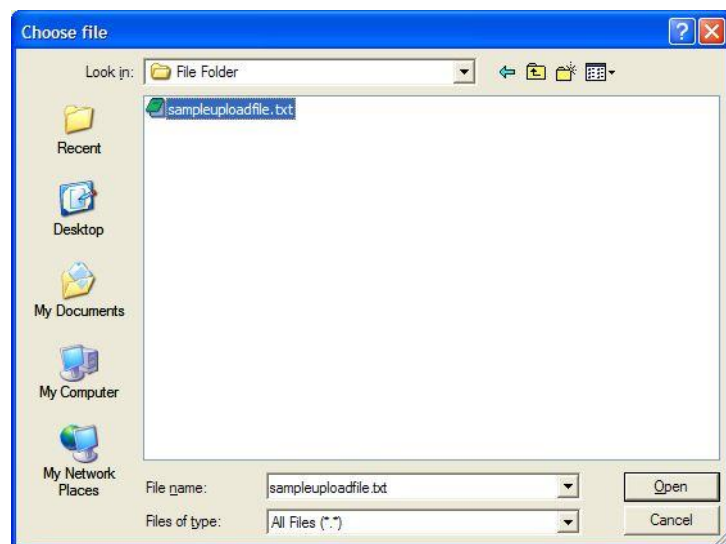


Uploads & Attachments

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.

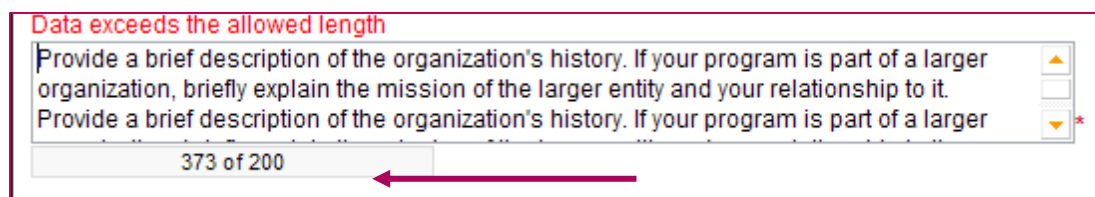


Copy and Paste

Users 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

Applicants 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.



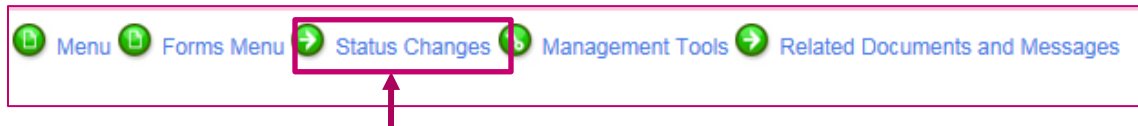
Helpful Tip:

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.

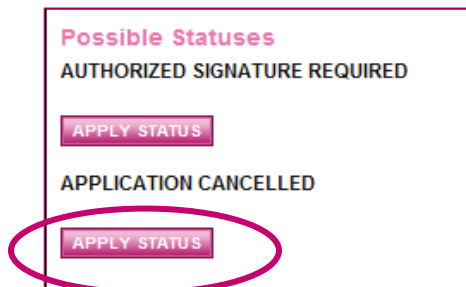
Application Cancelled

At any point in the application process a Project Director or Authorized Signer can cancel an application. We recommend you do this if you initiate more than one application in error.

- 1) Project Director or Authorized Signer navigates to the appropriate application in “Application in Progress Status.”
- 2) Hover over “Status Changes” to see the possible statuses.



- 3) Click “Apply Status” under “Application Cancelled.”



Application Submission

Grantee/Applicant Process Steps for Affiliate reference (see Applicant Guide for screenshots)

The **Project Director** must change the status of the application to “**Authorized Signature Required**” to begin the application submission process. Only the Project Director can complete this status change.

After the Project Director has changed the Application status, the **Authorized Signer** must finalize the submission by changing the status to “**Application Submitted.**”

Only the Authorized Signer can complete this status change.

Once an application is submitted it will enter into a read-only status and cannot be changed!

- 1) **Project Director** logs in and clicks “**Open My Tasks**” under “**My Tasks.**”
- 2) Select the grant they would like to submit from the task list.
- 3) Hover over “**Status Changes**” to see the possible statuses.
- 4) Click “**Apply Status**” under the appropriate status.

If any **errors** exist on any of the application’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 an application 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.*

- 5) **Authorized Signer** logs in to GeMS and clicks “**Open My Tasks**” under “**My Tasks.**”
- 6) Select the grant they would like to submit from the task list.
- 7) Hover over “**Status Changes**” to see the possible statuses.
- 8) Click “**Apply Status**” for “**Application Submitted.**”

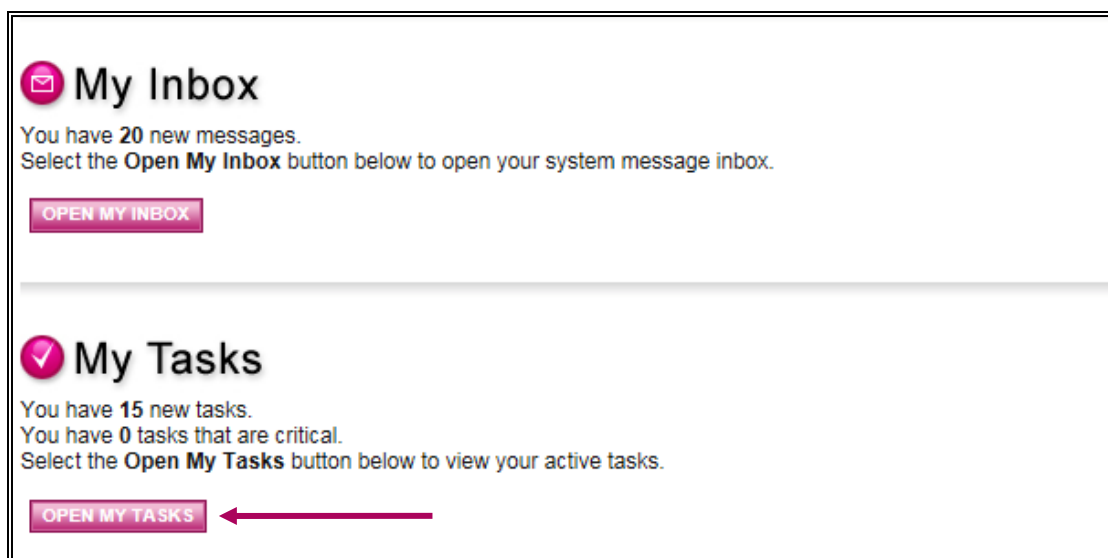
Helpful Tip: If an Authorized Signer accidentally changes the status to “**Application Cancelled,**” the AGA can push the status back to “**Authorized Signature Required**” using the “**Status Push Documents**” function under “**My Administration**” (see page 53).

Conflicts of Interest (COI) Approval

Validating Conflicts of Interest

- All Affiliate user roles, except the COI Approver should complete the Conflict of Interest form during registration.
- Only the COI Approver can validate Conflicts of Interest.
- The COI Approver is appointed by the Board of Directors and is the individual at the Affiliate with the authority to accept or decline various Conflicts of Interest related to the grantmaking process.
- If an Affiliate user is serving as both the COI Approver and another role (for example AGA) that user will have two separate GeMS logins to fulfill their duties.

- 1) **COI Approver** logs into GeMS.
- 2) All Conflicts of Interest that need to be approved will be available under “**My Tasks**” on the Conflicts of Interest Homepage.



- 3) Selecting the name on the “**My Tasks**” list will take the COI Approver to the document needing validation.

My Tasks


Export Results to: Sort by:

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Conflict of Interest	HQ002 test org	COI-HQ001-spec123-00442	COI Verification Required	9/15/2015	
	Conflict of Interest	HQ002 test org	COI-HQ001-spec123-00444	COI Verification Required	9/15/2015	
	Conflict of Interest	HQ002 test org	COI-HQ001-spec123-00445	COI Verification Required	9/15/2015	

- a) A second method to locating conflicts of interest that need to be approved is through the “**My Conflicts of Interest**” tab at the top of the page on the left side. If you select this tab you will be able to search for all Conflicts of Interest for the Affiliate.

My Home ▶ **My Conflicts of Interest** ←

My Organization(s) | My Profile | Logout



Welcome Test
COI Approver
[Change My Picture](#)

Instructions:
Select the **SHOW HELP** button above for detailed instructions on the following.

- > Applying for an Opportunity
- > Using System Messages
- > Understanding your Tasks
- > Managing your awarded grant

Hello Test, please choose an option below.

- b) You can search by the person’s name, or by the status of the Conflicts of Interest form. To approve a COI, search by “**Conflict of Interest: COI Verification Required.**”

[Back](#)

KOMEN Document Tab Search - COI

For more detailed instructions, select the **Show Help** button.

COI Types

COI Name

Person

Status ←

Organization

Year

Click **Execute once selections are made**

Available COI Statuses are:

- **COI Updates in Progress** – the user is working to update the COI form, this process occurs annually for reviewers
- **COI Verification Required** – the user has submitted their COI form and it needs to be reviewed by the COI Approver
- **COI Verified** – the COI Approver has validated this conflict of interest

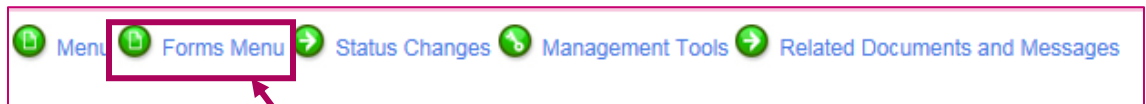
- c) Once the search is complete, you click on the name of the COI form you want to validate. (ex. COI-HQ001-XXXX-XXXXX).

Results

Document Type	Organization	Name	Current Status	Year
Conflict of Interest	HQ002 test org	COI-HQ001-spec123-00442	COI Verification Required	2011
Conflict of Interest	HQ002 test org	COI-HQ001-spec123-00443	COI Updates In Process	2011
Conflict of Interest	HQ002 test org	COI-HQ001-spec123-00444	COI Verification Required	2011
Conflict of Interest	HQ002 test org	COI-HQ001-spec123-00445	COI Verification Required	2011

1

- 4) Once you make your selection you will be taken to that individual's Conflict of Interest menu. To complete the approval process, hover over "Forms Menu."



- 5) Click on the "Conflict of Interest Declaration" link to view the declared conflicts.

Conflict of Interest Menu - Forms
Please complete all required forms below.

Document Information: COI-HQ001-spec123-00444
[Details](#)

Forms

Status	Page Name	Note	Created By	Last Modified By
	Conflict of Interest Declaration		Grant System	9/15/2015 12:10:43 PM

- 6) The COI Approver will now review the declared conflicts and establish if they are indeed conflicts. Select either “COI” or “No COI” and **include notes** on why they selected “COI” or “No COI.” Once that is complete, select the save button in the top right hand side.

[Back](#)

Document Information: COI-HQ001-spec123-00442

[Details](#)

You are here: > [Conflict of Interest Menu](#) > [Forms Menu](#)

09/15/2015

CONFLICT OF INTEREST DECLARATION

Conflict of Interest Declaration Guidelines:

Name: Reviewer Test Org
Organization: HQ002 test org
Date: 09/15/2015 *
Affiliate: Special Grants
Conflict of Interest? ☒ Yes ☐ No

Organization	Notes
Montrose Clinic/Montrose Counseling Center	Served as a volunteer in their call center from 2005-2010
University of Houston	Brother in law worked here in the 1990s.

Affiliate Notes

Both of these activities occurred more than five years in the past. The brother in law reference is more than 20 years old. Serving an organization as a call center employee seems to be a low level of engagement.

Please note: you must scroll to the right of the page to select “COI” or “No COI.” These selections are to the right of the “Notes” lines.

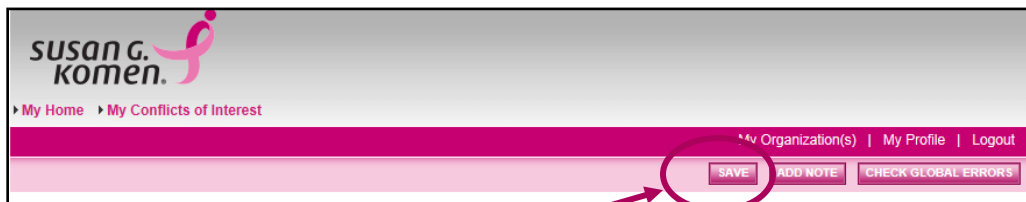
Notes

	<input type="radio"/> COI <input type="radio"/> No COI
	<input type="radio"/> COI <input type="radio"/> No COI
	<input type="radio"/> COI <input type="radio"/> No COI

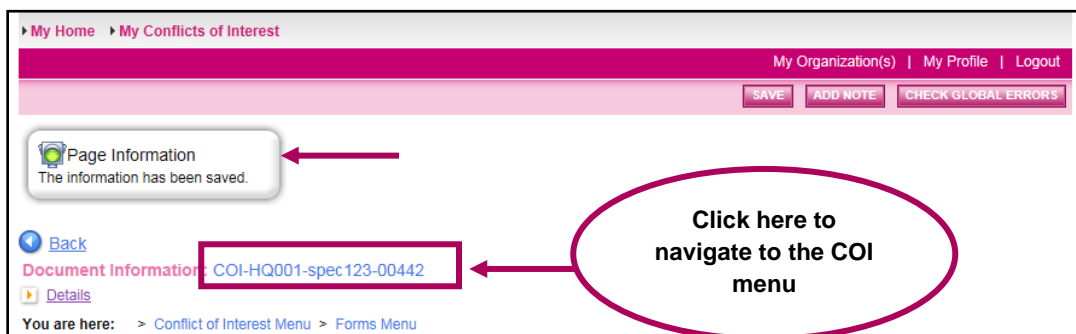
The COI Approver selection of “COI” or “No COI” is the determining factor if a reviewer has a conflict of interest. While a reviewer may declare they have a conflict (basically identifying an existing relationship with an organization), the COI Approver may determine that this relationship is not a conflict as it relates to the grant review process and classify this as “No COI.”

The COI Approver's notes under "Affiliate Notes" are critical to helping the Affiliate track the COI Approval process and maintain detailed record-keeping for the rationale behind COI decisions. The user can view the notes left by the COI Approver regarding their conflicts.

- 7) Once the COI Approver has selected “COI” or “No COI” and made notes in the Affiliate notes section and have finalized their decisions, click “Save.”

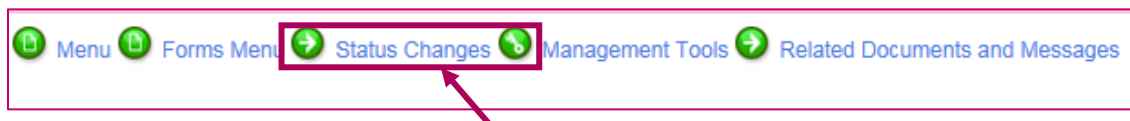


- 8) The COI Approver will receive confirmation that the information has been successfully saved.

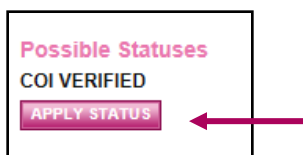


Once the COI Approver has received confirmation that the COI has been saved, they will need to change the status from “COI Verification Required” to “COI Verified.”

- 9) Begin this process by clicking on the COI name (ex. [COI-HQ001-spec123-00442](#)) to return to the COI Menu.
- 10) Hover over “Status Options.”



- 11) Click on “Apply Status” under COI Verified.

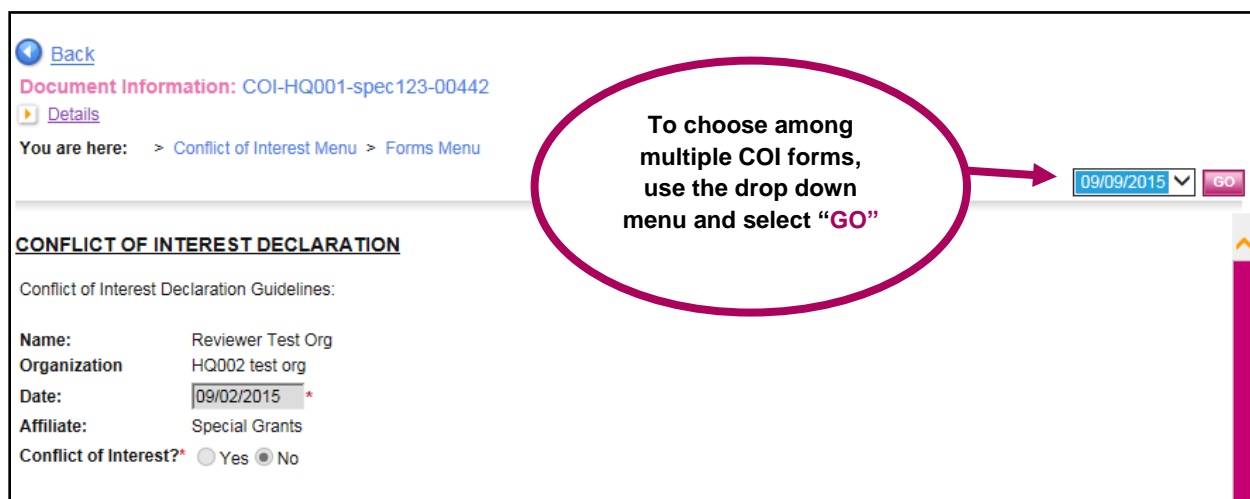


Returning Reviewers COI – COI Approver Process

Returning reviewers will have a COI form for each year they have served the Affiliate.

To select the appropriate COI, they can view the forms in the system by using the drop down menu and selecting “GO.”

Look for the most recent date to find the form in need of approval. Once the most recent form has been selected, follow the steps beginning on page 34.



The screenshot shows a web interface for a Conflict of Interest (COI) declaration. At the top, there is a 'Back' link and 'Document Information: COI-HQ001-spec123-00442'. Below this is a 'Details' link and a breadcrumb trail: 'You are here: > Conflict of Interest Menu > Forms Menu'. The main heading is 'CONFLICT OF INTEREST DECLARATION'. Underneath is a section for 'Conflict of Interest Declaration Guidelines:'. The form fields are as follows:

- Name: Reviewer Test Org
- Organization: HQ002 test org
- Date: 09/02/2015 *
- Affiliate: Special Grants
- Conflict of Interest? * ☐ Yes ☒ No

A callout box with a pink border and arrow points to the date dropdown menu, which currently shows '09/09/2015' and a 'GO' button next to it. The text inside the callout box reads: 'To choose among multiple COI forms, use the drop down menu and select “GO”'.

Returning Reviewer COI – AGA Process

Returning reviewers will need to complete an updated COI each year they participate in the review process. Below will outline the steps the AGA must take before the reviewer can update their COI.

The following steps should be completed prior to the Review Panel Orientation meeting!

Before a returning reviewer can begin the process of updating their COI form, the status of the COI form must be “COI Updates in Progress.”

The AGA will need to follow these steps to prepare the COI forms for returning reviewers.

- 1) Login to GeMS
- 2) Click on the “My Reports” link at the top of the page
- 3) Click on the “COI Decoder” report

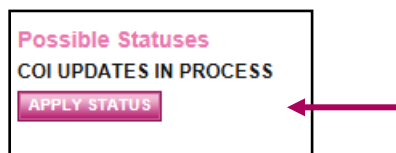
- 4) Chose how you would like to export the results and select “Execute.” It is suggested you export to Excel so you can easily complete the next steps.

Example of results:

Document	Current Status	Reviewer	Affiliate	Organization	Date	COI
COI-HQ001-00288	COI Updates In Progress	Mr. Daniel Fischer	KOMEN	KOMEN	02/01/2012	No
COI-HQ001-HQ001-00439	COI Verification Required	Bryan Criswell	KOMEN	KOMEN	01/12/2015	No
COI-HQ001-HQ001*-00447	COI Verified	Nicole Copple	KOMEN	KOMEN	7/13/2015	No

- 5) Click on the “My Organization(s)” link at the top of the page.
- 6) Click on the “Organization Documents” link.

- 7) Locate each reviewer's COI Form and click on the link (COI-XXXX-XXXX).
- 8) Once on the COI Snapshot, hover over "Status Changes."
- 9) Click "Apply Status" under "COI Updates in Process." Returning reviewers will now be automatically redirected to update their COI form the next time they login to GeMS.



Some Affiliates inactivate reviewers at the end of the grant cycle in order to prevent them from accessing the system once the review process is complete. If your Affiliate follows this practice and has a returning reviewer, in addition to reactivating the reviewer's access to GeMS, you will also need to reactivate the reviewer on their COI form.

To do this, you will navigate to the appropriate COI form > Click "View Management Tools" under "Access Management Tools" > Click "Add/Edit People" > Delete the end date under "Active Date" > click "Save"

If a returning reviewer is reporting to you that they cannot access their COI form – this is most likely the reason.

<input checked="" type="checkbox"/>	Vicente Fernandez Email	KOMEN (Reviewer)	Reviewer	6/26/2014 12/3/2015	Grant System
-------------------------------------	-------------------------------	------------------	----------	------------------------	-----------------

Delete this date and click "Save"

Returning Reviewers – "COI Verification Required"

For COI forms of returning reviewers in the status of "COI Verification Required" follow the steps below to ensure that the Affiliate's current COI Approver is attached to the COI form. This means that the status of the COI form was never changed to "COI Verified" the previous year.

This step is necessary since your Affiliate may have a new COI Approver for the current grant year, and the COI Approver would not automatically be added to have access to the document.

- 1) Click through each COI Form that is in the status "COI Verification Required." (Click on the COI name COI-XXXX-XXXX-XXXXX)
- 2) Once you are directed to each form's COI Menu, click on the "Management Tools" link.
- 3) Click the "Add/Edit People" link.
- 4) Make sure the COI Approver's name has a check in the check-box next to it. This ensures the COI Approver is attached to that specific COI form.
- 5) Click "Save" if you have made any changes.
- 6) Now that the AGA has ensured that the COI Approver is attached to the documents needing verification, **the AGA should communicate with the COI Approver that there are COI forms in need of their validation.**
- 7) The COI approver will follow the steps outlined on pages 34 – 38 to ensure that all COIs have been validated and the statuses are changed to "COI Verified."
- 8) Once the COI form is in the status of "COI Verified" the AGA can complete the steps on the previous page to prepare the form for the current grant year.

Note: All COI forms in GeMS will be attached to the year 2011, regardless of the year they were created. So the COI of a new reviewer in 2017 will still show 2011. This is because the original COI template was created in 2011.

Results				
Document Type	Organization	Name	Current Status	Year
Conflict of Interest	HQ002 test org	COI-HQ001-spec123-00442	COI Verification Required →	2011
Conflict of Interest	HQ002 test org	COI-HQ001-spec123-00443	COI Updates In Process →	2011

Returning Reviewers – COI Update

Reviewer Process Steps for Affiliate reference (see Reviewer Guide for screenshots)

Note: If the Affiliate has already changed the status for the returning reviewers to “COI Updates in Process,” reviewers can skip steps #2 to #7.

- 1) Log into your GeMS Reviewer account: <https://affiliategrants.komen.org>.
- 2) Once on the User Homepage, click on the "My Conflicts of Interest" tab at the top of the screen.
- 3) Once on the search menu, simply hit the “Execute” button in the upper right hand corner without making any selections in the drop down boxes. This should bring up the Conflict of Interest (COI) form.
- 4) Click the COI Form ([COI-XXXXXX-XXXXX-XXXXX](#) link highlighted in blue) and that will take you to the COI Snapshot.
- 5) Hover over “Status Changes.”
- 6) Select “Apply Status” under “COI Updates in Process.” The Conflict of Interest Menu will appear.
- 7) Hover over “Forms Menu.”
- 8) Select “Conflict of Interest Declaration.”
- 9) Select the “ADD” button (toward the top right of screen) to create a new COI form for the current year.
- 10) Once the new form loads, update the required information appropriately and click the “SAVE” button in the pink bar near the top of the page.
- 11) Once the information is saved, click the Document Information link ([COI-XXXXXX-XXXXX-XXXXX](#) link highlighted in blue) to be directed back to the COI Menu.
- 12) Hover over “Status Changes.”
- 13) Select “Apply Status” under “COI Verification Required.”
- 14) Once these steps are completed, an Affiliate representative will approve your declared conflicts and assign grant applications accordingly.

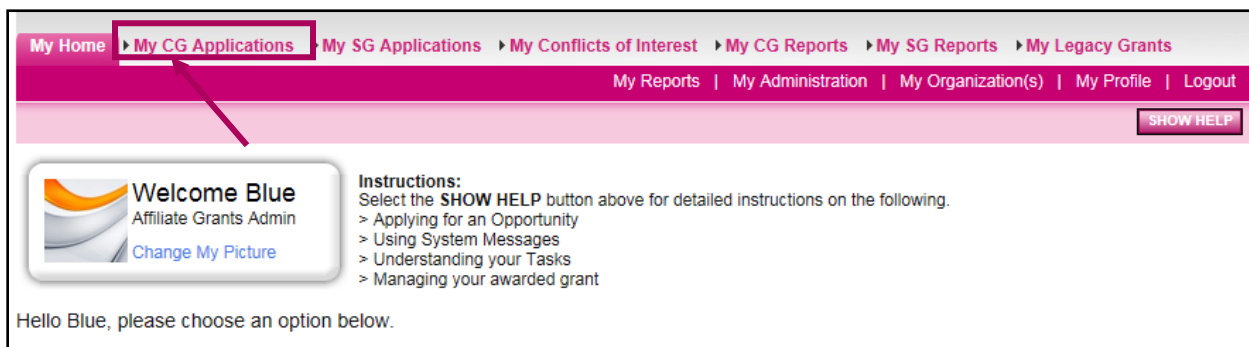
Review Process

Stages of the Review Process:

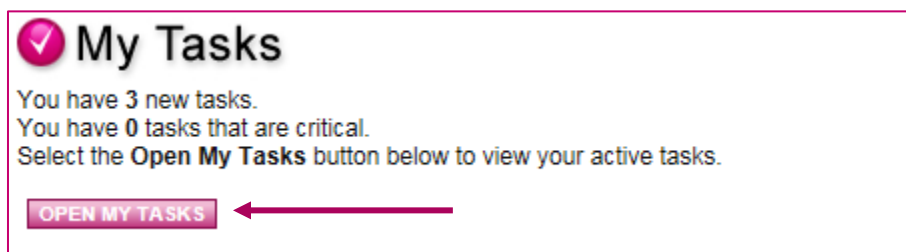
- 1) Compliance Checklist
- 2) Reviewer Assignment
- 3) Reviewing the Application
- 4) Completing the Review Process

Compliance Checklist

- 1) The AGA will login and click the “My CG Applications” tab at the top of the page.



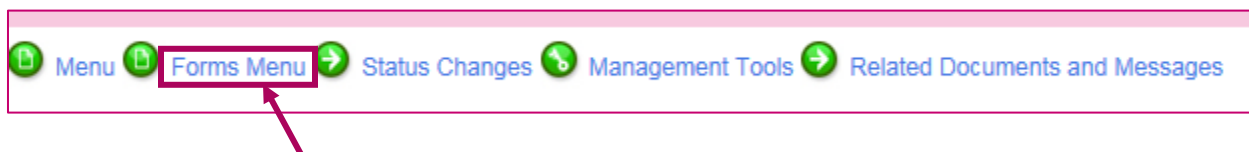
- 2) Click on “Open My Tasks” under “My Tasks.”



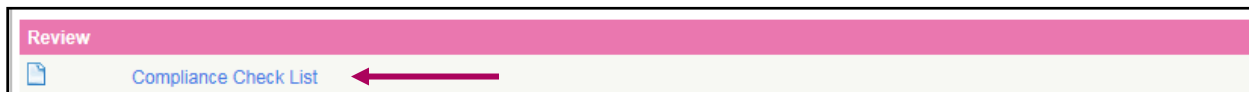
- 3) Select the application name for the application you would like to review for compliance.

Info	Document Type	Organization	Name	Current Status	Date Received
	CG Progress Report	Aspen Ski Lodge	CGPR-2016-HQ001-SKI-00001	Progress Report Approved	9/16/2016
	CG Application	Aspen Ski Lodge	CGA-2015-CO102-SKI-00001	Amendment Submitted	5/11/2017
	CG Application	Aspen Ski Lodge	CGA-2018-CO102-SKI-00001	Application Submitted	8/4/2017

- 4) Hover over “Forms Menu.”



- 5) On the Forms Menu, select the “**Compliance Check List**” page.

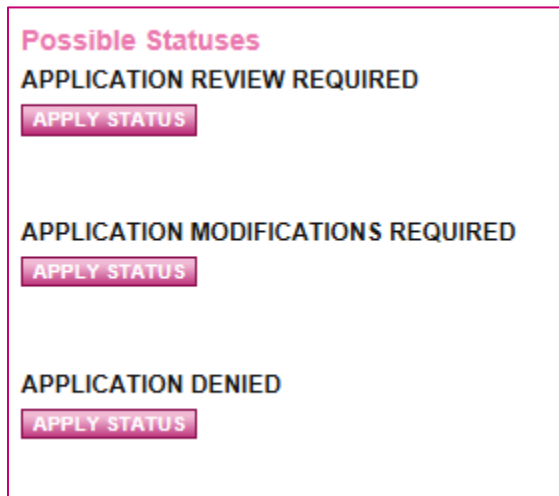
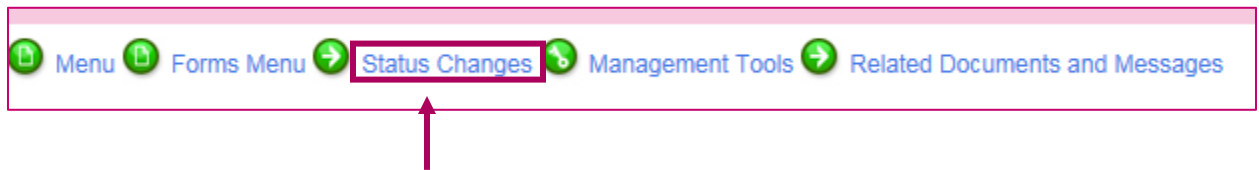


- 6) The AGA will complete the “**Compliance Check List.**” If there are any compliance issues, the notes section should be completed.

COMPLIANCE CHECK LIST		
<p>The compliance checklist is used to identify major and minor compliance issues with submitted applications. Applications with major compliance issues do not progress to reviewers to be evaluated, ranked, and scored.</p> <p>Applications with minor compliance issues should be returned to the applicant to make the necessary modifications in GeMS.</p>		
Major Compliance Issues:	Compliant/Verified:	Notes:
Application received by deadline?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
Applicant meets all eligibility requirements in RFA?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
If previous grantee, Applicant is In Good Standing?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
Minor Compliance Issues:		
Objectives are SMART?	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
Project does not request funding for breast self exams or use of breast models?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
Project does not request funding for health fairs?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
All requested documentation has been submitted?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
Prohibited budget items are not included?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
Indirect costs do not exceed allowable rate?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
Budget justification provided for all requested costs?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
Status:		
Acceptable for Review Panel	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
Applicant to Modify	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
Decline	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>

- 7) Once the application has been reviewed for compliance, the AGA will change the status to:
- **Application Review Required** – application meets the terms outlined in the RFA, all required documentation is attached, application can progress to the review panel.
 - **Application Modifications Required** – applicant must make adjustments to content or submit additional documentation in order for the application to be compliant.
 - **Application Denied** - application has major compliance issues and the Affiliate does not approve for this application to go to peer review.

a) Hover over “Status Changes.”



b) Select “Apply Status” under the appropriate status.

- When asking applicants to edit their applications for compliance, the Affiliate should communicate the changes that need to be made to specific sections or pages in GeMS.
- The more detail the Affiliate provides, the more quickly compliance issues will be resolved.

Once the grantee resubmits the application, the Affiliate will repeat the steps listed above to review the application for compliance.

Application Revision

Grantee/Applicant Process Steps for Affiliate reference (see Applicant Guide for screenshots)

If an organization is required to make revisions to the application before the application can be presented to the review panel, the applicant should follow these steps:

- 1) **Project Director** will log into GeMS.
- 2) From the “**User Homepage**” and click “**Open My Tasks**” under “**My Tasks.**”
- 3) Select the application name for the project in which revisions are required.
- 4) Hover over “**Forms Menu**” and update each form that the Affiliate has requested revisions to.
- 5) Once all revisions are completed, hover over “**Status Changes**” and select the “**Apply Status**” button under the appropriate status.
- 6) The **Authorized Signer** logs in to GeMS and clicks the “**Open My Tasks**” button under “**My Tasks.**”
- 7) Select the name of the application for which they would like to submit from the “**My Tasks**” list.
- 8) Confirm changes have been made to the appropriate sections of the application by hovering over the “**Forms Menu**” and selecting the appropriate pages.
- 9) Hover over “**Status Changes**” and select the “**Apply Status**” button under the appropriate status.

Once the application is in “**Application Modifications Submitted**” status:

- The changes need to be reviewed and approved by the Affiliate.
- The Affiliate will then change the application status to “**Application Review Required**”, “**Application Denied**” or “**Application Modifications Required**” if additional changes must be made.

Reviewer Assignment

The AGA is the only Affiliate user that can manage the review process in GeMS.

Do **NOT** use Mozilla Firefox as your internet browser during Reviewer Assignment! This is the only process in GeMS that is not compatible with Firefox.

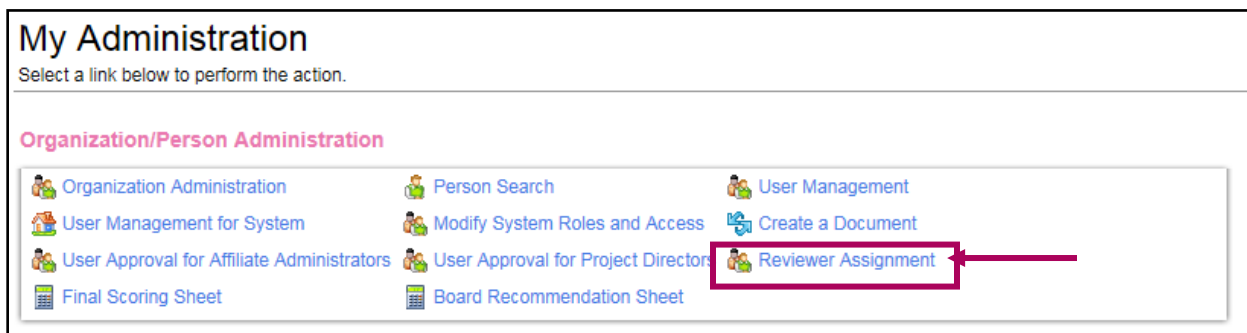
GeMS will not allow reviewers to be assigned to applications with which they have validated conflicts.

Once all compliant applications are in the status of “Application Review Required” the AGA can then begin the task of reviewer assignment.

- 1) The AGA will login and click the “My Administration” tab at the top of the page.



- 2) Click on “Reviewer Assignment” under “Organization/Person Administration.”



- 3) On the Reviewer Assignment page, the AGA will have the ability to search by different criteria. The AGA must select the “Document Type.” An example of a document type is CG Application 2018 (HQ002). If you have a second RFA, you would have the option to choose CG Application 2018 (B) (HQ002).

The screenshot shows the 'Reviewer Management' page. It has a sub-header 'This page will allow administrative users to remove, add and change a user or users roles on a document(s). Select the SHOW HELP button for detailed instructions.' Below this is a section titled 'Search Criteria'. It contains several input fields and a 'FILTER STATUS' button. The fields are: 'Role' (dropdown menu with 'Reviewer' selected), 'Document Type' (dropdown menu), 'Current Status' (dropdown menu), 'Organization' (text input), 'Organization County' (dropdown menu), 'Person' (text input), and 'Keyword(s)' (text input). A red arrow points to the 'FILTER STATUS' button.

4) The AGA will now:

- Check the box next to the application they would like to assign.
- Check the name of the corresponding reviewers for each application.
- Click “Activate User(s).”

Search Results

Current Role: Reviewer
Add Person As: Reviewer

COI (Org Name)

☐ Fernandez, Vicente
☐ reviewer, test reviewer
☐ Test, COI
☐ Test Org, Reviewer

Select reviewer(s) you want to add to the application by placing a check next to their name.

Document Information

☐ CGA(C)-2015-HQ002-spec123-0006

Type: CG Application 2015 (C) (HQ002)
 Organization: HQ002 test org
 Current Status: Application In Progress
 Title Of the Project:

Select the application that you would like to assign the reviewers to by placing a check next to the application name.

ACTIVATE USER(S) **INACTIVATE USER(S)**

You will know that a reviewer has been assigned to an application because their name will appear under the “Currently Active” column.

Document Information

☐ CGA(C)-2015-HQ002-spec123-0006

Type: CG Application 2015 (C) (HQ002)
 Organization: HQ002 test org
 Current Status: Application In Progress
 Title Of the Project:

Currently Active

☐ Test, COI

Currently Inactive

☐ Select All/None

To **remove a reviewer** from an assigned application:

- Check the box next to the appropriate application name
- Check the box next to the name of the reviewer you would like to remove under the “Currently Active” column
- Click “Inactivate User(s)” at the top of the page.

Small Grants Note: When completing reviewer assignment during the small grant process, the AGA will be able to assign the AGA, AGM, or a reviewer to an application.

Reviewing the Application

Reviewer Process Steps for Affiliate reference (see Reviewer Guide for screenshots)

Once an application has been assigned to a reviewer, they will receive an email and system notification that applications are ready and available for review. Reviewers should follow these steps to access applications for review:

- 1) Reviewer logs into GeMS.
- 2) From the “**User Homepage**,” select “**Open My Tasks**” under “**My Tasks**.”
- 3) All applications available for review will be present. Select the name of the application (CGA-XXX-XXX-XXXX) requiring review.
- 4) Once the reviewer has clicked on the application name, it will bring them to the “**Application Snapshot**.” Hover over “**Forms Menu**.”
- 5) Click on each page of the application and review the various sections.
- 6) Once all sections of the application have been reviewed, the reviewer will click on the “**Peer Review**” link under “**Forms Menu**.”
- 7) To enter scores and comments, click on “**Review Panel**” toward the top right of the page.
- 8) To save the scores and comments the reviewers should click “**Save Review**” often.
- 9) After entering scores and comments for each question, the reviewer selects “**Save Review**” waits a few seconds while the system processes the request **and then** clicks the “**Mark Page Review As Complete**” button to finalize their review.
- 10) The reviewer can then click “**Close Review Panel**.”

Reviewers will follow this process for each application they are assigned.

Helpful Hints

From the “**Peer Review**” page, the reviewer can click on a link to see “**Scoring Anchor Definitions**” or generate the “**Review Panel Questions Report**.”

“**Save Review**” – selected by the reviewer to save scores and comments throughout the process. The reviewer can select this button multiple times.

“**Mark Page Review As Complete**” – selected by the reviewer to officially submit their review of the application. The reviewer can only select this button once.

No changes can be made after “**Mark Page Review As Complete**” is selected.

Review Completion

Throughout the review process, the AGA can run the “**Application Review Status Report**” to confirm the number of reviewers who have marked their application review as complete.

- 1) AGA logs into GeMS.
- 2) AGA clicks on “**My Reports.**”



- 3) AGA clicks on “**Application Review Status Report.**”
- 4) The AGA can search based on the reviewer or the GeMS Application ID. To determine the statuses of all applications being reviewed, input a year in the **Application Name** option and click Execute.

Application Review Status Report

Selecting NO criteria results in all criteria being returned

For more detailed instructions, select the **Show Help** button.

Application Name

Reviewer

- 5) The AGA can indicate the results should be exported to an Excel document. Viewing in Excel will offer the AGA the ability to sort data.

Application Review Status Report

Selecting NO criteria results in all criteria being returned

For more detailed instructions, select the **Show Help** button.

Application Name

Reviewer

Export Results to Results Per Page Sort By

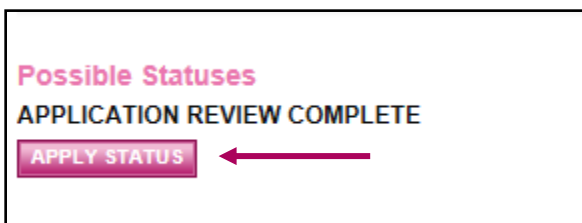
- 6) Each application, reviewer and their score will be listed. In the “**Complete**” column, a “Yes” or “No” will indicate if the reviewer has selected the “**Mark Page Review As Complete**” button.

Results				
Application	Reviewer	Complete	DateComplete	Total Score
CGA-2018-HQ001-SKI-00003	Zach Applicant1	No		4.2
CGA-2018-HQ001-SKI-00008	Aspen Reviewer1	Yes		4.4
CGA-2018-HQ001-SKI-00008	Aspen Reviewer2	No		5.2

- 7) The AGA should use this report to regularly monitor the status of reviews as the date to submit scores and comments approaches. The Affiliate should proactively reach out to reviewers to ensure they submit all scores and comments before the deadline.

The Affiliate should not consider a review to be finalized until each reviewer has selected “Mark as Complete” for all assigned applications.

- 8) Once the AGA has confirmed that all assigned reviewers for an application have selected the “Mark as Complete” button indicating their review is final, the AGA can then change the status of the application to “Application Review Complete.”
- 9) After navigating back to the application, the AGA would follow the steps to change the status.



- 10) If there are multiple applications whose review is complete, the AGA can use the “Status Push Documents” tool to push multiple applications to the “Application Review Complete” status at once.

NOTE: Contract Acceptance page is now visible once the application is in the status of “Application Review Complete”. This will allow the Affiliate to ensure the contract is accurate and reflects any requested changes prior to notifying grantees of award.

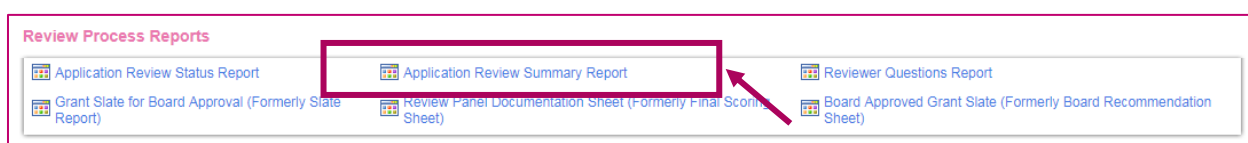
Reviewing Reviewer Scores

Once all reviewers have completed their portion of the review process, the AGA can review their scores and comments by running the “Application Review Summary Report.”

- 1) AGA logs into GeMS.
- 2) AGA clicks on “My Reports.”



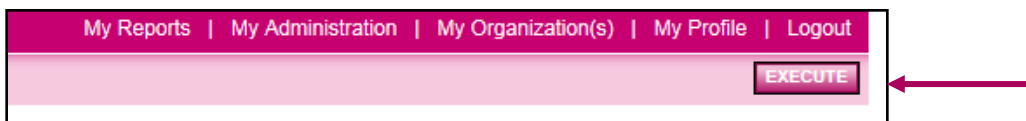
- 3) AGA clicks on “Application Review Summary Report.”



- 4) The AGA can select to search for a particular application by “Application Name” or pull up all applications for each RFA by selecting “Document Type.”
- 5) The AGA can view the results on the screen or export to Excel.

If an Affiliate has multiple RFAs for the grant year, the AGA will need to run the “Application Review Summary Report” for each RFA.

- 6) Once the selections have been made, click “Execute.”

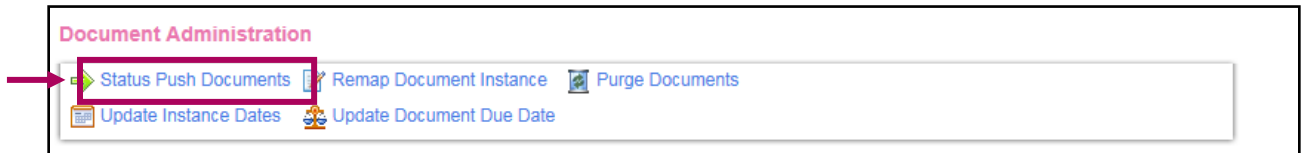


Status Push Tool

- 1) Click on “My Administration.”



- 2) Click on “Status Push Documents” under “Document Administration.”



- 3) Use the search criteria to search for applications. You can search for a single application by “Document #” (CGA-XXX-XXX-XXX) or multiple applications using the other features.
- 4) Click “Search” once selections have been made.

The screenshot shows the search criteria form for the Status Push Tool. The form has the following fields: Document #, Document Template, Document Template Instance, Organization, and Status. Each field has a corresponding input box or dropdown menu. A red box highlights the instruction 'Must make at least one selection, can make multiple' in the center of the form. Red arrows point to the input boxes for Document #, Document Template Instance, Organization, and Status. At the bottom of the form, there are two buttons: 'SEARCH' and 'CLEAR'.

After clicking search, GeMS will pull up the documents that meet the criteria entered.

- Select the “**Application Review Complete**” from the “**Push to Status**” dropdown menu.
- Enter a reason for the push.
- Check the box to the left of each application that you want to change.
- Click on “**Push Selected Documents.**”

Select a status push option from the **Push to Status** drop-down box. This will be the new document status.
Once a status has been chosen, select the check box next to each **Document #** in the **Search Results** grid you wish to push.
When all appropriate documents are selected, select the **Push Selected Documents** button.
A **Reason for Push** is required, with a character range of 25-300. This will appear in each pushed document's Status History.

Push to Status Application Review Complete a

Reason for Push
Reviewers have completed review for all applications h

PUSH SELECTED DOCUMENTS d

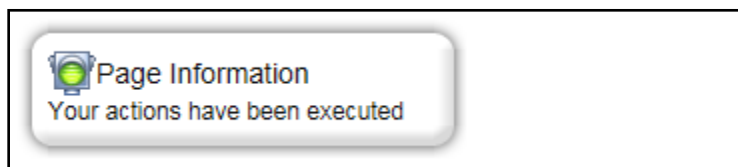
Search Results

Export Results to Screen Sort By -- SELECT -- ASC GO

<input type="checkbox"/>	Document #	Document Template Instance	Organization	Status
<input checked="" type="checkbox"/>	CGA-2012-CO101-SECO Hospital-00140	CG Application 2012 2012	Southeast CO Hospital	Application Review Required
<input checked="" type="checkbox"/>	CGA-2012-DC100-DC100 Test Org 1-00003	CG Application 2012 (B) (DC100) 2012	DC100 Test Org 1	Application Review Required

c

After clicking “**Push Selected Documents,**” you will receive a confirmation message on screen:



Anytime you use the status push tool, make sure to enter your notes in the “**Reason for Push**” field before completing the process to ensure that there is always an accurate record in GeMS of status changes; this is particularly important for audits. (Character Limit for Reason for Push: 25-300 max)

Review Completion

Post-Review Panel Meeting – Pre-Board Vote

Review Panel Meeting Voting Sheet

The Grants Chair or designated Komen staff member will use the Review Panel Meeting Voting Sheet to collect the reviewers' rescore of the applications at the Review Panel Meeting. The Review Panel Meeting Voting Sheet can be found on myKomen at https://mykomen.org/mission/community_health/grants/m/review_process

Once the average score is calculated based on the scoring of all applications at the Review Panel Meeting, use the Final Rank column to complete the Review Panel Documentation Sheet.

Review Panel Documentation Sheet

Once the reviewed applications are all in the status of “Application Review Complete” and following the review panel meeting, the AGA will enter the finalized ranks using a page called “Review Panel Documentation Sheet” located under the “My Reports” tab.

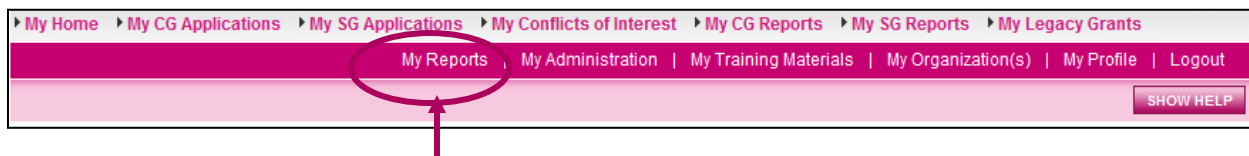
Prior to 2016, the “Review Panel Documentation Sheet” was named “Final Scoring Sheet”.

The “Review Panel Documentation Sheet” is a simplified way for the Affiliate to keep minutes of the review panel meeting. This is where the Affiliate will make note of each application's final rank, funding amount, the panel's comments on the application and the reasoning behind the final rank and funding.

The Affiliate may complete the “Review Panel Documentation Sheet” during the review panel meeting or following the panel meeting. It is highly recommended to fill this out within 24 hours of the panel meeting while reviewer commentary and feedback is fresh.

The “Review Panel Documentation Sheet” can be accessed prior to the review panel meeting and used as the preliminary slate to begin the panel discussions, if the Affiliate chooses.

- 1) To view the “Review Panel Documentation Sheet,” start by clicking on “My Reports.”



- 2) Click on “Review Panel Documentation Sheet.”

My Reports

Select a report below to execute it.

Application Process Reports

[Application Objectives and Anticipated Number Served](#)
[Application Summary Report](#)
[Current Grants - Maingate Report](#)

[Formal Partnerships and Collaborations](#)
[List Of Abstracts By Category](#)

Review Process Reports

[Application Review Status Report](#)
[Application Review Summary Report](#)
[Reviewer Questions Report](#)

[Grant Slate for Board Approval \(Formerly Slate Report\)](#)
[Review Panel Documentation Sheet \(Formerly Final Scoring Sheet\)](#)
[Board Approved Grant Slate \(Formerly Board Recommendation Sheet\)](#)

- a) Select the appropriate “Application Type.”
- b) Click “GO” next to “Application Type.”
- c) Select “Application Review Complete” for “Application Status.”
- d) Click “GO” next to “Application Status.”

Review Panel Documentation Sheet

Affiliate

KOMEN

GO

Application Type

CG Application 2018

GO

Application Status

CG Application : Application Review Complete

GO

- 3) The “Review Panel Documentation Sheet” will now appear.
- 4) The AGA will now update the “Review Panel Documentation Sheet” to reflect the decisions made during the Review Panel Meeting.

For each application, the AGA will enter:

- a) The final rank decided upon by the review panel.
- b) The final funding recommended by the review panel (*if applicable*).
- c) Notes detailing the reasoning behind the reviewers' ranking and funding decisions.
- d) Click **"Save."**

The screenshot shows the GeMS application review interface. At the top, there is a navigation bar with links: My Reports | My Administration | My Organization(s) | My Profile | Logout. Below this, a callout box labeled 'd' points to a 'SAVE' button in the top right corner, stating: 'd - Click "Save" to record all entries. You can click save throughout the process to avoid losing any work.' The main form area contains fields for 'Application Type' (CG Application 2014(C) (HQ002)), 'Application Status' (CG Application : Application Review Complete), and 'Export Results to' (Screen). Below these fields is a table with columns: Organization, Project Title, Original Rank, Original Score, Original Funding, Final Rank, Final Funding, and Notes. The table has two rows, both for 'HQ002 test org'. The 'Final Rank' and 'Final Funding' columns have input fields, and the 'Notes' column has a text area. Annotations 'a', 'b', and 'c' are placed below the table, corresponding to the 'Final Rank', 'Final Funding', and 'Notes' columns respectively.

"Notes" should record comments of the panel that can be used as feedback for the applicant/grantee in addition to documenting how the Affiliate managed reviewer conflicts during the meeting (e.g. Reviewer #1 left the room when XYZ Healthcare's application was discussed due to a conflict of interest).

If the review panel does not recommend an application to appear on the final slate, the **"Final Rank"** blank should be left empty.

- 5) Now that the “Review Panel Documentation Sheet” is complete, the AGA will then navigate to the applications selected to appear on the final slate and change the status for each to “Final Recommended Slate for Board Review.”

Possible Statuses

FINAL RECOMMENDED SLATE FOR BOARD REVIEW

APPLY STATUS ←

APPLICATION NOT APPROVED FOR FUNDING

APPLY STATUS ←

Applications the review panel does not recommend appear on the slate for the Board of Directors will be in “Application Not Approved for Funding” status. **No communication sent – Affiliate must notify the applicant.**

Helpful Hint:

To save time, once completing the “Review Panel Documentation Sheet” the AGA can use the Status Push tool (page 53) to change multiple applications to “Final Recommended Slate for Board Review” at one time.

This status change should take place prior to the Board of Directors meeting in which they vote on the slate.

Review Completion

Post-Review Panel Meeting – Pre-Board Vote

Grant Slate for Board Approval

Once the AGA has completed the “[Review Panel Documentation Sheet](#)” and changed the status of applications recommended by the review panel to appear on the final slate presented to the board to “[Final Recommended Slate for Board Review](#),” the AGA will navigate to the “[My Reports](#)” tab at the top of the page and click on the “[Grant Slate for Board Approval](#).” in order to submit the report to the Board.

Prior to 2016, the “[Grant Slate for Board Approval](#)” was named “[Slate Report](#)”

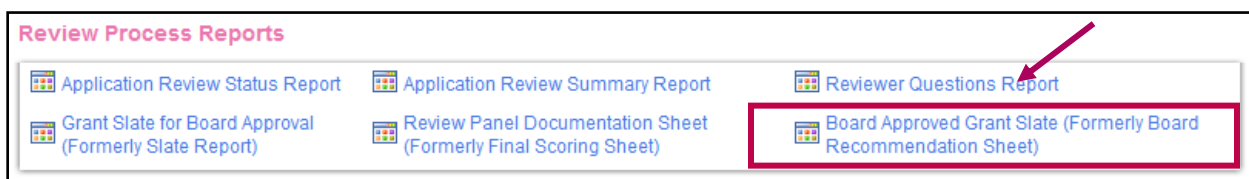
The “[Grant Slate for Board Approval](#)” will provide the rank listing of applications, the amount each applicant is requesting, along with the cumulative total that is being requested by all programs appearing on the slate.

The “[Grant Slate for Board Approval](#)” can be printed and provided to each Board member during the meeting where they vote on the grant slate.

The “[Grant Slate for Board Approval](#)” is found under “[My Reports](#).”

Before the “[Grant Slate for Board Approval](#)” will populate, the AGA must open the “[Board Approved Grant Slate](#)” and click “[Save](#)” – do not make any changes to the page, just open the “[Board Approved Grant Slate](#)” and click “[Save](#).” The “[Board Approved Grant Slate](#)” page also populates the “[Review Results](#)” and “[Grant Setup Overview](#)” page therefore this step is important to the process.

- 1) To access the “[Board Approved Grant Slate](#)” click “[My Reports](#)” then “[Board Approved Grant Slate](#).”



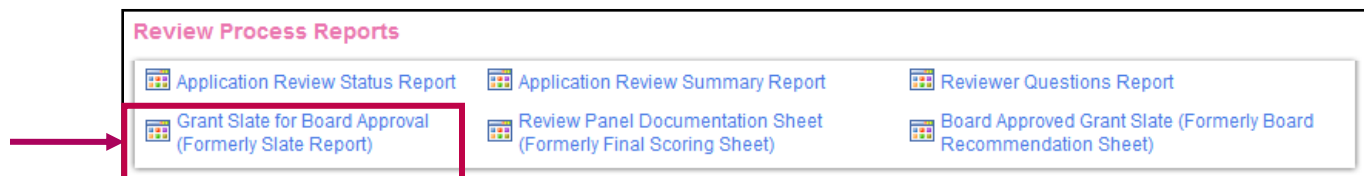
- 2) Click “[Save](#)” - no other action is necessary.



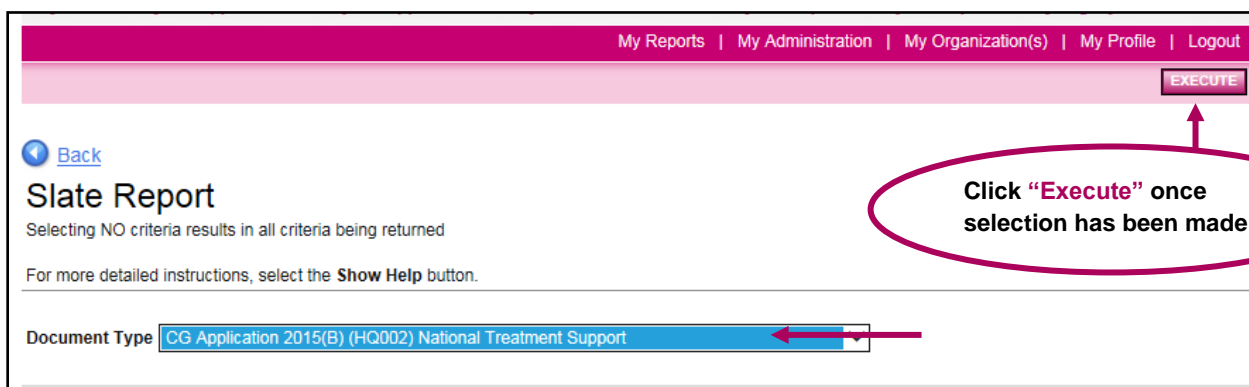
- 3) Now the “Grant Slate for Board Approval” can be pulled. Click on “My Reports.”



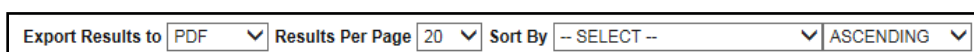
- 4) Click on “Grant Slate for Board Approval.”



- 5) Select the appropriate “Document Type” from the drop down menu, and click “Execute.”



- 6) The AGA can choose to export results to a PDF which can be presented to the Board of Directors:



The “Grant Slate for Board Approval” will include the following information:

Organization Name	Project Title	Amount Requested	Cumulative Amount Requested
YWCA of Metropolitan Dallas	YW Women's Health	\$160,732	\$160,732
UT Southwestern Medical Center, the Center for Breast Cancer Research	Mobile Mammography Outreach Project	\$103,388	\$264,120
Parkland Foundation	Breast Health Outreach Initiative	\$95,522	\$359,642

Individual grant request

A running total of all grant requests

Review Completion

Post-Review Panel Meeting – Post-Board Vote

Board Approved Grant Slate

Once the Board of Directors has voted and approved the grant slate, the AGA will complete the “Board Approved Grant Slate” found under the “My Reports” tab.

Prior to 2016, the “Board Approved Grant Slate” was named “Board Recommendation Sheet”

The “Board Approved Grant Slate” is where the AGA will enter the Final Funding Amount, the Board Approval Date, and any notes from the Board meeting that are applicable to the process.

This sheet should not be completed until AFTER the Board has voted to approve the slate.

- 1) Click on “My Reports.”



- 2) Click on “Board Approved Grant Slate.”



- 3) Complete the form for each application listed and click “Save.”

Organization	Project Title	Final Rank	Final Funding	Board Approval Date	Notes
HQ002 test org		0	\$0	1/1/1900	
HQ002 test org		0	\$0	1/1/1900	

Enter Final Funding amount, Board Approval Date (the date the BOD voted to approve the slate), and any notes (if necessary)

Review Completion

Post-Review Panel Meeting – Post-Board Vote

Review Results Page

After completing each of the preceding steps of the review process, the AGA should navigate back to the “Review Results” page in each application to make sure the information has been reported correctly.

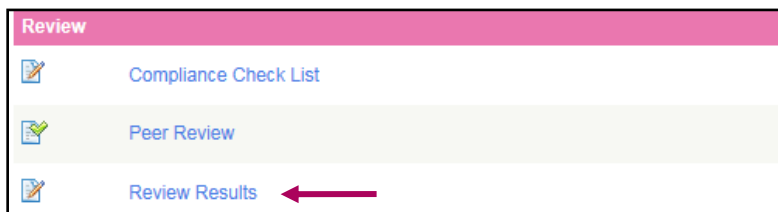
- 1) Navigate to “My CG Applications.”



- 2) Search by “CG Application Type” or “Year.” Then select “Execute.”

 A screenshot of the 'KOMEN Document Tab Search - CG Applications' page. The page has a search form with the following fields: 'CG Application Types' (a dropdown menu), 'CG Application Name' (a text box), 'Person' (a text box), 'Status' (a dropdown menu), 'Organization' (a text box), and 'Year' (a text box). Red arrows point to the 'CG Application Types' and 'Year' fields. At the top right of the form is a red 'EXECUTE' button. A red box with white text and an arrow points to the 'EXECUTE' button, containing the text: 'Click “Execute” once selections are made'.

- 3) Click on the Application name you would like to view (CGA-XXX-XXX-XXX).
- 4) Hover over “Forms Menu” and click on “Review Results” under the “Review” section.



Below is an example from the “Review Results” page.

REVIEW RESULTS	
Review results: This section will provide a view of the overall results of the review process. All of these fields will be pre-populated from data collected in other sections.	
Original	
Application Rank	8
Application Score	74.3
Funding Amount Requested	\$50,000.00
Review Committee	
Application Rank	9
Funding Amount Requested	\$50,000.00
Notes	Panel was concerned about the cost per patient for this program. Felt there were other resources available for transportation.
Final Board Recommendations	
Board Approval Date	2/9/2015 12:00:00 AM
Funded Amount	\$50,000.00
Notes	

Information feeds from the reviewer's scores and reflects the ranking based solely on submitted scores.

Information feeds from the “Review Panel Documentation Sheet” and reflects the ranking from the review

Information feeds from the “Board Approved Grant Slate.”

The AGA should verify the “Review Results” page for each application reviewed by the review panel, including those applications not recommended to appear on the final slate.

Verifying the “Review Results” pages ensures that the Affiliate has accurate record keeping for each application.

Review Completion – Award Notification

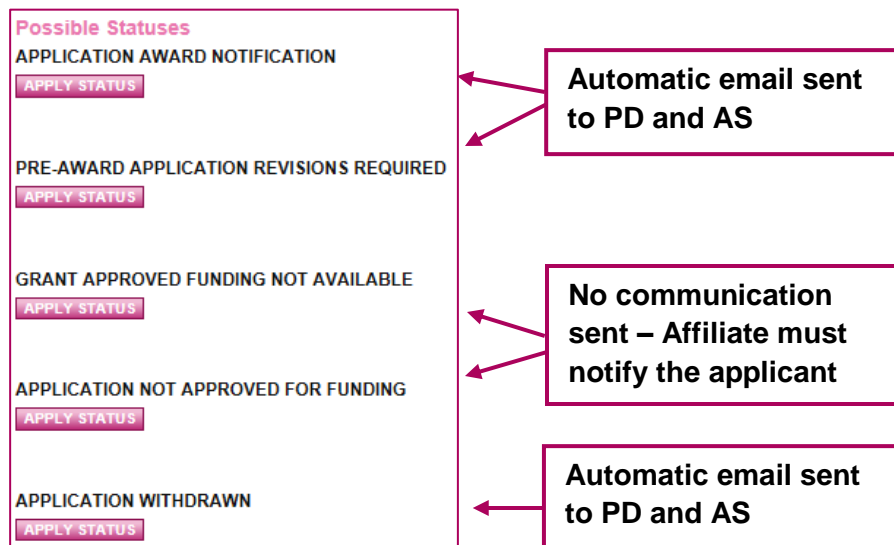
These steps should be completed **AFTER** the Board has voted on the slate **AND AFTER** the Affiliate has received a fund balance report from Komen HQ and the Affiliate has made the final decisions on their available funding for the year.

It is *highly recommended* that Affiliates communicate final funding decisions with applicants outside of GeMS prior to changing any application statuses.

Applicants will be able to see the status once the status has been changed; this is why it is important to communicate with them prior to changing the status.

Selecting “**Application Award Notification**” or “**Pre-Award Application Revisions Required**” will generate an automatic email to the organization’s Project Director and Authorized Signer. These are the only status changes that will result in an automatic email.

To complete the review process, the AGA should navigate to each application and change the status of the application to either “**Application Award Notification**,” “**Pre-Award Application Revisions Required**,” “**Grant Approved Funding Not Available**,” “**Application Not Approved For Funding**” or “**Application Withdrawn**” depending on the decision regarding the application.



Application Award Notification - the application will begin the award and contract process. The application **needs no revisions** and is ready to begin the contract process.

Pre-Award Application Revisions Required – the application has been approved for funding and funds are available; however, program or budget revisions are needed before the award and contract process can begin. This option gives the applicant the opportunity to make adjustments based on the review panel’s suggestions or comments.

Grant Approved Funding Not Available – the application was approved, but funds are not available. This status is for applications that were approved as program that would be eligible to receive funds but the Affiliate does not have the funds available to award the organization.

Application Not Approved For Funding – the application was not approved for funding.

Application Withdrawn – the applicant has informed the Affiliate they no longer want to proceed in the process.

Pre-Award Application Revisions Required

Grantee Process Steps for Affiliate reference (see Grantee Guide for screenshots)

Applications must be in the status of “Pre-Award Application Revisions Required” in order to make any changes to the application. This includes changes to the narrative, objectives, budget and other areas.

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

- 1) **Project Director** will log into GeMS.
- 2) From the “**User Homepage**” and click “**Open My Tasks**” under “**My Tasks.**”
- 3) Select the application name for the project in the status “**Pre-Award Application Revisions Required.**”
- 4) From the “**Application Snapshot**” page, hover over “**Forms Menu**” and update each form that the Affiliate has requested revisions to.
- 5) Once all revisions are completed, hover over “**Status Changes**” and select the “**Apply Status**” button under “**Authorized Signature for Pre-Award Application Revisions.**”
- 6) The **Authorized Signer** logs in to GeMS and selects “**Open My Tasks**” under “**My Tasks.**”
- 7) Select the name of the application in the status “**Authorized Signature for Pre-Award Application Revisions.**”
- 8) Confirm changes have been made to the appropriate sections of the application by hovering over the “**Forms Menu**” and selecting the appropriate pages.
- 9) Hover over “**Status Changes**” and select the “**Apply Status**” under “**Pre-Award Application Revisions Submitted.**”

Affiliate Process

Once the application is in “**Pre-Award Application Revisions Submitted**” status:

- 1) The changes need to be reviewed and approved by the Affiliate.
- 2) If the changes are accepted, the Affiliate will then change the application status to “**Application Award Notification.**”
- 10) If additional changes must be made, the Affiliate will change the status to “**Pre-Award Application Revisions Required**” and begin the process again.

Grants Setup

The grant setup process is in place to ensure we properly reflect when the grant expense and liability are incurred to ensure that our financials are in compliance with GAAP (Generally Accepted Accounting Principles). A liability and expense has occurred, according to GAAP, once the Affiliate's Board of Directors have approved the grant slate and determined the grant funding line.

The Affiliate must submit a Grants Setup Request via Documents Due on myKomen annually no later than April 15th.

Detailed instructions are available on myKomen:

http://mykomen.org/mission/community_health/grants/

The following steps can't be done until ALL grants that will be funded have been placed into “Application Award Notification” status.

Placing the grants into this status will automatically place the grant into “Application Contract Pending” status. The Affiliate will then:

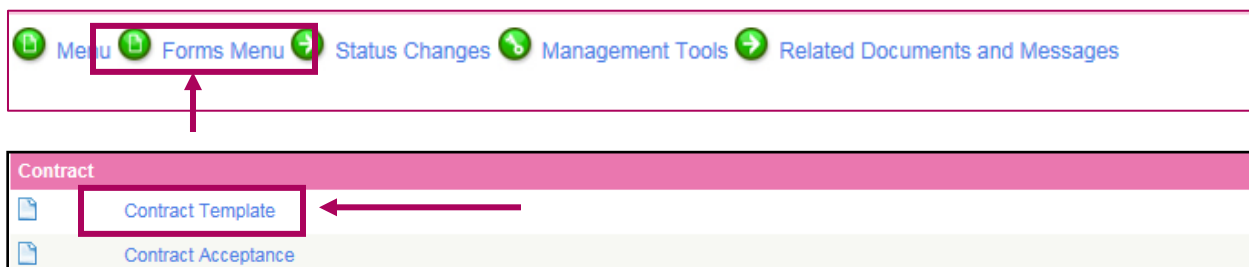
- Log into myKomen.
- Submit the “Grant Setup Request” via “Documents Due.”
- Completing this form will signal accounting to set up your grants in PeopleSoft.

The “Grant Setup Overview” page is informational only. This page provides an overview of the information the Accounting team uses to set up the grant payment including the total award amount, education, screening & treatment allocations, and the grantee contact information for payment.

Application Award and Contract

Contract Setup

- 1) The AGA will hover over “Forms Menu” and select the “Contract Template” form.



- 2) The Affiliate will now complete the “Contract Template.”

This information will feed directly into the contract.

The screenshot shows the 'CONTRACT TEMPLATE' form. It includes a description: 'The purpose of this section is to collect all the information that is required to prepare the grant agreement. Once you have completed the form below, make sure to click the save button or all information will be lost.' The form fields are: Grant Start Date, Grant End Date, Organization Name (Aspen Ski Lodge), Title of Project (Journey to 1000 Mammograms), Funded Dollar Amount (\$198,328), Installment Dollar Amount, and Number of Equal Payments. Annotations with arrows point to specific fields: 'For most Affiliates, this is 4/1 – 3/31 (be sure to include the year)' points to Grant Start Date; 'Insert the dollar amount of each grant payment' points to Installment Dollar Amount; and 'Insert number of equal payments' points to Number of Equal Payments.

- 3) Click “Save.”



Remember: the “Contract Template” must be filled out for each awarded grant

- 4) The AGA can now click on “**Contract Acceptance**” to view the contract in GeMS to ensure all information is accurate.



CONTRACT ACCEPTANCE

This section includes the specific requirements, terms and conditions that Affiliate and grantee agree to as part of the grant agreement. This is where an applicant will either accept or decline the grant.

Grantees must either agree to all contents of the grant agreement by clicking “I Agree” or click “I Decline” if the grantee does not agree with all contents of the grant agreement.

Clicking “I Agree” is the legal equivalent of signing the grant agreement. Once the grantee clicks “I Agree” and the Affiliate is ready to finalize the grant agreement, it is necessary for the Affiliate to check the Affiliate Confirms Acceptance of Grant Agreement box to execute the grant agreement.

If the grantee chooses “I Decline” and desires modifications to the grant agreement, the grantee must complete the Contract Modification Request Form in its entirety for review by an Affiliate representative. Should modifications be accepted by the Affiliate, a completed Letter of Clarification must be uploaded by the Affiliate before both parties agree to the revised terms and conditions of the grant agreement. To execute the final version of the grant agreement, the grantee must click “I Agree” and the Affiliate must click “Affiliate Confirms Acceptance of Grant Agreement” in the gray box marked “For Affiliate Use Only.”

Authorized Signatory Contact Information

Name Jill Authorised signer
 Title ASSometimePD
 Phone # (654) 654-6544
 Email

Please Upload Insurance Certification and W9

Insurance Certification No file chosen [Click here for a sample Certificate of Insurance form*](#)
 W9 No file chosen *

**The Denver Metropolitan Affiliate of the Susan G. Komen Breast Cancer Foundation
 d/b/a Denver Metropolitan Affiliate
 GRANT AGREEMENT
 COMMUNITY GRANTS PROGRAM 2017-2018**

GRANTEE ORGANIZATION: Aspen Ski Lodge
GRANTEE ADDRESS: 123 Main Street Aspen, Colorado 45654-5455
PROJECT DIRECTOR: Tones romes
EFFECTIVE DATE: **TERMINATION DATE:**

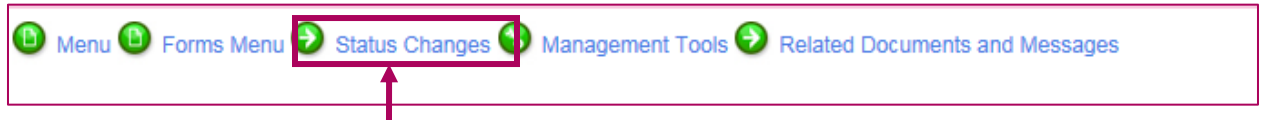
PROJECT TITLE AND PURPOSE:
 Unless otherwise stated in this Agreement, the Grant Funds will be used specifically as described in Grantee’s grant application and proposed budget (together, the “Application”), which can be located in the Komen Grants e-Management System (“GeMS”) and are made a part hereof for all purposes. To the extent that the terms of this Agreement conflict with the terms of the Application, the terms of this Agreement will prevail.

If after reviewing the contract, there are changes that need to be made that can’t be addressed by making changes to the “**Contract Template**” page, please submit a support request via [myKomen](#).

- 5) Once the AGA has reviewed the contract and is satisfied that everything is accurate, they will change the status of the application to “**Contract Acceptance Required.**” This

will notify the grantee that they can now access the contract and begin taking the steps necessary to execute the agreement.

- 6) To change the status, the AGA will hover over “Status Changes.”



- 7) The AGA will then click “Apply Status” under “Contract Acceptance Required.”



The grantee should now begin the process of accepting the grant contract.

Application Award and Contract

Contract Acceptance

Grantee Process Steps for Affiliate reference (see Grantee Guide for screenshots)

The Authorized Signer is the only system user permitted to accept the contract for an organization.

The steps below are followed by the Authorized Signer when the grantee accepts the terms outlined in the contract without any changes.

- 1) The **Authorized Signer** logs into GEMS.
- 2) From the User Homepage, click the “Open My Tasks” under “My Tasks.”
- 3) Select the name of the application in the status “Contract Acceptance Required.”
- 4) From the **Application Snapshot** page, hover over “Forms Menu.”
- 5) Select the “Contract Acceptance” page.
- 6) The Authorized Signer should review the contract, if they **AGREE** to the terms and conditions; they will then:
 - Upload a Certificate of Insurance showing evidence of the levels of coverage required by the RFA and naming Komen as both additional insured and certificate holder.
 - Upload a current W9.
 - The contract must be accepted by clicking the box next to the appropriate statement.
 - Click “Save” at the top of the page.

Error Message will appear, if the W9 and COI are not attached AND / Agree is not clicked, the Grantee will not be able to save.

- 7) Hover over “Status Changes” and select “Contract Accepted.”

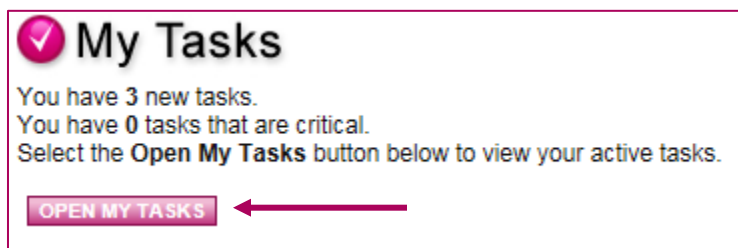
The Authorized Signer has the option to select Award Declined if they decide not proceed with the award process. If the applicant chooses the decline the award and grant setup has been completed, you will need to proceed with rescinding the grant.

Application Award and Contract

Contract Acceptance

AGA Process

- 1) After the contract has been accepted, the AGA will then log into the system and review the “Contract Acceptance” page.
- 2) From the Userhome page, the AGA will select “Open My Tasks” under “My Tasks.”



- 3) Select the Application name (CGA-XXX-XXXX-XXXX) for the appropriate in “Contract Accepted” status.

My Tasks

Export Results to: Sort by:

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	CG Application	Aspen Ski Lodge	CGA-2017-HQ001-SKI-00009	Amendment Submitted	5/9/2017	
	CG Application	Aspen Ski Lodge	CGA-2017-HQ001-SKI-00010	Application Review Complete	5/31/2017	
	CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00021	Contract Accepted	5/31/2017	


- 4) From the CG Application Menu, hover over “Forms Menu” and Select “Contract Acceptance.”



- 5) The AGA should **verify that the Certificate of Insurance** provides evidence of the coverage detailed in the RFA and the terms of the contract and names Komen and Komen Headquarters as Additional Insured and a Certificate Holder.
- 6) The Affiliate should also **verify that a current, signed W9** is attached to the contract page.

The Affiliate can view these attachments by clicking on the blue hyperlinks.

Please Upload Insurance Certification and W9

Insurance Certification	<input type="text" value="368253-ACS-KomenCOIApril2015.pdf"/>	<input type="button" value="Browse..."/>	<input type="checkbox"/> DELETE
W9	<input type="text" value="368253-ACS,Inc.W9_signed.pdf"/>	<input type="button" value="Browse..."/>	<input type="checkbox"/> DELETE 

- 7) The Affiliate should then confirm that the Authorized Signer has officially agreed to the terms and conditions of the contract by selecting “**I agree.**” Changing the status to “**Contract Accepted**” without selecting “**I agree**” is not sufficient documentation of the grantee’s acceptance of the contract.

Check the **I Agree** box to confirm acceptance of the terms and conditions of the Grant Contract 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 Contract 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**

- 8) Once the Affiliate has confirmed that the grantee has successfully provided the appropriate documentation and accepted the contract. The Affiliate will then check the box next to “**Affiliate confirms acceptance of grant agreement.**”

For Affiliate Use Only

☐ Affiliate confirms acceptance of grant agreement

- 9) The Affiliate will then select “**Save**” at the top of the page.

My Administration My Organization(s) My Profile Logout			
		<input type="button" value="SAVE"/>	<input type="button" value="CHECK GLOBAL ERRORS"/>

Proceed to page 79 for the steps to begin the **Payment Request** process. The following pages will walk through the process when a grantee requests modifications to the contract.

Application Award and Contract

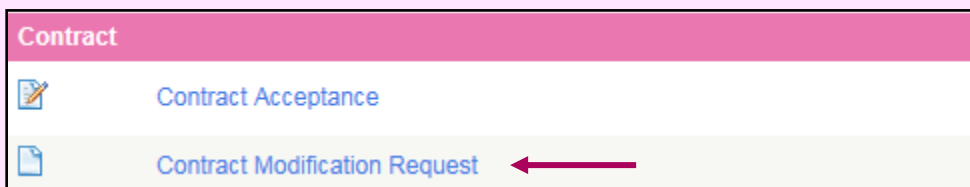
Declining the Contract/Contract Modifications

Grantee Process Steps for Affiliate reference (see Grantee Guide for screenshots)

The Authorized Signer is the only system user permitted to decline the contract for an organization.

- 1) 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
- 2) Click **"Save"** at the top of the page.
- 3) Hover over **"Status Changes"** at the top of the screen.
- 4) Select **"Apply Status"** under **"Contract Modifications Requested."**

Once the Authorized Signer has changed the status to "Contract Modifications Requested," a new form "Contract Modifications Request" will appear on the CG Application Menu.

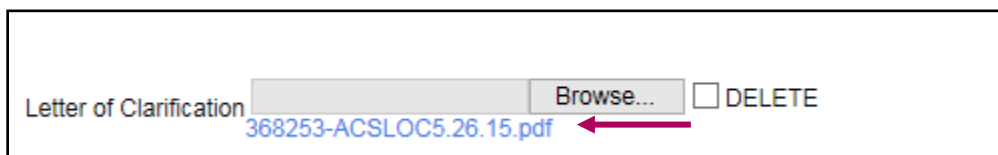


Now that the application is in the status of **"Contract Modifications Requested,"** either the Authorized Signer or the Project Director can make changes to the **"Contract Modifications Request"** page.

- 5) 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."**
- 6) The **Authorized Signer** will hover over **"Status Changes"**.
- 7) Select **"Apply Status"** under **"Contract Modifications Submitted."**

The Affiliate will then review the request and accept or submit their revisions and place the application back in the status of "Contract Acceptance Required" (see page 75 for AGA steps to create a Letter of Clarification).

- 8) Once the Authorized Signer has been notified that the application is again in the status of “**Contract Acceptance Required**” return to the “**Application Snapshot**” page for the application.
- 9) Hover over “**Forms Menu**” and select the “**Contract Acceptance**” page.
- 10) There will now be a “**Letter of Clarification**” available as an attachment to the initial contract. Review the contract including the “**Letter of Clarification.**”



The Authorized Signer should review the contract. If they **AGREE** to the terms and conditions in the initial contract and the **Letter of Clarification**; they will:

- Upload a Certificate of Insurance showing evidence of the levels of coverage required by the RFA and naming Komen as both additional insured and certificate holder.
- Upload a current W9.
- Click the circle next to “**I Agree.**”
- Click “**Save**” at the top of the page.

- 11) Hover over “**Status Changes**” at the top of the screen and select “**Apply Status**” under “**Contract Accepted.**”

If the Authorized Signer does **NOT AGREE** to the terms in the initial contract and Letter of Clarification, they will:

- Select “**I Decline**” at the bottom of the contract.
- Select “**Save.**”

- 12) Hover over “**Status Changes**” at the top of the screen and select “**Apply Status**” under “**Contract Modifications Requested.**”

- 13) Repeat steps #1-7 on the previous page to submit additional requested changes to the Affiliate for review.

Application Award and Contract

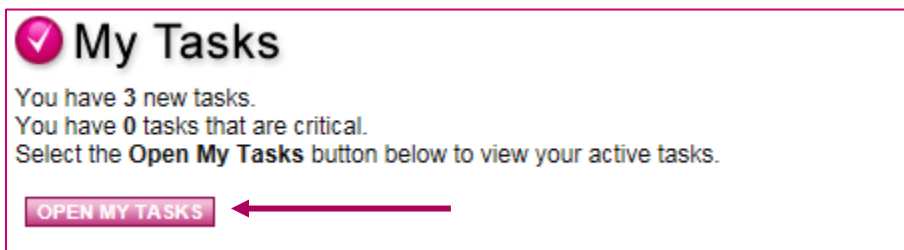
Declining the Contract/Contract Modifications

AGA Process

Letter of Clarification

- A Letter of Clarification is used to outline changes to the contract that are mutually agreed upon by the Affiliate and the grantee.
- Since the Letter of Clarification changes the language in the initial contract approved by the Board of Directors and can increase the Affiliate's exposure to risk, the Letters must be approved by either the Board of Directors or an individual approved by the Affiliate's Board through a formal vote that is recorded in Board meeting minutes.
- The Affiliate should consult local legal counsel on the language adapted for all Letters of Clarification.
- Once legal counsel has approved the language, the Board of Directors or the Board approved Letter of Clarification Approver will approve or deny the Letters of Clarification.
- The Letter of Clarification template can be found on myKomen at https://mykomen.org/mission/community_health/grants/m/5_award_process.

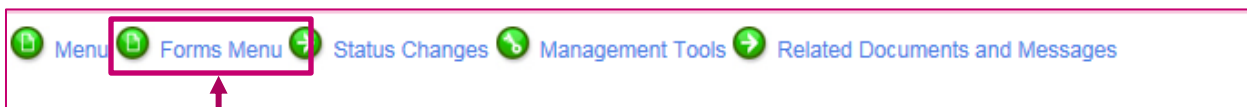
- 1) To review the grantee's requested changes, the AGA will log in to GeMS.
- 2) Click on "Open My Tasks" under "My Tasks."



- 3) Select the Application name (CGA-XXX-XXXX-XXXX) for the appropriate project in "Contract Modifications Submitted" status.

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	CG Application	Aspen Ski Lodge	CGA-2017-HQ001-SKI-00009	Amendment Submitted	5/9/2017	
	CG Application	Aspen Ski Lodge	CGA-2017-HQ001-SKI-00010	Application Review Required	5/16/2017	
	CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00021	Contract Modifications Submitted	5/30/2017	

- 4) Hover over “Forms Menu.”



- 5) Click on “Contract Modification Request.”

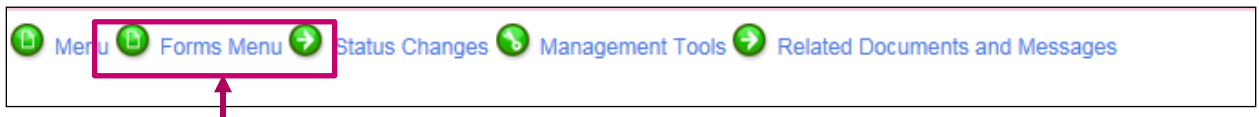


- 6) The AGA will now be able to view the changes requested by the grantee.

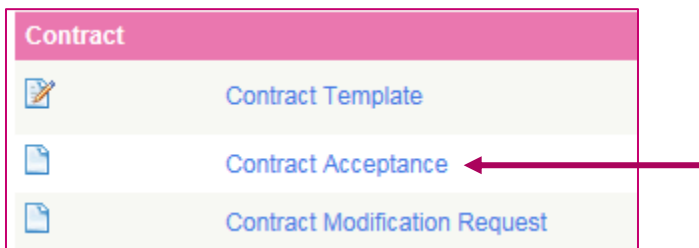
A screenshot of the 'CONTRACT MODIFICATION REQUEST' form. The form has a title bar and two main sections. The first section is titled '1) Restrictions of the Use of Grant Funds' and contains a text area with a red box annotation that says 'If a grantee has requested a change, text will be entered'. The second section is titled '2) Collaborating Organizations' and contains a text area with a red box annotation that says 'No change was requested to this section, it is blank.'.

- 7) The Affiliate can then copy the text entered by the grantee into the Letter of Clarification Template available on myKomen.
- Once the Affiliate has created a Letter of Clarification, they should provide it to local legal counsel for review.
 - After local legal counsel has reviewed and approved the requested changes and/or made suggested edits, the Letter of Clarification should then be provided to the Affiliate’s Board of Directors or designated Letter of Clarification Approver for their approval or denial.

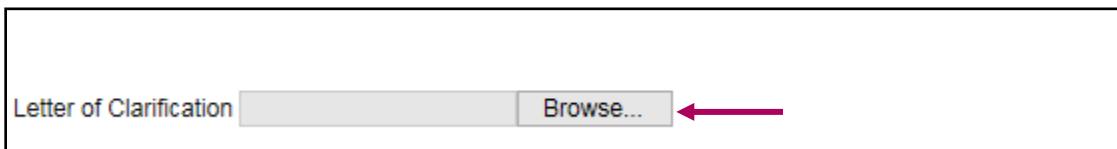
- The Letter of Clarification Approver cannot approve requests to change the insurance and/ or indemnity terms of the contract. Any changes to the insurance and indemnity terms of the grant contract must be approved by the Board of Directors.
- 8) If **APPROVED** by legal counsel and the Letter of Clarification Approver (or Board of Directors), the AGA will then navigate to the **Application Snapshot** page.
- 9) Hover over “**Forms Menu.**”



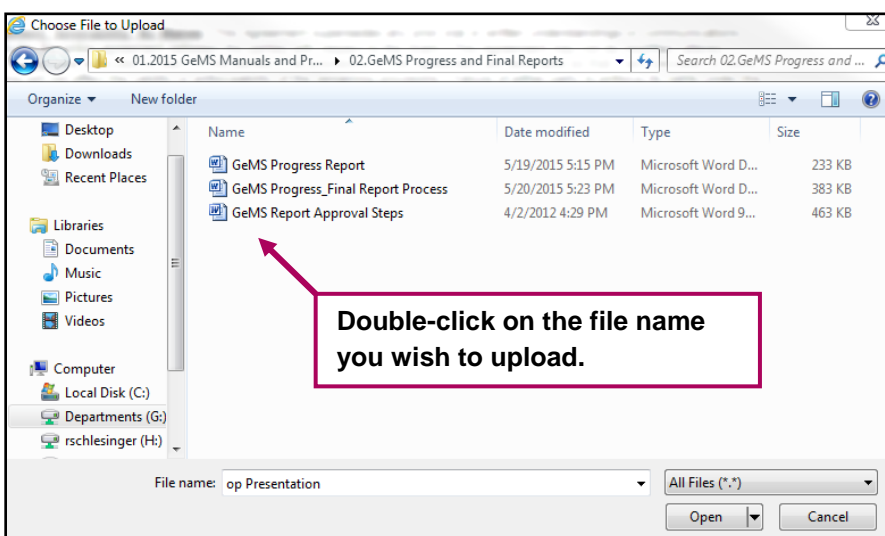
- 10) Click on “**Contract Acceptance.**”



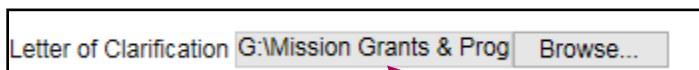
- 11) Scroll to the bottom of the page, to upload the approved “**Letter of Clarification**” click on the “**Browse**” button.



- 12) Select the file you wish to upload by double clicking on the file name for the appropriate file.



13) The file will now be attached to the “Contract Acceptance” page.



Seeing a file name path here indicates the document has been uploaded.

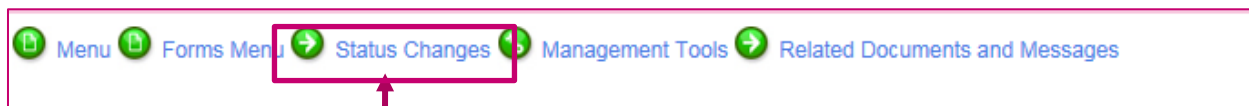
14) Click “Save” at the top of the page.



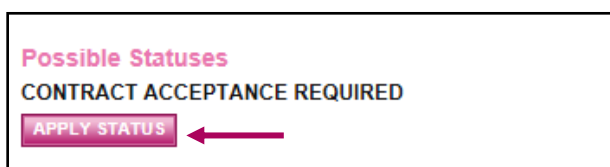
15) Once the letter has been saved, it can be accessed by clicking on the hyperlink.



16) Now that the approved Letter of Clarification has been uploaded by the Affiliate, the AGA can hover over “Status Changes.”



17) Click on “Apply Status” under “Contract Acceptance Required.”



The Authorized Signer will now log in to the system and review the Letter of Clarification.

If the Authorized Signer accepts the terms of the contract with the addition of the Letter of Clarification, the AGA will follow the steps beginning on page 70 to accept the contract.

If the Authorized Signer does not accept the terms with the addition of the Letter of Clarification and requests additional modifications, the AGA will follow the steps that begin on page 75 to go through the Letter of Clarification process again. There are occasions that the Affiliate and grantee will go through multiple rounds of negotiations as they work through finalizing the contract.

The Letter of Clarification should only be utilized to record changes to the contract at the time before the grant is awarded. Once a grant has been awarded, any subsequent changes to the project will be made through Amendment/Grant Change Requests in GeMS.

Payment Request

Once the contract has been accepted and the AGA has verified the Certificate of Insurance and W9 and officially accepted the grant agreement by clicking “Affiliate confirms acceptance of grant agreement” and saved the “**Contract Acceptance**” page, the Affiliate can begin the process to request grant payment.

For Affiliate Use Only

☒ Affiliate confirms acceptance of grant agreement

The application should still be in the status of “**Contract Accepted.**”


If the application is not in this status, use the “**Status Push Documents**” tool under “**My Administration**” to push the application to “**Contract Accepted**” (see page 53).

Failure to have the application in “**Contract Accepted**” status before taking the following actions will delay payments to the grantee.

The following steps to set up the grant payment must be completed by the Affiliate Grants Manager (AGM).

The AGA cannot serve as both the AGA and the AGM – these must be two separate individuals.

- 1) The **AGM** will login into GeMS and click the “**My CG Applications**” tab at the top of the page.
- 2) Click on “**Open My Tasks**” under “**My Tasks.**”

 **My Tasks**

You have 2 new tasks.
You have 0 tasks that are critical.
Select the **Open My Tasks** button below to view your active tasks.

OPEN MY TASKS 

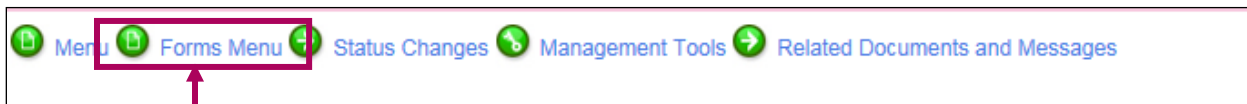
- 3) Select the Application name (**CGA-XXX-XXXX-XXXX**) for the appropriate project in “**Contract Accepted**” status.

My Tasks

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

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	CG Application	Aspen Ski Lodge	CGA-2017-HQ001-SKI-00010	Application Review Complete	5/31/2017	
	CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00021	Contract Accepted	6/2/2017	

- 4) The AGM will hover over “Forms Menu.”



- 5) The AGM will select “First Grant Payment” to open the first grant payment page.



- 6) The AGM will complete the “First Grant Payment” page and save the page.

FIRST GRANT PAYMENT

First Grant Payment: This section is where you will input all the information required to prepare the first payment for the grant.
Once you have completed the form below, please make sure you click the save button or no information will be saved.
Only the AGM (Affiliate Grants Manager) is permitted to update the First Grant payment form.

Request Date *

Grant Activity Number CGA-2016-HQ001-SKI-00002

People Soft Vendor ID PS-123456789

Project Director bob smith

Banking Institute Name *

Last four digits of the bank account the payment should be made from *

Payment Amount *

Payment # *

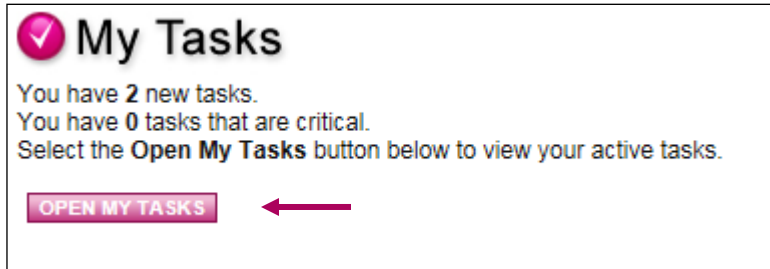
W9 verified during Contract Acceptance ☐ Yes ☐ No *

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



AGA Process

- 1) The AGA should now log in and verify that the information the AGM has entered in the “First Grant Payment” page is correct.
- 2) Click on “Open My Tasks” under “My Tasks.”

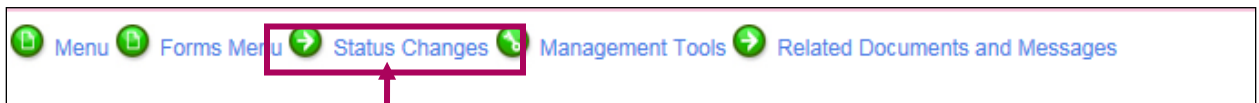


- 3) Select the Application name (CGA-XXX-XXXX-XXXX) for the appropriate project in “Contract Accepted” status.

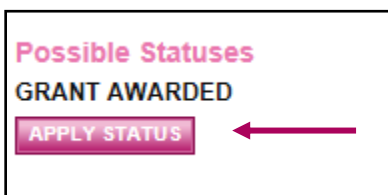
My Tasks
 Export Results to Screen Sort by: -- Select -- GO

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	CG Application	Aspen Ski Lodge	CGA-2017-HQ001-SKI-00010	Application Review Complete	5/31/2017	
	CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00021	Contract Accepted	6/2/2017	

- 4) Once the “Contract Acceptance” and “First Grant Payment” pages are complete, the AGA can change the status of the application to “Grant Awarded.”
- 5) The AGA will hover over “Status Changes.”



- 6) The AGM will then change the status of the application to “Grant Awarded.”



Helpful information related to the payment process:

All checks will be mailed from Komen HQ directly to grantees.

The checks will be mailed to the address the grantee has entered under the “My Organization” tab in GeMS.

Affiliates can also ensure that grantee address information is correct in PeopleSoft by running the SGK_VNDR_ADDR_LOC_DETAILS query and filter by Class for “G” for Grants to review the grantee vendor information. Affiliates should submit a “Vendor Setup/Change Form” PSR through myKomen as soon as possible to correct any inaccurate information. This will help ensure grant checks are delivered timely to the correct address.

PeopleSoft is not automatically updated when there is an address change made in GeMS – instead, Affiliates should submit a “Vendor Setup/Change Form” PSR through myKomen.

Komen Shared Services downloads a grant payment report from GeMS twice a week on Monday and Wednesday morning, 7:00 AM Central Time. The date stamp occurs when the AGA changes the status to “Grant Awarded.” If the status is not updated until 7:01 AM or later Monday or Wednesday morning, it will not be included in that day’s report and will be part of the next regularly scheduled report for processing.

Progress and Final Report

Grantee Process Steps for Affiliate reference (see Grantee Guide for screenshots)

Report Creation

If a grantee can't initiate a report, check the following:

- Ensure the status of the application is **"Grant Awarded."** A report can only be initiated when a grant is in this status.
- **Ensure it was the Project Director who tried to initiate an application.** Only a Project Director can initiate a report.
- Ensure the Project Director is connected to the application. (And while you're at it, ensure the Authorized Signer is, too). The AGA can add the PD to the report by using the **"Add/Edit"** people function under **"Management Tools"** on the **CG Report Menu** page. The PD can add any other users from their organization following the same process.
- **Ensure the instance dates for the report are current (see page 89).**

Multiple progress reports can be initiated and completed by the organization. **Grantees should only complete one final report.** If a no cost extension has been requested and approved, the final report should only be completed at the **end** of the grant term. Extending the grant term does not change the fact that the final report is only completed once. The Affiliate can determine if additional progress reports are required and adjust the instance dates accordingly.

- 1) The **Project Director** will login to GeMS.
- 2) From the **User Homepage**, click the **"My CG Applications"** tab at the top of the page.
- 3) Search for all applications in the status **"Grant Awarded"** and click **"Execute."**
- 4) Select the name of the application for which the progress or final report will be created.
- 5) From the **Application Snapshot** page, hover over **"Related Documents and Messages."**
- 6) Select the name of the report you would like to create.

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 2017				
CG Progress Report	Initiate a/an CG Progress Report 2017				

- 7) Select **"I Agree"** to continue the creation of the report.
- 8) The report menu will automatically open at this point.

Report Completion

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

Reports are found under the “My CG Reports” tab.

- 1) The **Project Director** will login to GeMS.
- 2) From the User Homepage, select “Open My Tasks” under “My Tasks.”
- 3) Select the report name of the progress or final report you would like to complete.
- 4) Hover over “Forms Menu” to view/edit/complete the forms.
- 5) Complete all of the report forms.

Report Submission

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

- 1) The **Project Director** will login to GeMS.
- 2) From the User Homepage, select “Open My Tasks” under “My Tasks.”
- 3) Select the report name for appropriate report in the status “Progress Report in Process” or “Final Report in Process.”
- 4) Hover over “Status Changes.”
- 5) Click “Apply Status” under “Authorized Signature Required.”

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 User Homepage, click on “Open My Tasks” under “My Tasks.”
- 8) Select the report name in the status “Authorized Signature Required.”
- 9) Review the report.
- 10) Hover over “Status Changes.”
- 11) Click “Apply Status” under “Progress Report Submitted.”

Helpful Hints:

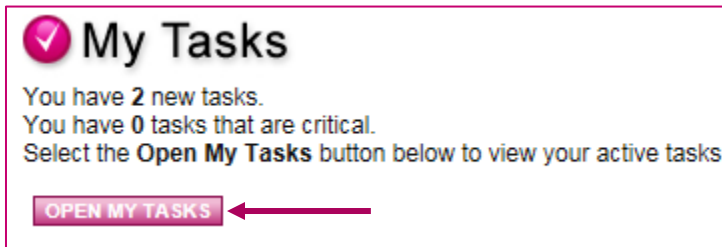
A grantee can start a report early, but if they have a grant amendment that is approved after initiating a report, they need to start a new report. The reason is that the existing report will not pull in the new updated information from the application (budget, objectives, etc.,) – essentially the numbers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

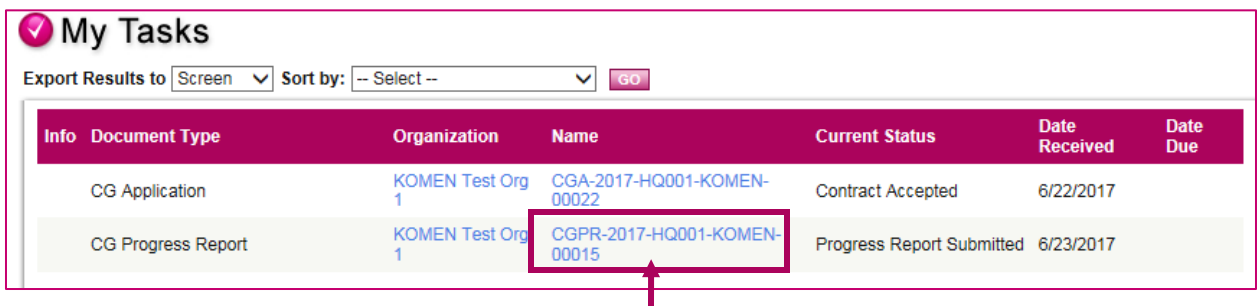
Reviewing Reports

The AGA or the AGM will review the submitted progress reports.

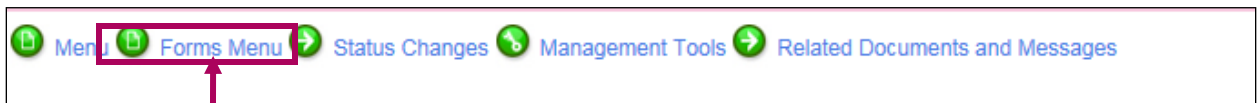
- 1) From the User Homepage, select “Open My Tasks” under “My Tasks.”



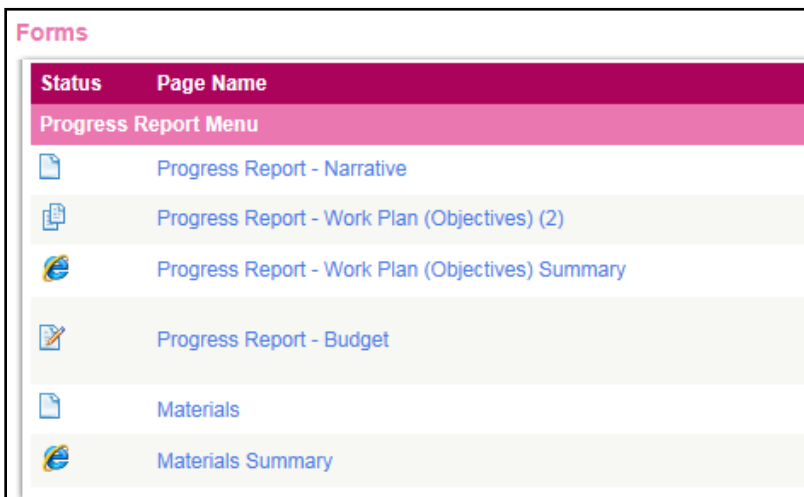
- 2) Select the report name for the appropriate report in the status “Progress Report Submitted” or “Final Report Submitted.”



- 3) Hover over “Forms Menu” to view the report pages.

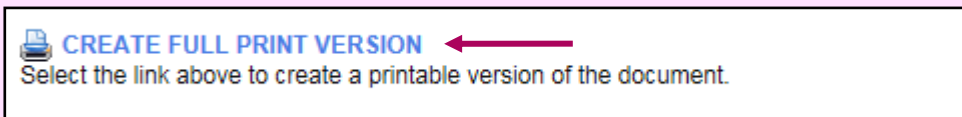


- 4) Review each page of the report.

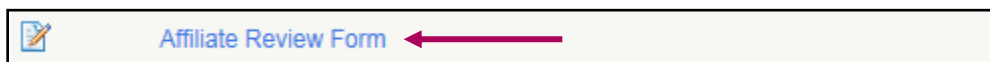


Helpful Hint:

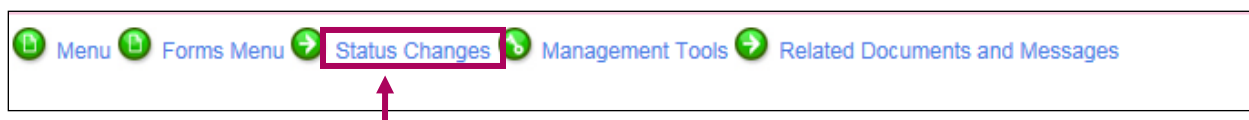
To print a copy of the report – hover over “Management Tools” from the **Report Snapshot** page, and then click on “**Create Full Print Version.**” A PDF of the full report will be created.



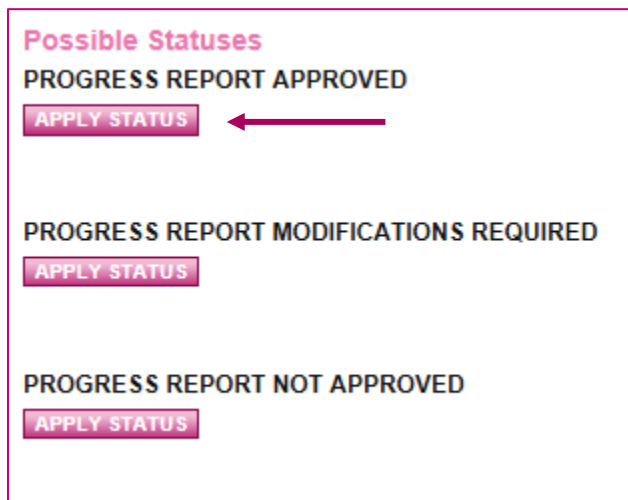
- 5) Once the AGM or AGA has completed their review of the report, select the “**Affiliate Review Form**” page from the **Progress Report Menu**.



- 6) Complete the “**Affiliate Review Form.**”
 7) If the report is approved, hover over “**Status Changes.**”



- 8) Select “**Apply Status**” under “**Progress Report Approved**” or “**Final Report Approved.**”



If the report is **NOT APPROVED** and modifications are necessary:

- a) The AGA will change the status to “**Progress Report Modifications Required.**”

Possible Statuses

PROGRESS REPORT APPROVED
APPLY STATUS

PROGRESS REPORT MODIFICATIONS REQUIRED
APPLY STATUS ←

PROGRESS REPORT NOT APPROVED
APPLY STATUS

The Affiliate will need to communicate with the grantee why the report was not approved and what changes are being requested. This is best done via email, so the requested changes are in writing.

- b) The grantee will make necessary adjustments and the Project Director will change the status to “**Authorized Signature Required for Modifications.**”
- c) The Authorized Signer will change the status to “**Progress Report Modifications Submitted**” or “**Final Report Modifications Submitted.**”
- d) The AGA or AGM will then repeat the steps to either approve the report or send it back to the grantee for further revisions, ending with changing the status to “**Progress Report Approved**” or “**Final Report Approved.**”

The Affiliate may have to go through several rounds of revisions with the grantee before the grantee is able to provide all of the information the Affiliate needs to be able to approve the report.

There may be times when the Affiliate chooses not to approve a Progress or Final Report. In that instance, select the status “Progress Report Not Approved” or “Final Report Not Approved.” The AGA has the option to change the status to allow the grantee to make modifications if they become responsive.

Progress and Final Reports

Instance Dates

Instance Dates define when a report or application is available for a grantee to initiate and submit to the Affiliate.

Instance Dates apply to **ALL** documents associated with that fiscal year.

Instance dates only apply to documents (applications or reports) that have not been initiated. Once an application or report has been initiated, you must use the Date Modification Tool (see next section) to update a due date.

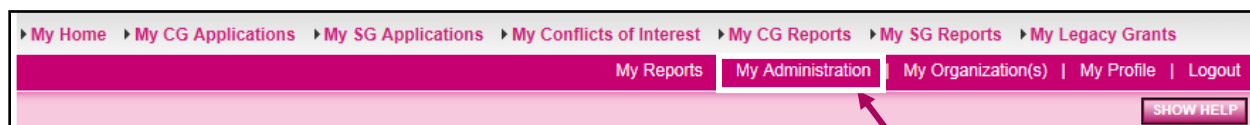
- The AGA is permitted to update Instance Dates in GeMS.
- Instance Dates are determined based on the grant cycle reporting that is established by the Affiliate and are vital to an Affiliate's grantee timeline.
- Instance Dates will be setup in GeMS based on the responses in your Affiliate's Community Grants Configuration Questionnaire completed as part of the RFA set-up.
- **If a reporting deadline has been extended for ALL grantees**, the Affiliate must update the Instance Dates for the report. Please be sure to select the appropriate report in the Object Template box.
 - *If a deadline is extended for one report, the Affiliate will change the individual document due date using the "Date Modification Tool" (see next section).*

Helpful Hints:

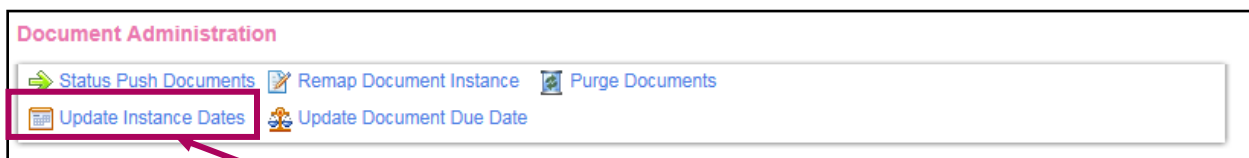
- Verify the Instance Dates once the grant has been awarded; if they are not accurate follow the steps below to make the necessary changes.
- Multiple Instance Dates cannot be created at the same time.
- Once the Grantee has created a progress report, you can then update the Instance Dates for their Quarterly Reports. If a grantee is on a quarterly reporting cycle, it is up to the Affiliate to adjust the instance dates to reflect the appropriate reporting dates.
- Do not set Instance Dates for Final Reports until all Progress Reports are complete.
- After a report has been created/initiated, the Instance Dates can no longer be used to change the due date. The Date Modification tool must be used. *Refer to page 91 for steps pertaining to the Date Modification Tool.*

To verify/change reporting instance dates

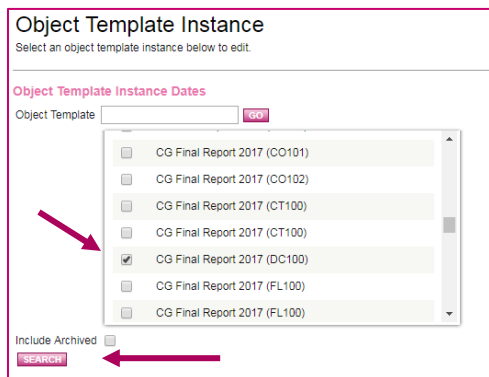
- 1) Click on "My Administration."



- 2) Click on “Update Instance Dates” under “Document Administration.”



- 3) Select the appropriate “Object Template” from the drop down menu and click “Search.” Ensure you are change the dates for the appropriate application, progress or final report template.



- 4) Fill in the appropriate dates for your Affiliate’s grantmaking calendar.

- “Allowed” should remain 99,999 for progress reports. This allows for Affiliates to have as many reports as they need. Final reports will only allow one (1) final report.
- Enter date and time.

Object Template Name	Instance Name	Availability Begin/ End Date	Period Start/ End Date	Due Date/ Archive Date	Allowed
CG Final Report 2017 (DC100)	CG Final Report 2017 (DC100)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>

↑

When you want grantees to be able to initiate reports

↑

The period that the report should cover (ex. 3/31 – 9/30 for a progress report)

↑

Progress/Final Report submission due date and time

Example of a completed Instance Date page:

Object Template Name	Instance Name	Availability Begin/ End Date	Period Start/ End Date	Due Date/ Archive Date	Allowed
CG Final Report 2017 (DC100)	CG Final Report 2017 (DC100)	<input type="text" value="04/01/2019"/> <input type="text" value="12:00:00 AM"/> <input type="text" value="05/14/2019"/> <input type="text" value="11:59:59 PM"/>	<input type="text" value="4/1/2018"/> <input type="text" value="12:00:00 PM"/> <input type="text" value="3/31/2019"/> <input type="text" value="12:00:00 PM"/>	<input type="text" value="05/14/2019"/> <input type="text" value="5:00:00 PM"/> <input type="text"/> <input type="text"/>	<input type="text" value="1"/>

Date Modification Tool

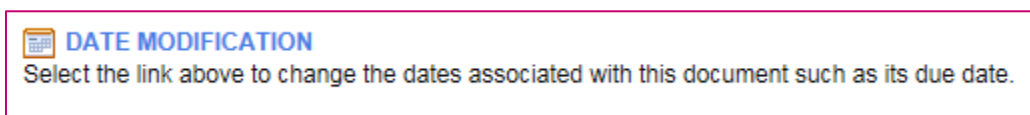
If a grantee is attempting to submit a document after a deadline, and is reporting to the Affiliate they do not have any statuses available to apply, often the due date for that individual document needs to be updated.

To change an individual grantee report deadline from the CG Report Menu, you would:

- 1) Hover over “**Management Tools.**”



- 2) Select “**Date Modification.**”



- 3) Update the dates as needed and press “**Save.**”

A screenshot of the 'Date Modification Options' form. The form has a pink header 'Date Modification Options'. Below it, there are two sections: 'PERIOD DATES' and 'DUE DATE'. The 'PERIOD DATES' section includes a description and two rows of date pickers for 'Period Begin' and 'Period End'. The 'DUE DATE' section includes a description and a date picker. A red box on the right side of the form contains the text: 'Change the necessary dates – depending on the circumstances. You may change the period dates or the due date or both.' Two red arrows point from this box to the date pickers in the 'PERIOD DATES' section. Below the date pickers, there is a 'Reason For Change' section with a text area and a 'Reason' dropdown menu. A red box around the text area contains the text: 'Provide a reason why you are making this change to capture this information for the grant record.'

Individual document’s due dates can also be changed from “**My Administration,**” using the “**Update Document Due**” tool.

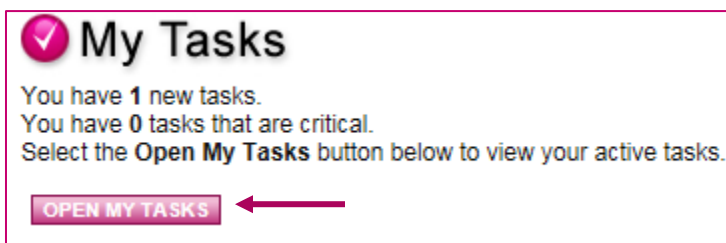
Second Grant Payment Request

The **“Grant Payment”** form must be completed by the **Affiliate Grants Manager (AGM)**.

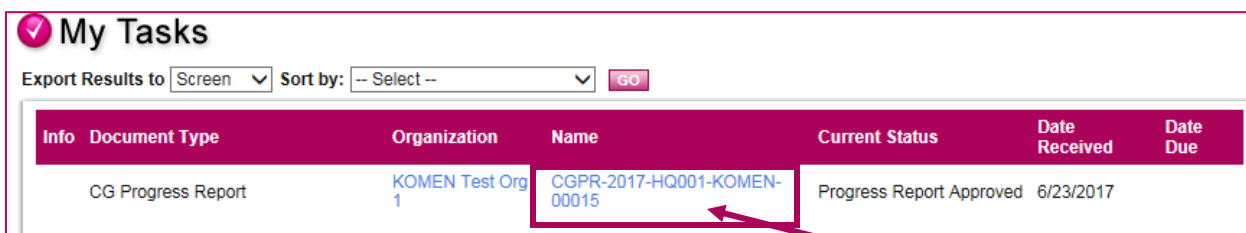
The **“Grant Payment”** form will not appear until the **“Affiliate Review Form”** is complete and the status is updated to **“Progress Report Approved.”**

The Grant Payment form for midyear payments is found on the **CG Report Menu**, **NOT** the **CG Application Menu**.

- 1) The **AGM** will login to GeMS and click on **“Open My Tasks”** under **“My Tasks.”**



- 2) Select the report name in the status **“Progress Report Approved.”**



- 3) Hover over **“Forms Menu”** and select **“Grant Payment.”**



- 4) AGM completes the “Grant Payment” form.

GRANT PAYMENT

Grant Payment: This section is where you will input all the information required to prepare the next grant installment payment.

Only the AGM (Affiliate Grants Manager) is permitted to update the Grant Payment form.

Request Date

Grant Activity Number

People Soft Vendor ID

Project Director

Banking Institute Name

Last four digits of the bank account the payment should be made from

Payment Amount

Payment #

W9 verified during Contract Acceptance ☒ Yes ☐ No

AGM will enter the required information.

- 5) Click “Save.”

[My Home](#) |
 [My CG Applications](#) |
 [My SG Applications](#) |
 [My Conflicts of Interest](#) |
 [My CG Reports](#) |
 [My SG Reports](#) |
 [My Legacy Grants](#)

[My Reports](#) |
 [My Administration](#) |
 [My Organization\(s\)](#) |
 [My Profile](#) |
 [Logout](#)

- 6) The AGM should notify the AGA that they have completed the “Payment Request Page.”
- 7) The **AGA** will now login to GeMS and verify that the information entered on the “Payment Request Page” is accurate.
- 8) The AGA will then change the status to “Payment Processed.” This will cue Accounts Payable at Komen HQ to begin the steps necessary to disburse payment to the grantee.

Possible Statuses

PAYMENT PROCESSED

Helpful Hints:

To help ensure timely payments to grantees:

Prior to payment request:

Prior to the reporting deadline, have grantees verify the address information under their “My Organization” tab – this is the address where the check will be mailed.

Payments will be mailed to the address that appears in PeopleSoft. Therefore, it is important that the Affiliate run a PeopleSoft vendor report prior to reviewing progress reports and requesting grant payments – to ensure the address in PeopleSoft matches the address under the grantees’ “My Organization” page.

To run this report:

Run the SGK_VNDR_ADDR_LOC_DETAILS query.

Work with the Affiliate Finance staff/volunteer to run this report.

Filter by Class for “G” for Grants to review the grantee vendor information.

This should be the first step, even prior to reviewing progress reports. Doing this ASAP will ensure incorrect addresses are discovered and corrected prior to the Affiliate’s request for the grant check.

If address corrections are needed in PeopleSoft, Affiliates should submit a “Vendor Setup/Change Form” PSR through myKomen (My Komen>Support Requests>PeopleSoft>PSR Submission>PSR Vendor Setup/Change Form) as soon as possible to correct any inaccurate information.

After payment request:

Komen Shared Services downloads a grant payment report from GeMS twice a week on Monday and Wednesday morning, 7:00 AM Central Time. The date stamp of the payment request occurs when the AGA changes the status to “Payment Processed.”

If the status is not updated until 7:01 AM or later Monday or Wednesday morning, it will not be included in that day’s report and will be part of the next regularly scheduled report for processing.

Affiliates *should review their Check Register* after each pay cycle to confirm requested payments have been processed. This can be done in PeopleSoft, by going to Accounts Payable>Reports>Affiliate Check Register.

If a grant payment cannot be located after several pay cycles, please submit a Support Request ticket. Go to *My Komen>Support Requests>Mission>GeMS Support* and complete all the data fields with as much specific information as possible, including screen shots. This helps to expedite a resolution to the issue.

You may follow up with your Financial Analyst with questions regarding your payment requests or more specifics on how to run PeopleSoft reports.

Amendments

An overview of the Grant Amendment / Change Request process



Grant Change Request

Grantee Process Steps for Affiliate reference (see Grantee Guide for screenshots)

Amendment Submission

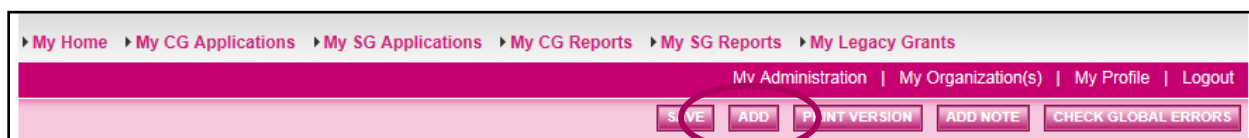
- 1) The Project Director logs in to GeMS.
- 2) Click on **“My CG Applications”** tab on the User Homepage.
- 3) Execute an application search for the application for which they want to request an amendment/grant change. Application must be in **“Grant Awarded”** status to begin this process.
- 4) Grantee selects the name of the application they would like to amend/change.
- 5) Hover over **“Status Changes”** and select **“Apply Status”** under **“Amendment Requested.”**
- 6) Hover over **“Forms Menu”** and select **“Request for Grant Change.”**
- 7) Complete the **“Request for Grant Change”** form and select **“Save.”**
- 8) The **Project Director** will then change the status to **“Authorized Signature Required for Amendment Submission.”**
- 9) The **Authorized Signer** will then login to GeMS, review the request and change the status to **“Amendment Submitted.”**
- 10) At this point the Affiliate will review the request.

Helpful Hints:

The **“Request for Grant Change”** form can be **“Saved” ONLY** once the status has been changed to **“Amendment Requested.”**

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).

If a grantee needs to make additional amendment requests throughout the course of the grant cycle, they will follow the same steps above for steps 1-8. When the **“Request for Grant Change”** form opens, they will have the option to **“Add”** a new request. This will create an additional **“Request for Grant Change”** form; all request forms will be accessible through a drop down box at the top of the grant change form.

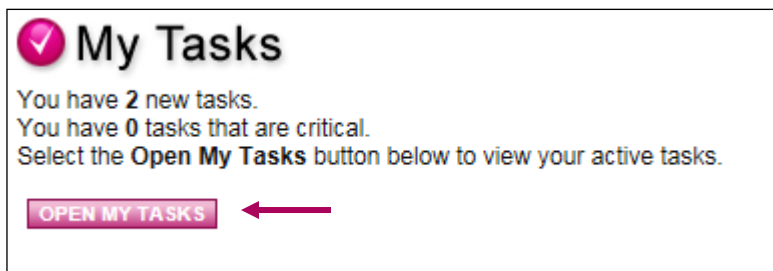


Note about Amendments/Changes and Reports: If a grantee requests a change request prior to a reporting deadline and has already initiated a report – make sure that the grantee starts a new report that will pull in their updated application information. *(Remember the information from reports pulls directly from the application as it existed at the time the report was created.)*

If a no cost extension has been requested and approved, the final report should only be completed at the end of the grant term. Extending the grant term does not change the fact that the final report is only completed once. The Affiliate can determine if additional progress reports are required and adjust the instance dates accordingly.

Amendment Approval

- 1) AGA logs in to GeMS.
- 2) Click on “Open My Tasks” under “My Tasks.”

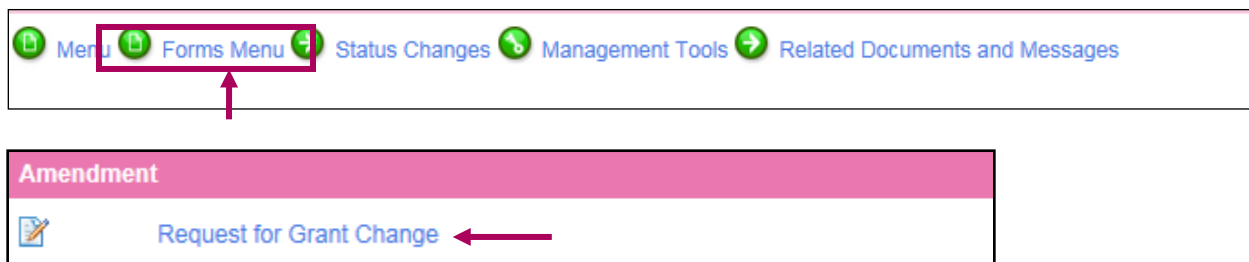


- 3) Select the Application name (**CGA-XXX-XXXX-XXXX**) for the appropriate project in “Amendment Submitted” status.

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

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00021	Amendment Submitted	6/23/2017	
	CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00022	Contract Accepted	6/22/2017	

- 4) Hover over “Forms Menu” and the “Request for Grant Change” form.

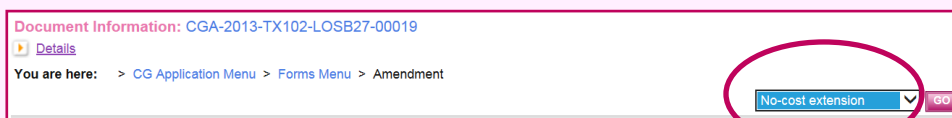


If a grantee has multiple amendment requests:

- A number indicating the number of requests they have made will appear next to the form name.



- The Affiliate and grantee can choose between the requests, using the drop down menu at the top of the “Request for Grant Change” form and selecting “GO”



- 5) After reviewing the “Grant Change Request” form, the AGA will complete the “Amendment Approval” form. **This form must be completed for all requests, approved and denied.**

Click the arrow to access the Amendment Approval form

AMENDMENT APPROVAL

Request Title: New Project Director*

Komen Approval (Komen signature below shall indicate its approval of this request for change and the Grant Contract shall be amended herein):
Authorized Signatory of Komen: [dropdown]

Approved?
☐ Yes
☐ No

If no, why has this not been approved?
 [text area]
 0 of 1000

Effective Date of Amendment to Grant Contract: [date field]

Select “Yes” if approved, “No” if denied

Provide justification for approval or denial

- 6) Click “Save” once form is complete.

- 7) Hover over “Status Changes” and select the correct status.

If request is **DENIED**

If request is **APPROVED**

If the amendment request requires changes, select Amendment Requested to roll the status back to the grantee to make changes to the Request for Grant Change Form to resubmit.

If the request is denied, the Request for Grant Change form is deleted. The Affiliate should reach out to the grantee and explain why the amendment was not approved.

Amendment Resubmission

Grantee Process Steps for Affiliate reference (see Grantee Guide for screenshots)

Once a Grant Amendment Request has been approved, the Grantee must now log back into GeMS and make the approved changes in the original application and resubmit the amendment. If the grantee does not complete these steps, the application and future progress and final reports will not affect the approved changes.

- 1) **Project Director** logs into GeMS.
- 2) Click on “**Open My Tasks**” under “**My Tasks.**”
- 3) Select the application name for the appropriate application in “**Grant Amendment Approved**” status.
- 4) Hover over “**Forms Menu**” and make the necessary changes in the application to reflect the approved changes in the amendment and “**Save**” each page.
- 5) Once all changes are made, the Project Director will hover over “**Status Changes.**”
- 6) **Project Director** selects “**Apply Status**” under “**Authorized Signature Required for Amendment Resubmission.**”
- 7) **Authorized Signer** will then login to GeMS to review the changes made to the application pages and change the status to “**Amendment Resubmitted.**”
- 8) The Affiliate will then review the changes made to the application pages and approve or deny the submission.

Helpful Hint:

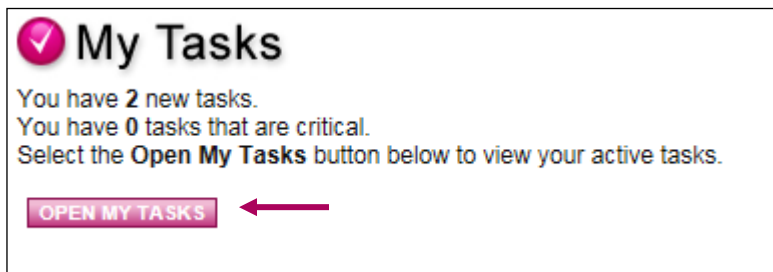
The Application pages needing changes after an amendment is approved will vary based on the nature of the request. Pages that commonly need updates include: budget, objectives, narrative, key personnel/salaries.

If the amendment is for a no-cost extension, please ensure you change the grant end date using the Date Modification Tool referenced on page 91 to the new approved end date. As there are no required changes by the grantee, push the status of the application to “Grant Awarded.”

Amendment Resubmission Approval

The AGA will now review the changes the grantee made to the application to reflect the approved grant amendment.

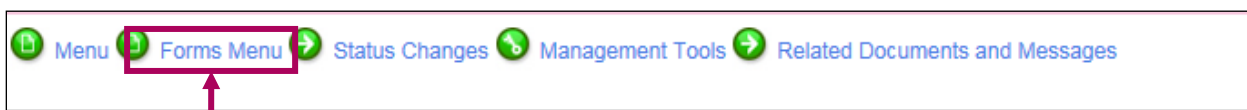
- 1) AGA logs in to GeMS.
- 2) Click on “Open My Tasks” under “My Tasks.”



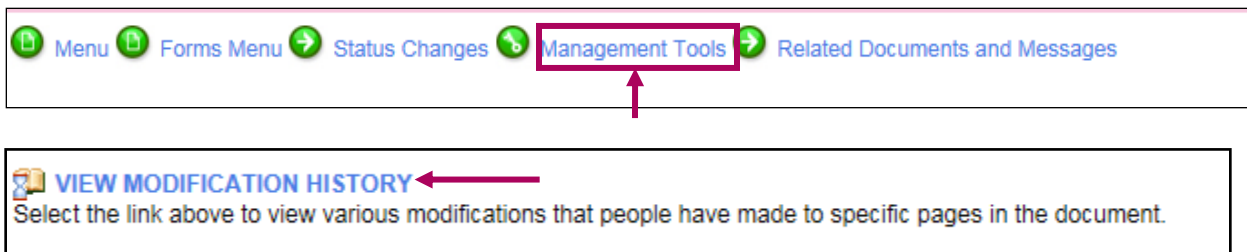
- 3) Select the Application name (CGA-XXX-XXXX-XXXX) for the appropriate project in “Amendment Resubmitted” status.

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00021	Amendment Submitted	6/23/2017	
	CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00022	Contract Accepted	6/22/2017	

- 4) Hover over “Forms Menu” and select/review the pages the grantee updated based on the approved amendment. To see all if changes were made to the pages, click the “Forms Menu” button and you will see the dates and times the pages were last saved.



You can also use the “View Modification History” tool under “Management Tools.”



Modification History		
Page	Modification	Date/Time
Project Abstract ←	Modified	10/7/2013 9:47:30 AM
Project Narrative	Modified	10/7/2013 9:47:30 AM
Project Target Demographics	Modified	10/7/2013 9:47:30 AM
Project Work Plan - Goals - Diagnosis Interventions - DI-F	Modified	10/7/2013 9:47:30 AM

From this form, the Affiliate can click on the page they would like to review the changes by clicking on the page name.

Abstract Narrative (Limit your response to 1500 characters)

Provide a brief description of the proposal including the following

- The purpose of the program.
- A description of key activities.
- A summary of evaluation methods.
- The expected or resulting change(s) your program will likely bring in your community.

LBUCC proposes to expand upon it's breast health efforts, creating a comprehensive Breast Health Program for low-income, mostly Hispanic female patients. We intend to decrease the disparities in access to breast health prevention and care faced by our patient community. Currently, breast health efforts include screening mammograms and diagnostic referrals, each of which are limited only by a lack of resources. The proposed program will increase the number of no-cost screenings for female patients age 40 and older, increase the number of no-cost (or low cost) diagnostic services for those patients, and enhance patient education and support. A Program Manager will fine-tune, expand upon and coordinate the program through

Clicking on this notepad will pull up a box that shows the original content.

Revised content

- 5) Once the AGA has reviewed the necessary application pages, hover over “**Status Changes.**”

If the changes are correct, the AGA will change the status to “**Grant Awarded.**”

If the grantee needs to make additional changes, the AGA will change the status to “**Amendment Modifications Required**” and the process of updating the application pages will begin again for both the grantee and Affiliate.

Possible Statuses

AMENDMENT MODIFICATIONS REQUIRED

APPLY STATUS

←

Grantee must make additional changes to the application to reflect the approved amendment.

GRANT AWARDED

APPLY STATUS

←

Necessary changes have been made to the application; amendment process is complete.

Rescinded Grants

If the Affiliate needs to rescind a grant, follow these steps:

These steps cover only what is to occur in GeMS and should only be done **AFTER** the Board of Directors has voted to rescind a grant. For more information on the rescission process as it pertains to grantmaking, review the Grantmaking Guide or contact the Community Programs Team.

- 1) AGA logs into GeMS.
- 2) AGA clicks on “My CG Applications.”



- 3) Search by status “Grant Awarded and select “Execute.”

Back

KOMEN Document Tab Search - CG Applications

Document Tab Search

For more detailed instructions, select the [Show Help](#) button.

CG Application Types

CG Application Name

Person

Status

Organization

Year

EXECUTE

Once selection is made, click “Execute”

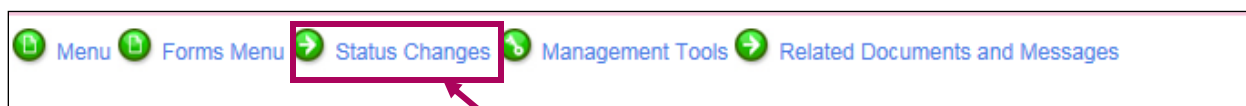
- 4) Select the name of the application for which you wish to begin the rescission process.

Results

Document Type	Organization	Name	Current Status	Year	No Cost Extension
CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00021	Grant Awarded	2017	No

1

- 5) Hover over “Status Changes.”



- 6) Click on “Grant Rescinded in Process.”

Possible Statuses

GRANT RESCINDED IN PROCESS

APPLY STATUS ←

GRANT CLOSEOUT IN PROCESS

APPLY STATUS

- 7) Hover over “Forms Menu.”

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

- 8) Click on “Rescinded Grant Form.”

Rescinded
 [Rescinded Grant Form](#) ←

- 9) Complete the “Rescinded Grant Form” and press “Save” when complete.

RESCINDED GRANT FORM

Please remember to upload the Board Minutes that include the vote to rescind funds via myKomen.

This page must only be completed after the Board of Directors has voted to rescind a grant.

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

Project Period Dates: to

Project Title:

Grantee:

Project Director:

Phone:

Funded Amount:

Rescinded Amount:

Board Approval Date of Rescinded Grant:

Total amount to be rescinded – may include funds the grantee has already received and funds not yet issued by the Affiliate

Date of BOD meeting when the vote to rescind the grant took place

Please explain reason for rescinded funds.

Insert reason for rescinding the grant.

0 of 2000

- 10) Hover over “Status Changes.”

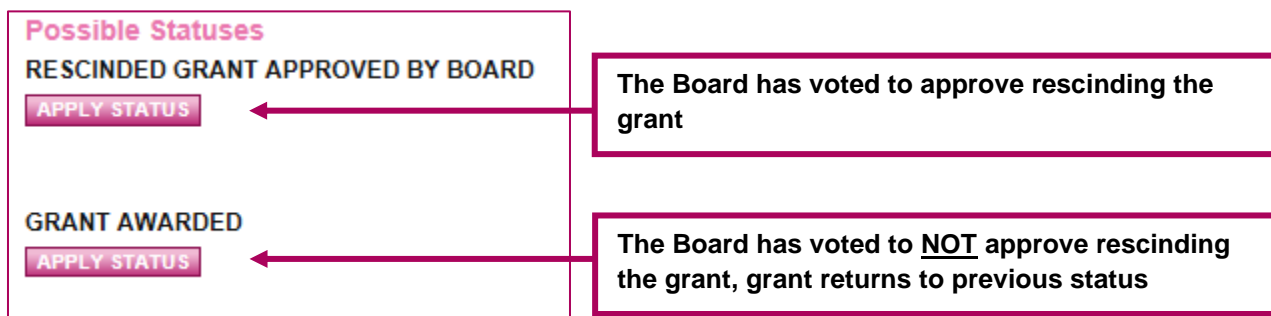
- 11) Click on “Apply Status” under “Recommended for Board to Rescind.”

Possible Statuses

RECOMMENDED FOR BOARD TO RESCIND

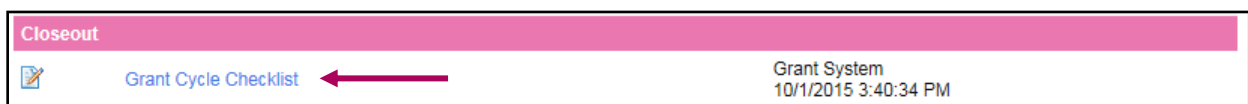
APPLY STATUS ←

12) The AGA will change the status:

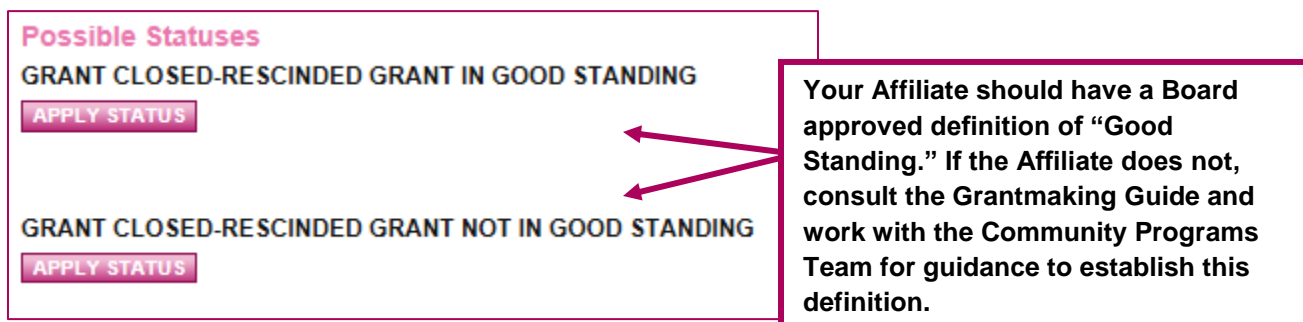


13) If the rescission is **approved**, the Affiliate will work with the grantee to finalize any reporting and closeout requirements, including the return of any outstanding funds.

14) The Affiliate can then work to close out the grant in GeMS by completing the “**Grant Cycle Checklist**” (see next section for details).



15) Once the “**Grant Cycle Checklist**” is complete, the Affiliate can change the status as appropriate to close out the grant.



Grant Closeout

Once the Affiliate has approved the grantee's final report and received any unspent funds, the AGA will begin the grant closeout process in GeMS.

If your Affiliate has rescinded funds, follow the steps on page 102.

- 1) AGA logs into GeMS.
- 2) Click on "My CG Applications."



- 3) Search by status "CG Application: Grant Awarded" and click "Execute."

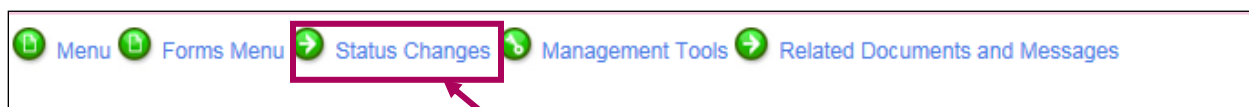
The screenshot shows the 'KOMEN Document Tab Search - CG Applications' search form. The form includes fields for CG Application Types, CG Application Name, Person, Status, Organization, and Year. The 'Status' dropdown menu is set to 'CG Application : Grant Awarded'. A callout box with a red border says 'Once selection is made, click "Execute"'. An arrow points to the 'EXECUTE' button in the top right corner of the form. Another arrow points to the 'Status' dropdown menu.

- 4) Select the name of the application for which you wish to begin the closeout process.

The screenshot shows the search results table. The table has columns: Document Type, Organization, Name, Current Status, Year, and No Cost Extension. The first row shows 'CG Application' for 'KOMEN Test Org 1' with the name 'CGA-2017-HQ001-KOMEN-00021' highlighted. An arrow points to the highlighted name.

Document Type	Organization	Name	Current Status	Year	No Cost Extension
CG Application	KOMEN Test Org 1	CGA-2017-HQ001-KOMEN-00021	Grant Awarded	2017	No

- 5) Hover over "Status Changes."



- 6) Select “Apply Status” under “Grant Closeout in Process.”

Possible Statuses

GRANT RESCINDED IN PROCESS

APPLY STATUS

GRANT CLOSEOUT IN PROCESS

APPLY STATUS ←

For the process to document a rescinded grant, see the previous section beginning on page 102.

The AGA will now complete the “Grant Cycle Checklist.”

- 7) Hover over “Forms Menu.”

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

- 8) Click on “Grant Cycle Checklist.”

Closeout

Grant Cycle Checklist ←

- 9) Complete the “Grant Cycle Checklist.”

GRANT CYCLE CHECKLIST

The purpose of the checklist below is to document that the grantmaking and grant management processes are satisfactorily completed. It's recommended that Affiliates complete the appropriate sections throughout the course of the grant cycle as they occur. Any special circumstances regarding the grant should be documented here.

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

Current Status of Grantee: ☐ Good Standing ☐ Not in Good Standing ← **Your Affiliate should have a BOD approved definition of “Good Standing”**

Item	Date Verified	Notes
Application Submitted		0 of 500
Compliance Review Complete		0 of 500
Application Review Complete		0 of 500

Some dates will autofill by GeMS, some you will need to manually enter.

Add notes as you choose for a more detailed grant file.

The screenshot shows a web form for 'Site Visit Completed'. It includes a 'Choose File' button and a 'No file chosen' label. A text box for 'If a site visit was not completed, please explain the circumstances.' is present. Below this is a 'Modification to Grant Submitted / Approved' section with 'Funding Returned' and 'Funding Rescinded' fields. There are also radio buttons for 'Extension Requested' and 'Extension Approved'. At the bottom, there is a 'Status at end of Grant Cycle:' section with four radio button options. Annotations with arrows point to specific parts of the form:

- An arrow points to the 'Choose File' button with the text: **Insert the completed site visit form or notes to be included with the grant file.**
- An arrow points to the 'Funding Returned' field with the text: **Returned Funds - are funds not expended by the grantee that were returned at the end of the grant cycle.**
- An arrow points to the 'Funding Rescinded' field with the text: **Insert the date the returned funds were received by the Affiliate.**
- An arrow points to the 'Status at end of Grant Cycle:' section with the text: **The amount will populate from the "Affiliate Review Form" from the Final Report.**
- An arrow points to the 'Status at end of Grant Cycle:' section with the text: **Rescinded Funds – Affiliate moves to terminate the grant – may be Affiliate initiated or the grantee may request (see Grantmaking Guide).**
- An arrow points to the 'Status at end of Grant Cycle:' section with the text: **Insert the date the BOD voted to rescind the grant.**
- An arrow points to the 'Status at end of Grant Cycle:' section with the text: **The amount will populate from the "Rescinded Grant Form" completed during the Rescinded Grant process detailed beginning on page 102.**

Helpful Hint:

Work on completing the "Grant Cycle Checklist" throughout the course of the year. It is always available under the **Forms Menu**. For example, after you complete a site visit, upload your notes or site visit form the same day.

See the Grantmaking Guide or talk with the Community Programs Team if you have questions about "Good Standing."

10) Click "Save."

The screenshot shows a navigation bar with the following links: **My Reports | My Administration | My Organization(s) | My Profile | Logout**. Below the navigation bar, there are four buttons: **SAVE**, **PRINT VERSION**, **ADD NOTE**, and **CHECK GLOBAL ERRORS**. The **SAVE** button is circled with a red line.

11) Hover over "Status Changes" and select "Apply Status" under the appropriate status.

The screenshot shows a section titled **Possible Statuses**. It contains two status options, each with an **APPLY STATUS** button and a red arrow pointing to it:

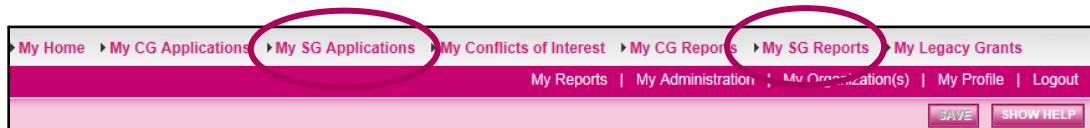
- GRANT CLOSED-GOOD STANDING** with an **APPLY STATUS** button.
- GRANT CLOSED-NOT IN GOOD STANDING** with an **APPLY STATUS** button.

Small Grants

The process for Small Grants (SG) in GeMS is nearly identical to the process for Community grants (CG).

Small Grant applications are found under “My SG Applications.”

Small Grant reports are found under “My SG Reports.”



The main differences between a Small Grant (SG) and Community Grant (CG) in GeMS are the review process and the payment process.

Review Process

For Small Grants, the AGA and AGM are automatically assigned as reviewers on applications. If the Affiliate does not want the AGA and/or AGM to be reviewers they can remove them using the “Reviewer Assignment” tool under “My Administration.”

The “Review Panel Documentation Sheet” and “Board Approved Grant Slate” are not required for Small Grants since these applications are reviewed on a rolling basis outside of the competitive peer review process.

Payment Process

Small Grant payments are processed through Rapid Invoice Entry (RIE), not through GeMS and the Accounts Payable team at Komen HQ like a Community Grant. You can find the Education, Screening, Treatment breakdown to complete the RIE on the “Grant Setup Overview Page.”

GRANT SETUP OVERVIEW	
This page provides an overview of the information the Accounting team uses to set up the grant payment including the total award amount, education, screening & treatment allocations, and the grantee contact information for payment.	
This page is informational only; no Affiliate action is needed on this page.	
Grant Activity Number	CGA-2017-HQ001-KOMEN-00021
Grant Start Date	4/1/2017
Grant End Date	3/31/2018
Award Fiscal Year	2017
Award Amount	\$100,200
Project Director	Daffy Duck
People Soft Vendor ID	0101010101
Education - 83020	25.00%
Screening - 83030	25.00%
Treatment - 83040	50.00%

For assistance with RIE, contact your Affiliate’s Financial Analyst.

The AGA should still complete the “Grant Payment Setup” page and the AGM should complete the “First Grant Payment” page even though payments are executed outside of the system to ensure proper record keeping in GeMS.

My Administration

Affiliate Grants Administrator View

My Administration

Select a link below to perform the action.

Organization/Person Administration

[Organization Administration](#)
[Person Search](#)
[User Management](#)

[User Management for System](#)
[Modify System Roles and Access](#)
[Create a Document](#)

[User Approval for Affiliate Administrators](#)
[User Approval for Project Directors](#)
[Reviewer Assignment](#)

[Final Scoring Sheet](#)
[Board Recommendation Sheet](#)

Design and Communication Tools

[Mass Messages](#)
[Affiliate Document Designer](#)

Document Administration

[Status Push Documents](#)
[Remap Document Instance](#)
[Purge Documents](#)

[Update Instance Dates](#)
[Update Document Due Date](#)

System Administration

[Report Builder](#)

Organization/Person Administration

Organization Administration: This link allows the user to search for organizations they have access to. From this link a user can access an organization's record and make edits as necessary.

Person Search: This link allows the user to search for individuals whose records they have access to. From this link a user can access an individual's record and make edits as necessary.

User Management: This link allows the user to **ADD** (and remove) users to multiple document(s) at one time. While adding users their roles can be changed or updated.

User Management for System: This link allows the user to remove, add and change a user's role for an organization.

Modify System Roles and Access: This link allows the user to modify one or more user's roles and system access dates.

Create a Document: This link allows the user to create/initiate a document (application/report) for organizations they have access to.

User Approval for Affiliate Administrators: This link allows the AGA to approve one or more users. This is the link the AGA should use to approve users.

Reviewer Assignment: This link is used to assign reviewers to applications when they are ready to be reviewed.

Design and Communication Tools

Mass Messages: This link allows the user to send out mass messages to any user for any category at any status.

Affiliate Document Designer: This link should not be used at this time.

Document Administration

Status Push Documents: This link allows the user to put any document (application/report) into any status. This link should be used sparingly and, if used, the notes section is required.

Remap Document Instance: This link allows the user to move a document to a different instance.

Purge Documents: This link allows the user to purge a document (application/report) from the system. **Using this link will completely delete the record from the system; there will be no back up for this task.** If the user is purging a document they need to be certain they no longer need the record.




Update Instance Dates: This link allows the user to modify the availability dates, the due date and the grant cycle for a specific document (application/report).

Update Document Due Date: This link allows the user to modify the due date for a specific document.

System Administration

Report Builder: This link allows the user the ability to add, edit and delete reports. This link will be used to create a report that does not already exist.

Affiliate Grants Manager (AGM) View

My Administration Select a link below to perform the action.	Notice: no links are present related to user approval or the review process, no link to push documents, change instance and due dates, etc.
Organization/Person Administration	
 Organization Administration  Person Search	
Document Administration	
System Administration	
 Report Builder	

Project Director View

My Administration Select a link below to perform the action.	The only action the Project Director can take is to approve users for their organization.
Organization/Person Administration	
 User Approval for Project Directors	

My Reports

My Reports

Select a report below to execute it.

Application Process Reports

- Application Objectives and Anticipated Number Served
- Application Summary Report
- Formal Partnerships and Collaborations
- List Of Abstracts By Category

Review Process Reports

- Application Review Status Report
- Application Review Summary Report
- Reviewer Questions Report
- Grant Slate for Board Approval (Formerly Slate Report)
- Review Panel Documentation Sheet (Formerly Final Scoring Sheet)
- Board Approved Grant Slate (Formerly Board Recommendation Sheet)

Award and Contract

- Funding Letter Mail Merge
- Funding Requested % By Funding Amount
- LOC Mail Merge
- Tax ID Search
- Unmet Need
- Vendor ID Search
- Vendor Information Report

Post-Award Reports

- Dashboard Report
- Document Modification History Report
- External Grantee List
- Individual Story Report
- Individual Story Report -Detailed
- Internal Grantee Contact Information
- Overdue Reports
- Rescinded Grants Report

Post Award Reports Specific to FY2012-FY2015

- Individuals Served Total Progress Reports
- Individuals Served Total Overview Progress Reports
- Individuals Served Total
- Individuals Served Total Overview
- Individuals Served Total Across Service Areas

Post Award Reports Specific to FY2016 and Beyond

- Service Overview
- Service Overview by County
- Service Overview by Special Population Group
- Service Overview by Grantee
- Breast Cancers Diagnosed Overview

Data Reports

- Funding History For An Organization
- Grants By Funding Category
- Grants By Intervention
- Grants By Organization Type
- Grants By Target Population
- History Of Funding By Year
- Keyword Search Report
- National Organization Search
- NBCCEDP Report

Legacy Data Reports

- Legacy Grants / Number Served

Application Review Process

Application Objectives and Anticipated Number Served: displays an overview of the objectives and anticipated number applicants propose to serve through their programs.

Application Summary Report: displays an overview of submitted applications including abstract and budget requests.

Formal Partnerships and Collaborations: all formal partners reported in application over a given period of time.

List of Abstracts by Category: all of the abstracts for a specific funding category.

Review Process Reports

Application Review Summary Report: a list of applications and reviewer scores and comments. This is the report the Affiliate will pull to verify that all applications are complete, by looking for “complete” in the comments of each application.

Reviewer Questions Report: a list of review responses specifically for a reviewer or application.

Grant Slate for Board Approval: the ranked order slate of applications.

Review Panel Documentation Sheet: This link is used during the review process and is what the AGA will use to make adjustments to an application’s rank on the slate during the review panel meeting.

Board Approved Grant Slate: This link is used during the review process and is what the AGA will use to report the Board Approval date and any funding adjustments during the annual grant slate Board meeting.

Award and Contract

Funding Letter Mail Merge: all pertinent information needed to conduct a mail merge to contact awarded grantees.

Funding Requested % By Funding Amount: the amount requested for each funding category and the percentage breakdown for each category.

LOC Mail Merge Report: all pertinent information needed to conduct a mail merge for the Letter of Clarification template (No longer functional, after GeMS process improvements).

Tax ID Search: the organizational information for the Tax ID being searched.

Unmet Need: a list of all applications in the status “Grant Approved Funding Not Available.”

Vendor ID Search: the organization information for the PeopleSoft Vendor ID being searched.

Vendor Information Report: vendor contact information for each grant.

Post-Award Reports Specific to FY2012-FY2015

Data will only populate in the “Post-Award Reports” if the report is in one of the following statuses “Progress Report Approved,” “Payment Processed,” or “Final Report Approved”

Dashboard Report: general overview of one or multiple grant cycles. This report can be provided to Board Members or used for an annual grant report.

Document Modification History Report: information about modifications that have been made to an application. Provides the original content and the updated content.

External Grantee List: the contact information for the community contact for each application during a given period of time. This is the information you can provide to the community when they request contact information for a grant program.

Individuals Served Total Progress Reports: demographic breakdown for any individual service within a given period of time based on the progress report and fiscal year.

Individuals Served Total Overview Progress Reports: the total number of each service provided during a given period of time based on the progress report and fiscal year.

Individuals Served Total: a demographic breakdown for any individual service within a given period of time.

Individuals Served Total Overview: the total number of each service provided during a given period of time.

Individual Story Report: all of the grantee stories provided during any given reporting period. This report will also include whether or not the grantee agrees to provide further information on this story for the Affiliate or Komen Headquarters.

Internal Grantee Contact Information: the contact information for the primary contact for each application during a given period of time. This list should be used by Affiliate staff or volunteers to conduct business related to the grant – these numbers should not necessarily be provided to the general public.

Overdue Reports: any grant that has not turned in a final or progress report within any given period of time.

Rescinded Grants Report: provides information on the Affiliate's rescinded grants activity.

Post-Award Reports Specific to FY2016 and Beyond

Service Overview: a demographic breakdown by service provided by all grantees.

Service Overview by County: a demographic breakdown by service and county provided by all grantees.

Service Overview by Special Population Groups: a demographic breakdown by service and special populations provided by all grantees.

Service Overview by Grantee: a demographic breakdown by service provided by each grantee.

Breast Cancer Diagnosed Overview: number and stages of breast cancer diagnosed by county.

Data Reports

Funding History for an Organization: the total number of grants and amount funded historically for each organization. This only pull from grants that were awarded.

Grants by Funding Category: the number of grants, the total amount funded, and a list of grants by funding category. **NOTE:** At this time, this report pulls all grants in any status, including grants that were not awarded.

Grants by Intervention: the number of grants, the total amount funded, and a list of grants by intervention. **NOTE:** At this time, this report pulls all grants in any status, including grants that were not awarded.

Grants by Organization Type: the number of grants, the total amount funded, and a list of grants by organization type. **NOTE:** At this time, this report pulls all grants in any status, including grants that were not awarded.

Grants by Target Population: the number of grants, the total amount, and a list of grants by target population. **NOTE:** At this time, this report pulls all grants in any status, including grants that were not awarded.

History of Funding by Year: a breakdown of the number of grants and the amount funded by fiscal year. **NOTE:** At this time, this report pulls all grants in any status, including grants that were not awarded.

Keyword Search Report: used for searching specific word(s). All applications that use the word(s) in a few key areas of the application will be listed.

NBCCEDP Report: a breakdown of the level of involvement with NBCCEDP over a given period of time. **NOTE:** At this time, this report pulls all grants in any status, including grants that were not awarded.

Legacy Data Reports

Legacy Grants/ Number Served: accesses information from the data available in the Legacy Grants Section.

Grantee Correspondence Log

The “Grantee Correspondence Log” is automatically generated by GeMS for each application and is not viewable by the grantee. This log is where the Affiliate should record any key pieces of communication related to the project. This log should include communication the Affiliate has directly with the grantee, in addition to communication about the project with Affiliate Leadership and/or Komen HQ.

- 1) To access the Grantee Correspondence Log, navigate to the application you wish to review, by clicking on “My CG Applications.”



- 2) Choose your search criteria and click “Execute.”

Back

KOMEN Document Tab Search - CG Applications

Document Tab Search

For more detailed instructions, select the **Show Help** button.

CG Application Types

CG Application Name

Person

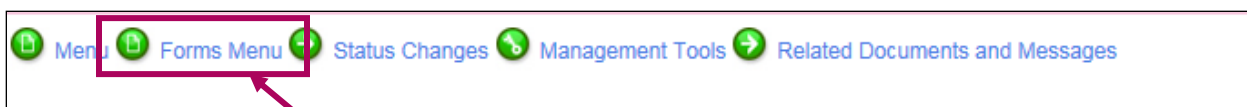
Status

Organization

Year

Export Results to Screen Results Per Page 20 Sort By -- SELECT -- ASCENDING

- 3) Hover over “Forms Menu.”



- 4) Click on “Grantee Correspondence Log.”



5) Enter appropriate information and click “Save.”

The screenshot shows the 'GRANTEE CORRESPONDENCE LOG' interface. At the top right, there are 'SAVE' and 'CHECK GLOBAL ERRORS' buttons. A pink oval highlights the 'SAVE' button with the text 'Click “Save” once all information has been entered'. Below the header, there is a 'Back' link and 'Document Information: CGA-2016-HQ001-SK'. A breadcrumb trail shows 'You are here: > CG Application Menu > Forms Menu'. The main section is titled 'GRANTEE CORRESPONDENCE LOG' and contains a table with columns 'Date' and 'Comments'. A pink box highlights the 'Comments' column with the text 'Details of communication – Who? What? When? Where? Why?'. To the right of the table, there is a 'Browse...' button. A pink box highlights this button with the text 'Attach relevant documentation, frequently this is a copy of email communication'. At the bottom of the table, it says '0 of 1000'.

Keeping track of communication in the grantee correspondence log is critical to having a complete grant file. Affiliates can choose whether to document every interaction they have with a grantee or only interactions of note.

Interactions of note would include (but are not limited to) correspondence regarding:

- Contract modifications
- Documentation requests
- Compliance issues
- Performance issues
- Program feedback the Affiliate receives from other grantees or the community
- Reporting deadline extensions
- Rescinded funds
- Grant amendments
 - Changes in staff
 - No-cost extensions
 - Budget changes

The Affiliate should track correspondence with Affiliate Leadership (Executive Director, Grants Committee, and/or Board) of conversations related to grantee performance.

Communication requesting guidance from Komen HQ on grantmaking related to a particular project should be recorded in the Grantee Correspondence log.

Note – all activity should be recorded in the “**Grantee Correspondence Log**” under the “**My CG Application**” tab, including conversations related to Progress and Final Reports.

When in doubt if communication should be recorded in the log, record the communication in the log.

Frequently Asked Questions

A user is leaving my organization. How do I remove their GeMS Access?

This can be done by inactivating the user in the system. This process is the same for Affiliate users and grantee users (grantees should inactivate their own users, with the exception of the Project Director – see below).

Simply navigate to “My Organizations” > “Organization Members” and add an inactive date for the user and click “Save.”

<input type="checkbox"/> Person	Role	Active Dates
<input checked="" type="checkbox"/> Greens, Wal	Affiliate Grants Admin	9/14/2015 -
<input checked="" type="checkbox"/> Test, testAGM	Affiliate Grants Manager	9/15/2015 -

Insert date that user should no longer be able to access GeMS (for example, their last day of employment, end of committee term, end of review process).

How can my Affiliate add a new AGA?

AGAs are the only users that must be approved by Komen HQ. Once the user has completed the registration process in GeMS, the Affiliate’s Executive Director simply fill out a support request on myKomen and request that the new AGA be added to the system and added to all existing documents.

How do I add a new Project Director?

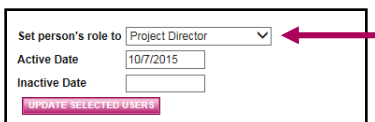
The AGA follows these steps only for the grantees’ Project Director (grantees can follow the steps below for all other users at their organization). Once the user has registered in GeMS the AGA can then approve that user and assign them the appropriate role.

Komen Headquarters recommends the grantee’s Authorized Signer confirm any changes in Project Director for GeMS.

Note: a change in GeMS Project Director (but not the named Project Director in the grant) does not require a grant change request since the GeMS user is not named in the grant application and may simply perform administrative duties related to the management of the grant.

The AGA will need to update several areas in GeMS to add the new Project Director:

- 1) “My Administration” > “Organization Administration” > (Find the appropriate organization) > “Organization Members” > make necessary changes to roles
- 2) “My Administration” > “User Management” > Search for the user > set their role as “Project Director”



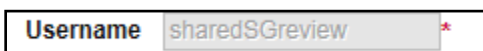
- 3) Confirm the former Project Director has been inactivated or role is changed in GeMS (the Project Director may not have left the organization, they may just have a new role on the project), so that the Application only has one Project Director attached.

A user has forgotten their username and can't login.

The AGA or AGM can use the “**Person Search**” tool under “**My Administration**” to search for the individual needing assistance by name. You can then pull up their information by clicking on their name.

Person	System Role	Begin Date / End Date	Organization	Organization Role	Begin Date / End Date
reviewer, test reviewer	Reviewer	07/23/2014	Special Grants	Reviewer	07/23/2014

This will pull up a screen with their username.



The username in GeMS cannot be changed.

The AGA or AGM can also change a user's password from this screen – by entering a new password and clicking “**Save.**”

A user has locked themselves out of their account.

Tell the user to wait 15 minutes and try logging in again. After three unsuccessful attempts to login, GeMS will reset after 15 minutes allowing the user to login in again.

A user would like to change their password.

They can do this by logging into GeMS and clicking on “**My Profile**” changing their password, and clicking “**Save.**”

Helpful Hints

- **Follow all processes exactly as they are outlined in the manual.**
- **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.
- If the “Save” button is present, save often for good measure. **If you do not click “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 a user 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 Microsoft Word, you must hit the backspace button within the text field for the character count to be shown.
- The “Project Work Plan Summary” is a report of the goal and all objectives entered on the “Project Work Plan – Goal and Objectives” page.
- Print versions of the blank application and completed application are available within the “Management Tools” section on any of the application pages.

Status Options in GeMS

Status	Definition	User type that can take action when application is in this status
Application Submission		
Application in Progress	Automatically occurs when application is initiated	Applicant
Application Cancelled	Only when an applicant is sure they do not want to submit the application	Affiliate
Authorized Signature Required	After the Project Director/Writer completes the entire application	Applicant
Application Submitted	Authorized Signer completes as final submission step	Affiliate
Application Modifications Required	After submission is complete, when changes are necessary	Applicant
Authorized Signature Required for Modifications	After the Project Director/Writer completes all necessary changes	Applicant
Application Modifications Submitted	Final submission by Authorized Signer / formal resubmission	Affiliate
Application Denied	The final status for an application which has major compliance issues and does not go to peer review	Affiliate
Application Review		
Application Review Required	After AGA assigns reviewers	Affiliate
Application Review Complete	After confirmation that all reviewers have completed their review -Grants that aren't recommended for funding remain in this status	Affiliate
Application Withdrawn	Applicant decides to withdrawn their application prior to the Board vote	Applicant
Application Not Approved for Funding	The final status for an application if the application is reviewed and is not included on the slate for board review.	Affiliate
Final Recommended Slate for Board Review	Following the rank adjustments established at the review panel meeting	Affiliate
Grant Approved Funding not Available	Grant eligible for funding but there are not enough funds available	Affiliate
Application Award Notification	After board approves slate and AGA enters approval date and funding amount – applying this status automatically changes the application to “Application Contract Pending”	Affiliate

Status	Definition	User type that can take action when application is in this status
Pre-Award Application Revisions Required	After board approves slate and AGA enters approval date and funding amount, when application and budget revisions are required prior to contract completion and approval	Grantee
Authorized Signature for Pre-Award Revisions	After the Project Director has made all of the necessary revisions	Grantee
Pre-Award Application Revisions Submitted	Final resubmission of application after revisions are made and reviewed	Affiliate
Award Declined	An applicant decided not to accept the grant award/proceed with the contract.	Grantee
Contract and Award		
Application Contract Pending	Automatically changed when the application is in “Application Award Notification” status	Affiliate
Contract Acceptance Required	After the contract template and the grant payment setup form is completed	Grantee
Contract Modifications Requested	Selected if the contract is not accepted as is and the grantee requests changes	Grantee
Contract Modifications Submitted	Final resubmission of the contract, after modifications form complete	Affiliate
Contract Accepted	Official acceptance of the contract by the grantee	Affiliate
Grant Awarded	After AGA has fully executed the contract and the AGM completes first grant payment form	Affiliate and/or Grantee
Grant Amendment		
Amendment Requested	Utilized when grantee needs to request a change to their grant	Grantee
Authorized Signature Required for Amendment Submission	After the Project Director completes the “Request for Grant Change form” and is ready to submit	Grantee
Amendment Submitted	Official submission, by the Authorized Signer, of the grant amendment	Affiliate
Grant Amendment Approved	If the Affiliate approves the request for grant change	Grantee
Rollback to Grant Awarded	If the Affiliate denies the request, reverting the grant back to “Grant Awarded”	Affiliate and/or Grantee

Status	Definition	User type that can take action when application is in this status
Authorized Signature Required for Amendment Resubmission	After the Project Director makes the necessary changes to the grant application to reflect the changes in the grant amendment	Grantee
Amendment Resubmitted	Official submission, by the Authorized Signer, of the changes to the application	Affiliate
Grant Awarded	After the Affiliate accepts the changes to the grant application as reflective of the approved amendment (<i>note – timing of this status is important in the process, as changing the status earlier is a denial of the request</i>)	Affiliate and/or Grantee
Amendment Modifications Required	Affiliate will apply this status if the changes made to the application are not correct	Grantee
Authorized Signature for Amendment Modifications	After the Project Director makes the necessary corrections to the grant application to reflect the changes in the grant amendment	Grantee
Amendment Modifications Submitted	Official resubmission, by the Authorized Signer, of the changes to the application	Affiliate
Progress Report		
Progress Report in Process	Utilized when the grantee needs to complete a progress report	Grantee
Authorized Signature Required	After the Project Director completes the progress report and is ready to submit	Grantee
Progress Report Submitted	Official submission, by the Authorized Signer, of the progress report	Affiliate
Progress Report Modifications Required	After the progress report has been reviewed, if changes are needed	Grantee
Authorized Signature Required for Modifications	After the Project Director makes all necessary changes and is ready for the Authorized Signer to formally resubmit	Grantee
Progress Report Modifications Submitted	Official resubmission of the progress report	Affiliate
Progress Report Approved	After report has been reviewed and no changes are necessary	Affiliate
Progress Report Not Approved	After report has been reviewed but grantee is nonresponsive to requests for modifications	Affiliate
Payment Processed	After AGM completes the grant payment form and initiated payment to the grantee	Affiliate

Status	Definition	User type that can take action when application is in this status
Final Report		
Final Report in Process	Utilized when the grantee needs to complete the final report	Grantee
Authorized Signature Required for Final Report	After the Project Director completes the final report and is ready to submit	Grantee
Final Report Submitted	Official submission, by the Authorized Signer, of the final report	Affiliate
Final Report Modifications Required	After the final report has been reviewed, if changes are needed	Grantee
Authorized Signature Required for Modifications of Final Report	After the Project Director makes all necessary changes and is ready for the Authorized Signer to formally resubmit	Grantee
Final Report Modifications Submitted	Official resubmission of the final report	Affiliate
Final Report Approved	After report has been reviewed and no changes are necessary	Affiliate
Final Report Not Approved	After report has been reviewed but grantee is nonresponsive to requests for modifications	Affiliate
Rescinding Funds		
Grant Rescinded in Process	If the Affiliate needs to rescind funds for a particular grant	Affiliate
Recommended for Board Rescind	After the AGA has completed the "Rescinded Grant Form"	Affiliate
Rescinded Grant Approved by Board	After the Affiliate Board of Directors has approved rescinding funding	Affiliate
Grant Awarded	If the Affiliate Board does not approve rescinding funding, returning the application to the original status	Affiliate and/or Grantee
Grant Closeout		
Grant Closeout in Process	At the end of the grant cycle following approval of the final report and receipt of any unspent grant funds (or following Board approval of rescinding funds) when the Affiliate is ready to close out the grant	Affiliate
Grant Closed – Good Standing	After completing the "Grant Cycle Checklist" if the grantee meets the Affiliate's definition for Good Standing	Affiliate

Status	Definition	User type that can take action when application is in this status
Grant Closed – Not in Good Standing	After completing the “Grant Cycle Checklist” if the grantee does not meet the Affiliate’s definition for Good Standing	Affiliate
Grant Closed – Rescinded Grant in Good Standing	After completing the rescinded funds process and “Grant Cycle Checklist” if the grantee meets the Affiliate’s definition for Good Standing	Affiliate
Grant Closed – Rescinded Grant Not in Good Standing	After completing the rescinded funds process and “Grant Cycle Checklist” if the grantee does not meet the Affiliate’s definition for Good Standing	Affiliate

Creating Organization Identifiers (Short Names)

When a new organization registers in GeMS, the AGA creates an **Organization Identifier (OI) /Short Name** for the organization.

The short name will appear in the name of all documents attached to the organization.

Example of an OI/short name:

CGA-2014-DC100-CAPI33-00013

CAPI is the OI/short name for the Capital Breast Care Center + 33 which is the National Capital Region's unique number

Instructions for Assigning Organization Identifiers (OI)/ Short Names:

- To determine the Organization Identifier (OI) take the first four letters of the organization's name. For instance, Community Health Centers, Inc. would be "COMM"
- After the first four letters you will add the Affiliate's unique number that was assigned by Headquarters (see following pages)
 - The OI for Community Health Centers, Inc. associated with the Central and Western Oklahoma Affiliate would be COMM9
 - If the same organization existed in Columbus, the OI would be COMM25
- If there are two organizations in an Affiliate domain with the same first four letters, you can take the first two letters of the first two words. For example, Community Health Center, Inc. would become COHE.

Key Rules for assigning Organization Identifiers/Short Names:

- You must always include your Affiliate's unique number at the end of each OI.
- The OI should never be more than 7 characters.

Affiliate	Number for short name
Acadiana Affiliate	1
Arkansas Affiliate	2
Austin Affiliate	4
Baton Rouge Affiliate	5
Central and South Jersey Affiliate	8
Central and Western Oklahoma Affiliate	9
Central Florida Affiliate	10
Central Georgia Affiliate	11
Central Indiana Affiliate	12
Central Mississippi Steel Magnolias Affiliate	13
Central New York Affiliate	15
Central Virginia Affiliate	18
Charlotte Affiliate	20
Greater Chicagoland Area Affiliate	22
Coastal Georgia Affiliate	23
Idaho Montana Affiliate	24
Columbus Affiliate	25
New England Affiliate	26
Dallas County Affiliate	27
Colorado Affiliate	28
Florida Suncoast Affiliate	32
Global Race for the Cure® (Washington DC)	33
Greater Atlanta Affiliate	36
Southwest Ohio Affiliate	37
Evansville Tri-State Affiliate	38
Greater Fort Worth Affiliate	39
Greater Kansas City Affiliate	40
Central Tennessee Affiliate	41
Greater NYC Affiliate	42
Hawaii Affiliate	44
Special Grants	45
Susan G. Komen Headquarters (HQ002)	45
Houston Affiliate	46
Inland Empire Affiliate	47
East Tennessee Affiliate	48
Greater Detroit Affiliate	49
Los Angeles County Affiliate	51
Kentucky Affiliate	52
South Carolina Affiliate	53
West Texas Affiliate	54

Affiliate	Number for short name
Maryland Affiliate	57
Memorial Affiliate	60
Memphis-MidSouth Affiliate	61
Miami/Ft. Lauderdale Affiliate	62
Kansas Affiliate	63
Minnesota Affiliate	66
NC Triangle to the Coast Affiliate	69
Great Plains Affiliate	70
New Orleans Affiliate	71
Northwest NC Affiliate	72
North Central Alabama Affiliate	73
North Florida Affiliate	75
North Jersey Affiliate	76
North Mississippi Affiliate	77
North Texas Affiliate	78
Northeast Ohio Affiliate	79
Northeastern New York Affiliate	81
Northeastern Pennsylvania Affiliate	82
Northwest Louisiana Affiliate	85
Northwest Ohio Affiliate	86
Orange County Affiliate	87
Oregon and SW Washington Affiliate	88
Ozark Affiliate	89
Philadelphia Affiliate	90
Arizona Affiliate	91
Pittsburgh Affiliate	92
Puget Sound Affiliate	93
Northern & Central California Affiliate	95
Utah Affiliate	96
San Antonio Affiliate	97
San Diego Affiliate	98
San Francisco Bay Area Affiliate	99
South Florida Affiliate	103
Wisconsin Affiliate	105
Southeastern Colorado Affiliate	106
Nevada Affiliate	108
Southwest Florida Affiliate	109
Missouri Affiliate	111
Tidewater Affiliate	113
Tulsa Affiliate	115
Twin Tiers Region Affiliate	116
East Central Texas Affiliate	117

Upper Cumberland Affiliate	118
West Virginia Affiliate	121
Western New York Affiliate	122
Iowa Affiliate	125
Virginia Blue Ridge Affiliate	130
Michigan Affiliate	131

Submitting a Support Request

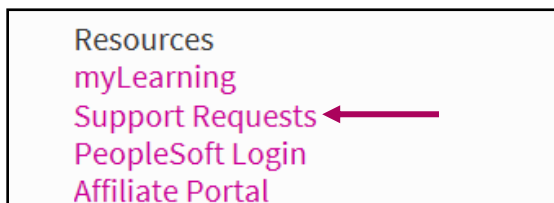
This process is only for Affiliate users with access to myKomen.

If your applicants/grantees/reviewers are having technical issue:

- The Affiliate should first help to trouble shoot using the manual. Oftentimes a user isn't following the steps exactly as outlined or the application/report is in the wrong status and the Affiliate can solve issues on their own.
- If you cannot resolve the issue, submit a Support Request.

1) Login to **myKomen** (www.myKomen.org).

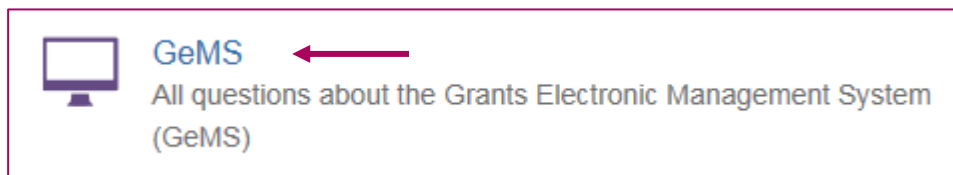
2) Scroll to the bottom of the page and click on "Support Requests."



3) Select "Mission Support."



4) Click on "GeMS."



- 5) Fill out the support request in its entirety. The more information that you can provide initially, including specifics like the application name/document identifier, the more quickly the team at HQ will be able to provide a response.

Business Unit ID (BUID)*

None

Department*

Affiliate

Requester's Department

How can we help?*
Brief Summary of your issue - This will appear as the SUBJECT Line in all related email notifications

GeMS Issue Type*

None

Description*
Additional details pertinent to your request

Name & Role of User Experiencing the Issue*

Document ID*
Examples: CGA-2014-CA106-ALTAA99-00026, CGPR-2016-TX102-FQH1-00007, CGFR-2016-TX100-FQH5-00001

Organization Name*
For Example: MD Anderson Cancer Center

Due Date*
Please allow a minimum of 3 business days to process your request

Priority (optional)

Medium

Attachment (optional)

Drag and drop files, paste screenshots, or [browse](#)

To expedite your resolution, additional information such as screen shots, error messages, etc. are highly encouraged. ****Helpful Hint: You can paste straight from a windows snipping tool and highlight or draw on the example for clarification.

Create

Cancel

The more information you provide in your initial request the better.

Make use of this option to include screen shots and other supplemental information.

Community Grants Application					
Ref #	Status Name	To	CC	Subject	Notification Content
Community Grants Application					
1	Authorized Signature Required	Authorized Signer		{DocumentIdentifier}/ Authorized Signature Required	The application, {DocumentIdentifier}, has been submitted by {EventPersonNameFirstLast} for your signature. Please remember that your submission is required prior to {DocumentDueDate}. Directions for submitting an application:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org .Select "My Tasks" under My Tasks.Select the name of the application in "Authorized Signature Required" status.Hover over "Forms Menu" to review the application pages.If you approve, hover over "Status Changes" and select "Application Submitted" to complete the submission process. {EventDomain} This is an automated email, please do not reply.
2	Application Submitted	Project Director	Authorized Signer	{DocumentIdentifier}/ Application Submitted	Thank you for submitting your application for review. The application, {DocumentIdentifier}, has been officially submitted to {EventDomain}. The Affiliate will continue with the review process and will contact you once a decision has been made regarding your application. {EventDomain} This is an automated email, please do not reply.
3	Application Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Application Submitted	{DocumentIdentifier} has been successfully submitted by {OrganizationName}. This application is now ready for the compliance review process. This is an automated email, please do not reply.
4	Application Modifications Required	Project Director	Authorized Signer	{DocumentIdentifier} / Application Modifications Required	The compliance review for {DocumentIdentifier} has been completed and there are areas of the application where additional information is needed before the application can continue through the review process. Please return to your application to address the requested modifications. Directions for resubmitting an application with modifications:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks.Select the name of the application in "Application Modifications Required" status.Hover over "Forms Menu" to review the application pages.Once the modifications have been made, hover over "Status Changes" and select "Authorized Signature Required for Modifications." If you have any questions regarding the required modifications within your application, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
5	Authorized Signature Required for Modifications	Authorized Signer		{DocumentIdentifier} / Authorized Signature Required for Modifications	The compliance review for {DocumentIdentifier} was completed and there were areas of the application where additional information was needed before the application could continue through the review process. {EventPersonNameFirstLast} has reviewed the required modifications and made the necessary changes to the application. Before the application can continue through the review process, you must return to GeMS and resubmit the application. Directions for resubmitting an application:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks.Select the name of the application in "Authorized Signature Required for Modifications" status.Hover over "Forms Menu" to review the application pages.If you approve, hover over "Status Changes" and select "Application Modifications Submitted" to complete the submission process. {EventDomain} This is an automated email, please do not reply.
6	Application Modifications Submitted	Project Director	Authorized Signer	{DocumentIdentifier} / Application Modifications Submitted	Thank you for addressing the areas where additional information was needed. The application, {DocumentIdentifier}, has been officially resubmitted to {EventDomain}. The Affiliate will continue with the review process and will contact you once a decision has been made regarding your application. {EventDomain} This is an automated email, please do not reply.
7	Application Modifications Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Application Modifications Submitted	{DocumentIdentifier} has been successfully resubmitted by {OrganizationName}. This applicant has reviewed all of the required modifications and made changes to the application. This is an automated email, please do not reply.
8	Application Withdrawn	Project Director	Authorized Signer	{DocumentIdentifier} / Application Withdrawn	{DocumentIdentifier} has been withdrawn from funding consideration. Please contact the Affiliate immediately if the status was changed in error. This is an automated email, please do not reply.
9	Application Withdrawn	Affiliate Grants Admin		{DocumentIdentifier} / Application Withdrawn	{OrganizationName} has withdrawn their application {DocumentIdentifier} for consideration. Please contact the applicant immediately if you have any questions or if you believe this was changed in error. This is an automated email, please do not reply.

Community Grants Application					
Ref #	Status Name	To	CC	Subject	Notification Content
Community Grants Application					
10	Application Review Required	Reviewer		{DocumentIdentifier} / Application Review Required	<p>Thank you for your commitment to {EventDomain} and agreeing to be a member of the {DocumentTemplateInstanceSubCode} community grant review panel.

 {DocumentIdentifier} was submitted by {OrganizationName} and is now available for review.

 If you believe you may have a conflict of interest with {OrganizationName} please contact {EventPersonNameFirstLast} at {EventPersonEmail} to disclose the conflict prior to reviewing the application.

 Directions for reviewing an application:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org.Select "Open My Tasks" under My Tasks.Select the name of the application in "Application Review Required" status. Hover over "Forms Menu" to review the application pages.Once you have reviewed the application pages, select the "Peer Review" link under "Forms Menu."Select the "Review Panel" button on the upper right side of the screen.The review categories and scoring will be available for your input.Select "Save" to save the information inputted. Directions for printing an application:<ol style="margin-left:20px">Select the name of the application you would like to print.Hover over "Management Tools" button.Select the "Create a full print version" link. {EventDomain}

 This is an automated email, please do not reply.</p>
11	Application Award Notification	Project Director	Authorized Signer	{DocumentIdentifier} / Application Award Notification	<p>Congratulations! The grant application you submitted has been approved for funding by {EventDomain}. The grant award is contingent on your organization executing a grant agreement with Komen and we will notify you as soon as a contract is available for your review.

 We are excited about this grant and the work that can be achieved in our continued efforts to move closer to fulfilling the promise of Susan G. Komen - Save lives by meeting the most critical needs in our communities and investing in breakthrough research to prevent and cure breast cancer.

 If you have any questions regarding your application's approval for funding, please contact {EventPersonNameFirstLast} at {EventPersonEmail}.

 {EventDomain}

 This is an automated email, please do not reply.</p>
12	Pre-Award Application Revisions Required	Project Director	Authorized Signer	{DocumentIdentifier} / Application Revisions Required	<p>Congratulations! The grant application you submitted has been tentatively approved for funding by {EventDomain}.

This grant approval is contingent upon your organization agreeing to make changes to the original submitted application. Please return to your application to address the requested revisions.

Directions for resubmitting an application with revisions:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org.Select "Open My Tasks" under My Tasks. Select the name of the application in "Pre-Award Application Revisions Required" status. Hover over "Forms Menu" to review the application pages. Once the revisions have been made, hover over "Status Changes" and select "Authorized Signature for Pre-Award Revisions."

 If you have any questions regarding the necessary application revisions, please contact {EventPersonNameFirstLast} at {EventPersonEmail}.

 {EventDomain}

 This is an automated email, please do not reply.</p>
13	Authorized Signature for Pre-Award Revisions	Authorized Signer		{DocumentIdentifier} / Authorized Signature for Pre-Award Revisions	<p>The grant application you submitted has been tentatively approved for funding by {EventDomain}.

This grant approval is contingent upon your organization agreeing to make changes to the original submitted application. {EventPersonNameFirstLast} has reviewed the required revisions and made the necessary changes to the application. Before the application can continue through the process, you must return to GeMS and resubmit the application.

Directions for resubmitting an application with revisions:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org. Select "Open My Tasks" under My Tasks. Select the name of the application in "Authorized Signature for Pre-Award Revisions" status. Hover over "Forms Menu" to review the application pages. If you approve of the changes, hover over "Status Changes" and select "Pre-Award Application Revisions Submitted" to complete the submission process.

 If you have any questions regarding the necessary application revisions, please contact {EventPersonNameFirstLast} at {EventPersonEmail}.

 {EventDomain}

 This is an automated email, please do not reply.</p>

Community Grants Application					
Ref #	Status Name	To	CC	Subject	Notification Content
Community Grants Application					
14	Pre-Award Application Revisions Submitted	Project Director	Authorized Signer	{DocumentIdentifier} /Application Revisions Submitted	The application, {DocumentIdentifier}, has been officially resubmitted to {EventDomain}. The Affiliate will review the revisions and continue with the award process if approved. {EventDomain} This is an automated email, please do not reply.
15	Pre-Award Application Revisions Submitted	Affiliate Grants Admin		{DocumentIdentifier} /Application Revisions Submitted	{DocumentIdentifier} has been successfully resubmitted by {OrganizationName}. This applicant has reviewed all of the required revisions and made changes to the application. Please review the changes and continue with the contracting process if revisions are approved. This is an automated email, please do not reply.
16	Contract Acceptance Required	Project Director	Authorized Signer	{DocumentIdentifier} / Contract Acceptance Required	{EventDomain} has completed the grant contract for {DocumentIdentifier} and needs your organization to review and accept the grant agreement in GeMS. Once the contract has been executed and accepted by both the grantee and Komen, the first installment of funds will be issued per the terms of the grant agreement. Please remember that only the authorized signer will be able to complete this task and contract acceptance in the system is legally binding. Directions for accepting the contract:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org Select "Open My Tasks" under My Tasks. Select the name of the application in "Contract Acceptance Required" status.Hover over "Forms Menu" and select the "Contract Acceptance" link.Upload your W9 and Insurance certification forms.Review the contract.Select either the "I Agree" or "I Decline" box and press "Save."Hover over "Status Changes" and select "Contract Accepted" if you agree to the contract terms.Select "Contract Modifications Requested" and complete the Contract Modifications page if you do not agree to the contract terms. Once you have completed the page and pressed save, hover over "Status Changes" and select "Contract Modifications Submitted." If you have any questions regarding contract acceptance, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
17	Contract Modifications Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Contract Modifications Submitted	{DocumentIdentifier} submitted by {OrganizationName} has requested contract modifications. Please work with your Board of Directors and local counsel to establish if the requests are acceptable. This is an automated email, please do not reply.
18	Contract Acceptance Required	Project Director	Authorized Signer	{DocumentIdentifier} / Contract Acceptance Required	{EventDomain} has uploaded a Letter of Clarification for the grant contract for {DocumentIdentifier} and needs your organization to review and accept the grant agreement in GeMS. Once the contract is accepted, the first installment of funds will be issued per the terms of the grant agreement. Please remember that only the authorized signer will be able to complete this task and contract acceptance in the system is legally binding. Directions for accepting the contract:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org Select "Open My Tasks" under My Tasks. Select the name of the application which is in "Contract Acceptance Required" status.Hover over "Forms Menu" and select the "Contract Acceptance" link.Review the Letter of Clarification.Select either the "I Agree" or "I Decline" box and press "Save."Hover over "Status Changes" and select "Contract Accepted" if you agree to the contract terms and the Letter of Clarification.Select "Contract Modifications Requested" and complete the Contract Modifications page if you do not agree to the contract terms and the Letter of Clarification. Once you have completed the page and pressed save, hover over "Status Changes" and select "Contract Modifications Submitted." If you have any questions regarding contract acceptance, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
19	Award Declined	Project Director	Authorized Signer	{DocumentIdentifier} /Award Declined	{OrganizationName} has declined the award for application {DocumentIdentifier}. Please contact the Affiliate immediately if the status was changed in error. This is an automated email, please do not reply.
20	Award Declined	Affiliate Grants Admin		{DocumentIdentifier} /Award Declined	{OrganizationName} has declined the award for application {DocumentIdentifier}. Please contact the Community Programs team at Komen HQ for guidance on how to proceed with the appropriate next steps. This is an automated email, please do not reply.

Community Grants Application					
Ref #	Status Name	To	CC	Subject	Notification Content
Community Grants Application					
21	Contract Accepted	Affiliate Grants Admin		{DocumentIdentifier} / Contract Accepted	The Authorized Signer for {DocumentIdentifier} has accepted the contract. Please login to GeMS and accept the contract on behalf of the Affiliate. Directions for accepting the contract:Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks. Select the name of the application in "Contract Accepted" status. Hover over "Forms Menu" and select the "Contract Acceptance" page.Review the Grantee's Insurance Certification and W9.If approved, please sign the contract by checking the box next to "Affiliate confirms acceptance of grant agreement." The AGM will login, complete the First Grant Payment page. Once the First Grant Payment page is completed, login to GeMS, review the First Grant Payment page and change the status to "Grant Awarded." This is an automated email, please do not reply.
22	Grant Awarded	Project Director	Authorized Signer	{DocumentIdentifier} / Grant Awarded	Thank you for submitting the fully executed contract. {EventDomain} is excited to partner with you throughout this grant cycle. Your first payment will now be issued per the terms of the grant agreement. If you have any questions regarding the first payment or the remainder of the grant process, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
Amendment Process					
1	Authorized Signature Required for Amendment Submission	Authorized Signer		{DocumentIdentifier} / Authorized Signature Required For Amendment Submission	An amendment to the grant application, {DocumentIdentifier}, has been requested by {EventPersonNameFirstLast}. Please return to your application to officially submit the amendment request. Directions for submitting an amendment request:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org . Select "Open My Tasks" under My Tasks. Select the name of the application in "Authorized Signature Required for Amendment Submission" status. Hover over "Forms Menu" and select "Request for Grant Change" to review the amendment request.If you approve, hover over "Status Changes" and select "Amendment Submitted" to complete the submission process. {EventDomain} This is an automated email, please do not reply.
2	Amendment Submitted	Authorized Signer	Project Director	{DocumentIdentifier} / Amendment Submitted	Thank you for submitting your amendment for review. The amendment for application, {DocumentIdentifier}, has been officially submitted to {EventDomain}. The Affiliate will review the amendment and will contact you if any further information is needed. {EventDomain} This is an automated email, please do not reply.
3	Amendment Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Amendment Submitted	An amendment for application, {DocumentIdentifier} has been successfully submitted by {OrganizationName}. This amendment is now ready for review. This is an automated email, please do not reply.
4	Amendment Denied	Authorized Signer	Project Director	{DocumentIdentifier} / Amendment Denied	Thank you for all of your continued work throughout the grant cycle and for submitting an amendment for application, {DocumentIdentifier}. The amendment for application, {DocumentIdentifier}, has been reviewed and is not approved. If you have any questions regarding your amendment status, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
5	Amendment Revisions Requested	Project Director	Authorized Signer	{DocumentIdentifier} / Amendment Revisions Requested	The review of the amendment request submitted for application, {DocumentIdentifier} was completed and there are areas where additional information is needed. Please return to your application to make the required modifications to the "Request for Grant Change" form. Directions for revising an amendment request:Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks. Select the name of the application in "Amendment Requested" status. Hover over "Forms Menu" and select the "Request for Grant Change" form.Please make the required changes. Hover over "Status Changes" and select "Authorized Signature Required For Amendment Submission." {EventDomain} This is an automated email, please do not reply.

Community Grants Application					
Ref #	Status Name	To	CC	Subject	Notification Content
Amendment Process					
6	Grant Amendment Approved	Authorized Signer	Project Director	{DocumentIdentifier} / Grant Amendment Approved	Thank you for all of your continued work throughout the grant cycle and for submitting an amendment for application, {DocumentIdentifier}. The amendment has been reviewed and approved. Please return to your original application and make the approved changes to the necessary application pages. Directions for resubmitting an application with amendment changes: <ol style="list-style-type: none">Log into GeMS, https://affiliategrants.komen.org.Select "Open My Tasks" under My Tasks.Select the name of the application in "Grant Amendment Approved" status.Hover over "Forms Menu" and select and update the application pages based on the approved amendment.Once all approved changes have been made, hover over "Status Changes" and select "Authorized Signature Required for Amendment Resubmission." If you have any questions regarding your amendment's approval, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. This is an automated email, please do not reply.
7	Authorized Signature Required for Amendment Resubmission	Authorized Signer		{DocumentIdentifier} / Authorized Signature Required for Amendment Resubmission	The review of the amendment submitted for application, {DocumentIdentifier} was completed and approved. {EventPersonNameFirstLast} has made the necessary changes to the original application to reflect the approved changes. You must return to GeMS and resubmit your application with the approved changes. Directions for resubmitting an application with approved amendment changes: <ol style="list-style-type: none">Log into GeMS, https://affiliategrants.komen.org.Select "Open My Tasks" under My Tasks.Select the name of the application in "Authorized Signature Required for Amendment Resubmission."Hover over "Forms Menu" and select and review the application pages which have been amended.Hover over "Status Changes" and select "Amendment Resubmitted" to complete the resubmission process. {EventDomain} This is an automated email, please do not reply.
8	Amendment Resubmitted	Authorized Signer	Project Director	{DocumentIdentifier} / Amendment Resubmitted	Thank you for amending your original application based on the approved amendments. The application reflecting the approved amendment changes, {DocumentIdentifier}, has been officially resubmitted to {EventDomain}. The Affiliate will contact you if any further information is needed. This is an automated email, please do not reply.
9	Amendment Resubmitted	Affiliate Grants Admin		{DocumentIdentifier} / Amendment Resubmitted	The application reflecting the approved amendment changes, {DocumentIdentifier} has been successfully resubmitted by {OrganizationName}. This project director has now made all of the required modifications to the original application and the application is ready for your review and approval. This is an automated email, please do not reply.
10	Grant Awarded	Authorized Signer	Project Director	{DocumentIdentifier} / Grant Awarded	The application reflecting the approved amendment changes, {DocumentIdentifier}, has been officially approved and completed by {EventDomain}. You can now make any necessary change at your organization to move forward with the amendments that have been approved. This is an automated email, please do not reply.
11	Amendment Modifications Required	Authorized Signer	Project Director	{DocumentIdentifier} / Amendment Modifications Required	The changes made to the application, {DocumentIdentifier}, during the amendment process have been reviewed and there are areas of the application where additional information is needed before the amendment process can be completed. Please return to your application and address the required modifications. Directions for resubmitting an application with amendment changes: <ol style="list-style-type: none">Log into GeMS, https://affiliategrants.komen.org.Select "Open My Tasks" under My Tasks.Select the name of the application in "Amendment Modifications Required" status.Hover over "Forms Menu" and select and update the application pages based the requested modifications.Once all modifications have been made, hover over "Status Changes" and select "Apply Status" under "Authorized Signature Required for Amendment Modifications." If you have any questions regarding the required modifications within your application, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. This is an automated email, please do not reply.

Community Grants Application					
Ref #	Status Name	To	CC	Subject	Notification Content
Amendment Process					
12	Authorized Signature Required for Amendment Modifications	Authorized Signer		{DocumentIdentifier} / Authorized Signature Required for Amendment Modifications	The changes made to the application, {DocumentIdentifier}, during the amendment process have been reviewed and there were areas of the application where additional information was needed before the amendment can be officially completed. {EventPersonNameFirstLast} has reviewed the required modifications and made the necessary changes to the application. Before the application can continue through the amendment process, you must return to GeMS and resubmit your amendment modifications. Directions for resubmitting the amendment modifications:<ol style="margin-left:20px">Log into GeMS, https://affiliate.grants.komen.org .Select "Open My Tasks" under My Tasks.Select the name of the application in "Amendment Modifications Required" status.Hover over "Forms Menu" and review the application pages based the requested modifications. If you approve, hover over "Status Changes" and select "Amendment Modifications Resubmitted" to complete the resubmission process. {EventDomain} This is an automated email, please do not reply.
13	Amendment Modifications Resubmitted	Authorized Signer	Project Director	{DocumentIdentifier} / Amendment Modifications Resubmitted	Thank you for making all necessary changes on the original application pages to complete the grant amendment process. The amendment for application, {DocumentIdentifier}, has been officially resubmitted to {EventDomain}. The Affiliate will contact you if any further information is needed. {EventDomain} This is an automated email, please do not reply.
14	Amendment Modifications Resubmitted	Affiliate Grants Admin		{DocumentIdentifier} / Amendment Modifications Resubmitted	The amendment for application, {DocumentIdentifier} has been successfully resubmitted by {OrganizationName}. This project director has made all of the required modifications to the original application. This is an automated email, please do not reply.
Community Grants Progress Report					
1	Authorized Signature Required	Authorized Signer		{DocumentIdentifier} / Authorized Signature Required (Progress Report)	The progress report for the application, {DocumentIdentifier}, has been submitted by {EventPersonNameFirstLast} for your signature. Please remember that your submission is required prior to {DocumentDueDate}. Directions for submitting a progress report:Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks. Select the name of the progress report in "Authorized Signature Required" status.Hover over "Forms Menu" to review the progress report pages.If you approve, hover over "Status Changes" and select "Progress Report Submitted" to complete the submission process.{EventDomain} This is an automated email, please do not reply.
2	Progress Report Submitted	Authorized Signer	Project Director	{DocumentIdentifier} / Progress Report Submitted	Thank you for submitting your progress report for review. The progress report for application, {DocumentIdentifier}, has been officially submitted to {EventDomain}. The Affiliate will review the progress report and will contact you if any further information is needed. {EventDomain} This is an automated email, please do not reply.
3	Progress Report Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Progress Report Submitted	A progress report for application, {DocumentIdentifier} has been successfully submitted by {OrganizationName}. This progress report is now ready for review. This is an automated email, please do not reply.
4	Progress Report Modifications Required	Project Director	Authorized Signer	{DocumentIdentifier} / Progress Report Modifications Required	The review of the progress report submitted for application, {DocumentIdentifier} has been completed and there are areas of the progress report where additional information is needed. Please return to your progress report to make the required modifications. Directions for resubmitting a progress report with modifications:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org . Select "Open My Tasks" under My Tasks.Select the name of the progress report in "Progress Report Modifications Required" status. Hover over "Forms Menu" to review the progress report pages. Once the modifications have been made, hover over "Status Changes" and select "Authorized Signature Required for Modifications." If you have any questions regarding the required modification within your application, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.

Community Grants Application					
Ref #	Status Name	To	CC	Subject	Notification Content
Community Grants Progress Report					
5	Authorized Signature Required for Modifications	Authorized Signer		{DocumentIdentifier} / Authorized Signature Required for Progress Report Modifications	The review of the progress report submitted for application, {DocumentIdentifier} was completed and there were areas of the progress report where additional information was needed. {EventPersonNameFirstLast} has reviewed the required modifications and made the necessary changes to the progress report. You must return to GeMS and resubmit the progress report. Directions for resubmitting a progress report:Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks. Select the name of the progress report in "Authorized Signature Required for Modifications" status. Hover over "Forms Menu" to review the progress report pages.If you approve, hover over "Status Changes" and select the option "Progress Report Modifications Submitted" to complete the resubmission process.{EventDomain} This is an automated email, please do not reply.
6	Progress Report Modifications Submitted	Authorized Signer	Project Director	{DocumentIdentifier} / Progress Report Modifications Submitted	Thank you for reviewing the areas where additional information was needed and for making changes to your progress report. The progress report for application, {DocumentIdentifier}, has been officially resubmitted to {EventDomain}. The Affiliate will contact you if any further information is needed. {EventDomain} This is an automated email, please do not reply.
7	Progress Report Modifications Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Progress Report Modifications Submitted	The progress report for application, {DocumentIdentifier} has been successfully resubmitted by {OrganizationName}. This project director has now reviewed all of the required modifications and made changes to the progress report. This is an automated email, please do not reply.
8	Progress Report Approved	Authorized Signer	Project Director	{DocumentIdentifier} / Progress Report Approved	Thank you for all of your continued work throughout the grant cycle and for completing the progress report for application, {DocumentIdentifier}. The progress report for application, {DocumentIdentifier}, has been reviewed and approved. If you have any questions regarding your progress report's approval, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
9	Progress Report Not Approved	Authorized Signer	Project Director	{DocumentIdentifier} / Progress Report Not Approved	The review of the progress report submitted for application, {DocumentIdentifier} has been completed and the progress report has not been approved. If you have any questions regarding the decision regarding the progress report, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
10	Payment Processed	Authorized Signer	Project Director	{DocumentIdentifier} / Payment Processed	Thank you for successfully completing the progress report for application, {DocumentIdentifier}. {EventDomain} will now issue the next installment of grant funds per the terms of the grant agreement. If you have any questions regarding the payment, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
Community Grants Final Report					
1	Authorized Signature Required	Authorized Signer		{DocumentIdentifier} / Authorized Signature Required (Final Report)	The final report for the application, {DocumentIdentifier}, has been submitted by {EventPersonNameFirstLast} for your signature. Please remember that your submission is required prior to {DocumentDueDate}. Directions for submitting a final report:Log into GeMS, https://affiliategrants.komen.org . Select "Open My Tasks" under My Tasks. Select the name of the final report in "Authorized Signature Required for Final Report" status.Hover over "Forms Menu" to review the final report pages. If you approve, hover over "Status Changes" and select "Final Report Submitted" to complete the submission process.{EventDomain} This is an automated email, please do not reply.
2	Final Report Submitted	Authorized Signer	Project Director	{DocumentIdentifier} / Final Report submitted	Thank you for submitting your final report for review. The final report for application, {DocumentIdentifier}, has been officially submitted to {EventDomain}. The Affiliate will review the final report and will contact you if any further information is needed. {EventDomain} This is an automated email, please do not reply.
3	Final Report Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Final Report submitted	A final report for application, {DocumentIdentifier} has been successfully submitted by {OrganizationName}. This final report is now ready for review. This is an automated email, please do not reply.

Community Grants Application					
Ref #	Status Name	To	CC	Subject	Notification Content
Community Grants Final Report					
4	Final Report Modifications Required	Project Director	Authorized Signer	{DocumentIdentifier} / Final Report Modifications Required	The review of the final report submitted for application, {DocumentIdentifier} has been completed and there are areas where additional information is needed. Please return to your final report to make the required modifications. Directions for resubmitting a final report with modifications:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks.Select the name of the final report in "Final Report Modifications Required" status.Hover over "Forms Menu" to review the progress report pages.Once the modifications have been made, hover over "Status Changes" and select "Authorized Signature Required for Modifications." If you have any questions regarding the required modification within your application, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
5	Authorized Signature Required for Modifications	Authorized Signer		{DocumentIdentifier} / Authorized Signature Required for Final Report Modifications	The review of the final report submitted for application, {DocumentIdentifier} was completed and there were areas where additional information was needed. {EventPersonNameFirstLast} has reviewed the required modifications and made the necessary changes. You must return to GeMS and resubmit your final report. Directions for resubmitting a final report:Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks.Select the name of the final report in "Authorized Signature Required for Modifications" status.Hover over "Forms Menu" to review the final report pages.If you approve, hover over "Status Changes" and select "Final Report Modifications Submitted" to complete the resubmission process. This is an automated email, please do not reply.
6	Final Report Modifications Submitted	Authorized Signer	Project Director	{DocumentIdentifier} / Final Report Modifications Submitted	Thank you for reviewing the areas where additional information was needed and for making changes to your final report. Your resubmission has been completed. The final report for application, {DocumentIdentifier}, has been officially resubmitted to {EventDomain}. The Affiliate will contact you if any further information is needed. {EventDomain} This is an automated email, please do not reply.
7	Final Report Modifications Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Final Report Modifications Submitted	The final report for application, {DocumentIdentifier} has been successfully resubmitted by {OrganizationName}. This project director has now reviewed all of the required modifications and made changes to the final report. This is an automated email, please do not reply.
8	Final Report Approved	Authorized Signer	Project Director	{DocumentIdentifier} / Final Report Approved	Thank you for all of your work throughout the grant cycle and for completing the final report for application, {DocumentIdentifier}. The final report for application, {DocumentIdentifier}, has been reviewed and approved. If you have any questions regarding your final report's approval, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
9	Final Report Not Approved	Authorized Signer	Project Director	{DocumentIdentifier} / Final Report Not Approved	The review of the final report submitted for application, {DocumentIdentifier} has been completed and the final report has not been approved. If you have any questions regarding the decision regarding the final report, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.

Small Grants Notifications					
Ref #	Status Name	To	CC	Subject	Notification Content
Small Grants Application					
1	Authorized Signature Required	Authorized Signer		{DocumentIdentifier}/ Authorized Signature Required	The application, {DocumentIdentifier}, has been submitted by {EventPersonNameFirstLast} for your signature. The Authorized Signer must complete the submission process prior to {DocumentDueDate} as described below to be considered for funding. Directions for submitting an application:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org . Select "My Tasks" under My Tasks. Select the name of the application in "Authorized Signature Required" status. Hover over "Forms Menu" to review the application pages. If you approve, hover over "Status Changes" and select "Application Submitted" to complete the submission process. {EventDomain} This is an automated email, please do not reply.
2	Application Submitted	Project Director	Authorized Signer	{DocumentIdentifier}/ Application Submitted	Thank you for submitting your application for review. The application, {DocumentIdentifier}, has been officially submitted to {EventDomain}. The Affiliate will continue with the review process and will contact you once a decision has been made regarding your application. {EventDomain} This is an automated email, please do not reply.
3	Application Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Application Submitted	{DocumentIdentifier} has been successfully submitted by {OrganizationName}. This application is now ready for the compliance review process. This is an automated email, please do not reply.
4	Application Modifications Required	Project Director	Authorized Signer	{DocumentIdentifier} / Application Modifications Required	The compliance review for {DocumentIdentifier} has been completed and there are areas of the application where additional information is needed before the application can continue through the review process. Please return to your application to address the requested modifications. Directions for resubmitting an application with modifications:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org . Select "Open My Tasks" under My Tasks. Select the name of the application in "Application Modifications Required" status. Hover over "Forms Menu" to review the application pages. Once the modifications have been made, hover over "Status Changes" and select "Authorized Signature Required for Modifications." If you have any questions regarding the required modifications within your application, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
5	Authorized Signature Required for Modifications	Authorized Signer		{DocumentIdentifier} / Authorized Signature Required for Modifications	The compliance review for {DocumentIdentifier} was completed and there were areas of the application where additional information was needed before the application could continue through the review process. {EventPersonNameFirstLast} has reviewed the required modifications and made the necessary changes to the application. Before the application can continue through the review process, you must return to GeMS and resubmit the application. Directions for resubmitting an application:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks. Select the name of the application In "Authorized Signature Required for Modifications" status. Hover over "Forms Menu" to review the application pages. If you approve, hover over "Status Changes" and select "Application Modifications Submitted" to complete the submission process. {EventDomain} This is an automated email, please do not reply.
6	Application Modifications Submitted	Project Director	Authorized Signer	{DocumentIdentifier} / Application Modifications Submitted	Thank you for addressing the areas where additional information was needed. The application, {DocumentIdentifier}, has been officially resubmitted to {EventDomain}. The Affiliate will continue with the review process and will contact you once a decision has been made regarding your application. {EventDomain} This is an automated email, please do not reply.
7	Application Modifications Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Application Modifications Submitted	{DocumentIdentifier} has been successfully resubmitted by {OrganizationName}. This applicant has reviewed all of the required modifications and made changes to the application. This is an automated email, please do not reply.

Small Grants Notifications					
Ref #	Status Name	To	CC	Subject	Notification Content
Small Grants Application					
8	Application Review Required	Reviewer		{DocumentIdentifier} / Application Review Required	Thank you for your commitment to {EventDomain} and agreeing to be a member of the {DocumentTemplateInstanceSubCode} community grant review panel. {DocumentIdentifier} was submitted by {OrganizationName} and is now available for review. If you believe you may have a conflict of interest with {OrganizationName} please contact {EventPersonNameFirstLast} at {EventPersonEmail} to disclose the conflict prior to reviewing the application. Directions for reviewing an application:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks.Select the name of the application which requires your review.Hover over "Forms Menu" to review the application pages.Once you have reviewed the application pages, select the "Peer Review" link under "Forms Menu."Select the "Review Panel" button on the upper right side of the screen.The review categories and scoring will be available for your input.Select "Save" to save the information inputted. Directions for printing an application:<ol style="margin-left:20px">Select the name of the application you would like to print.Hover over "Management Tools" button.Select the "Create a full print version" link. {EventDomain} This is an automated email, please do not reply.
9	Application Award Notification	Project Director	Authorized Signer	{DocumentIdentifier} / Application Award Notification	Congratulations! The grant application you submitted has been approved for funding by {EventDomain}. The grant award is contingent on your organization executing a grant agreement with Komen and we will notify you as soon as a contract is available for your review. We are excited about this grant and the work that can be achieved in our continued efforts to move closer to fulfilling the promise of Susan G. Komen - Save lives by meeting the most critical needs in our communities and investing in breakthrough research to prevent and cure breast cancer. If you have any questions regarding your application's approval for funding, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
10	Pre-Award Application Revisions Required	Project Director	Authorized Signer	{DocumentIdentifier} / Application Revisions Required	Congratulations! The grant application you submitted has been tentatively approved for funding by {EventDomain}. This grant approval is contingent upon your organization agreeing to make changes to the original submitted application. Please return to your application to address the requested revisions. Directions for resubmitting an application with revisions:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks. Select the name of the application in "Pre-Award Application Revisions Required" status. Hover over "Forms Menu" to review the application pages. Once the revisions have been made, hover over "Status Changes" and select "Authorized Signature for Pre-Award Revisions." If you have any questions regarding the necessary application revisions, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
11	Authorized Signature for Pre-Award Revisions	Authorized Signer		{DocumentIdentifier} / Authorized Signature for Pre-Award Revisions	The grant application you submitted has been tentatively approved for funding by {EventDomain}. This grant approval is contingent upon your organization agreeing to make changes to the original submitted application. {EventPersonNameFirstLast} has reviewed the required revisions and made the necessary changes to the application. Before the application can continue through the process, you must return to GeMS and resubmit the application. Directions for resubmitting an application with revisions:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org . Select "Open My Tasks" under My Tasks. Select the name of the application in "Authorized Signature for Pre-Award Revisions" status. Hover over "Forms Menu" to review the application pages. If you approve of the changes, hover over "Status Changes" and select "Pre-Award Application Revisions Submitted" to complete the submission process. If you have any questions regarding the necessary application revisions, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
12	Pre-Award Application Revisions Submitted	Project Director	Authorized Signer	{DocumentIdentifier} / Application Revisions Submitted	The application, {DocumentIdentifier}, has been officially resubmitted to {EventDomain}. The Affiliate will review the revisions and continue with the award process if approved. {EventDomain} This is an automated email, please do not reply.

Small Grants Notifications					
Ref #	Status Name	To	CC	Subject	Notification Content
Small Grants Application					
13	Pre-Award Application Revisions Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Application Revisions Submitted	{DocumentIdentifier} has been successfully resubmitted by {OrganizationName}. This applicant has reviewed all of the required revisions and made changes to the application. Please review the changes and continue with the contracting process if revisions are approved. This is an automated email, please do not reply.
14	Contract Acceptance Required	Project Director	Authorized Signer	{DocumentIdentifier} / Contract Acceptance Required	{EventDomain} has completed the grant contract for {DocumentIdentifier} and needs your organization to review and accept the grant agreement in GeMS. Once the contract has been executed and accepted by both the grantee and the Affiliate, the payment will be issued per the terms of the grant agreement. Please remember that only the authorized signer will be able to complete this task and contract acceptance in the system is legally binding. Directions for accepting the contract:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org Select "Open My Tasks" under My Tasks. Select the name of the application in "Contract Acceptance Required" status.Hover over "Forms Menu" and select the "Contract Acceptance" link.Upload your W9 and Insurance certification forms.Review the contract.Select either the "I Agree" or "I Decline" box and press "Save."Hover over "Status Changes" and select "Contract Accepted" if you agree to the contract terms.Select "Contract Modifications Requested" and complete the Contract Modifications page if you do not agree to the contract terms. Once you have completed the page and pressed save, hover over "Status Changes" and select "Contract Modifications Submitted." If you have any questions regarding contract acceptance, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
15	Contract Modifications Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Contract Modifications Submitted	{DocumentIdentifier} submitted by {OrganizationName} has requested contract modifications. Please work with your Board of Directors and local counsel to establish if the requests are acceptable. This is an automated email, please do not reply.
16	Contract Acceptance Required	Project Director	Authorized Signer	{DocumentIdentifier} / Contract Acceptance Required	{EventDomain} has uploaded a Letter of Clarification for the grant contract for {DocumentIdentifier} and needs your organization to review and accept the grant agreement in GeMS. Once the contract is accepted, the first installment of funds will be issued per the terms of the grant agreement. Please remember that only the authorized signer will be able to complete this task and contract acceptance in the system is legally binding. Directions for accepting the contract:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org Select "Open My Tasks" under My Tasks. Select the name of the application which is in "Contract Acceptance Required" status.Hover over "Forms Menu" and select the "Contract Acceptance" link.Review the Letter of Clarification.Select either the "I Agree" or "I Decline" box and press "Save."Hover over "Status Changes" and select "Contract Accepted" if you agree to the contract terms and the Letter of Clarification.Select "Contract Modifications Requested" and complete the Contract Modifications page if you do not agree to the contract terms and the Letter of Clarification. Once you have completed the page and pressed save, hover over "Status Changes" and select "Contract Modifications Submitted." If you have any questions regarding contract acceptance, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
17	Grant Awarded	Project Director	Authorized Signer	{DocumentIdentifier} / Grant Awarded	Thank you for submitting the fully executed contract. {EventDomain} is excited to partner with you throughout this grant cycle. The payment will be issued per the terms of the grant agreement. If you have any questions regarding the first payment or the remainder of the grant process, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
Small Grants Final Report					
20	Authorized Signature Required	Authorized Signer		{DocumentIdentifier} / Authorized Signature Required (Final Report)	The final report for the application, {DocumentIdentifier}, has been submitted by {EventPersonNameFirstLast} for your signature. Please remember that your submission is required prior to {DocumentDueDate}. Directions for submitting a final report:Log into GeMS, https://affiliategrants.komen.org . Select "Open My Tasks" under My Tasks. Select the name of the final report in "Authorized Signature Required for Final Report" status.Hover over "Forms Menu" to review the final report pages. If you approve, hover over "Status Changes" and select "Final Report Submitted" to complete the submission process.{EventDomain} This is an automated email, please do not reply.

Small Grants Notifications					
Ref #	Status Name	To	CC	Subject	Notification Content
Small Grants Final Report					
21	Final Report Submitted	Authorized Signer	Project Director	{DocumentIdentifier} / Final Report Submitted	Thank you for submitting your final report for review. The final report for application, {DocumentIdentifier}, has been officially submitted to {EventDomain}. The Affiliate will review the final report and will contact you if any further information is needed. {EventDomain} This is an automated email, please do not reply.
22	Final Report Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Final Report Submitted	A final report for application, {DocumentIdentifier} has been successfully submitted by {OrganizationName}. This final report is now ready for review. This is an automated email, please do not reply.
23	Final Report Modifications Required	Project Director	Authorized Signer	{DocumentIdentifier} / Final Report Modifications Required	The review of the final report submitted for application, {DocumentIdentifier} has been completed and there are areas where additional information is needed. Please return to your final report to make the required modifications. Directions for resubmitting a final report with modifications:<ol style="margin-left:20px">Log into GeMS, https://affiliategrants.komen.org . Select "Open My Tasks" under My Tasks. Select the name of the final report in "Final Report Modifications Required" status. Hover over "Forms Menu" to review the progress report pages. Once the modifications have been made, hover over "Status Changes" and select "Authorized Signature Required for Modifications." If you have any questions regarding the required modification within your application, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
24	Authorized Signature Required for Modifications	Authorized Signer		{DocumentIdentifier} / Authorized Signature Required for Final Report Modifications	The review of the final report submitted for application, {DocumentIdentifier} was completed and there were areas where additional information was needed. {EventPersonNameFirstLast} has reviewed the required modifications and made the necessary changes. You must return to GeMS and resubmit your final report. Directions for resubmitting a final report:Log into GeMS, https://affiliategrants.komen.org .Select "Open My Tasks" under My Tasks. Select the name of the final report in "Authorized Signature Required for Modifications" status. Hover over "Forms Menu" to review the final report pages.Hover over "Status Changes" and select "Final Report Modifications Submitted" to complete the resubmission process.{EventDomain} This is an automated email, please do not reply.
25	Final Report Modifications Submitted	Authorized Signer	Project Director	{DocumentIdentifier} / Final Report Modifications Submitted	Thank you for reviewing the areas where additional information was needed and for making changes to your final report. The final report for application, {DocumentIdentifier}, has been officially resubmitted to {EventDomain}. The Affiliate will contact you if any further information is needed. {EventDomain} This is an automated email, please do not reply.
26	Final Report Modifications Submitted	Affiliate Grants Admin		{DocumentIdentifier} / Final Report Modifications Submitted	The final report for application, {DocumentIdentifier} has been successfully resubmitted by {OrganizationName}. This project director has now reviewed all of the required modifications and made changes to the final report. This is an automated email, please do not reply.
27	Final Report Approved	Authorized Signer	Project Director	{DocumentIdentifier} / Final Report Approved	Thank you for all of your work on your grant funded project and for completing the final report for application, {DocumentIdentifier}. The final report for application, {DocumentIdentifier}, has been reviewed and approved. If you have any questions regarding your final report's approval, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.

GeMS Notifications					
Ref #	Status Name	To	CC	Subject	Notification Content
GeMS Registration					
1	Registration Submitted	New Registrant		{EventDomain} / Grants eManagement System Registration	Your registration for the Grants eManagement system for {EventDomain} has been submitted for approval. You will receive an email once your registration has been approved and at that time you will be able to access the Grants eManagement system. If you have any questions regarding your registration, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
2	Registration Submitted for Approval	Affiliate Grants Admin or Project Director		{PersonName} / Grants eManagement System Registration	{PersonName} has registered. Please login to GeMS and approve this user. Once you have approved this user, they will have the ability to login and utilize GeMS. This is an automated email, please do not reply.
3	Registration Approved	New Registrant		{EventDomain} / Grants eManagement System Registration Approved	Congratulations you have been approved as a {EventDomain} Grant eManagement System, GeMS, user. You can now login and utilize GeMS. If you have any questions regarding GeMS, please contact {EventPersonNameFirstLast} at {EventPersonEmail}. {EventDomain} This is an automated email, please do not reply.
4	Organization Person Validation	Project Director, Authorized Signer, Affiliate Grants Admin		{PersonName} has been added to {OrganizationIdentifier}.	{PersonName} has been added to {OrganizationIdentifier} he/she will be active from {OrganizationPersonActivationDate} and his/her role is {OrganizationPersonRole}.
Conflict of Interest Verification					
1	COI Verification Required Creation	COI Approver		{DocumentIdentifier} / COI Verification Required	{EventPersonNameFirstLast} has completed the conflict of interest declaration form. Please log into GeMS, https://affiliategrant.komen.org , and verify the declared conflicts of interest. If you have any questions regarding the disclosed conflicts please contact {EventPersonNameFirstLast} at {EventPersonEmail}. This is an automated email, please do not reply.