



eGMS Grantee User Guide

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National Endowment for the Humanities



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Introduction

eGMS has been designed to make it easier to submit and manage reports, respond to award offers, report on grant outcomes, and communicate with the National Endowment for the Humanities (NEH). This user guide will introduce you to the different areas of eGMS and provide instructions for using these areas easily and effectively.

NEH accepts all financial and performance reports via eGMS. Reports will be accepted for existing grants as well as new grants. Official correspondence will use the eGMS messaging area.

At this time, payment requests are not accepted by eGMS.

Getting Started

System Requirements

To use eGMS, you must have a computer with an internet connection, a web browser to view web pages on the internet, Adobe Acrobat Reader software to view submitted reports, and a way to convert your performance reports to PDF format. The Adobe Acrobat Reader software is available for free online at <http://get.adobe.com/reader/otherversions/>. If you do not have a way to save your documents in PDF format, please consult our guide to free or low-cost converters at <http://www.neh.gov/grants/grantsgov/pdf.html>.

Access to eGMS

To begin, open a web browser such as Microsoft's Internet Explorer or Mozilla Firefox and go to the following URL:

<https://securegrants.neh.gov/eGMS/>

You will now see the Login area.

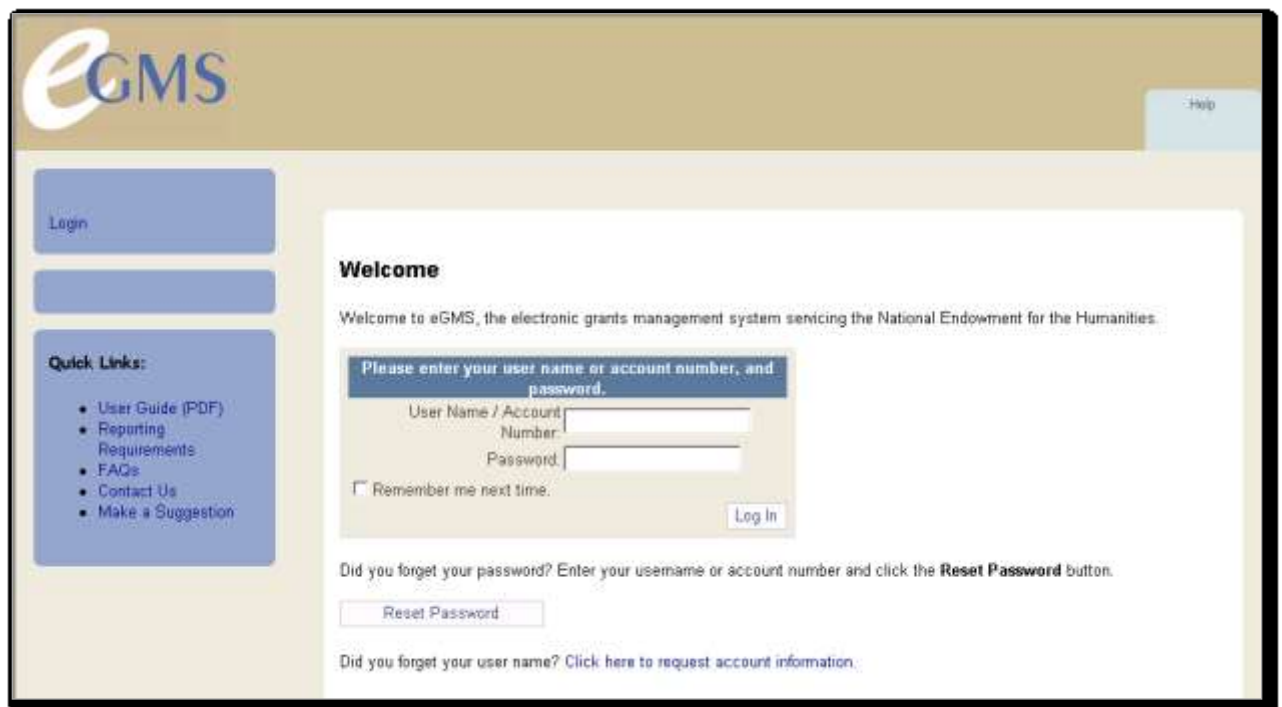


Figure 1: eGMS Login

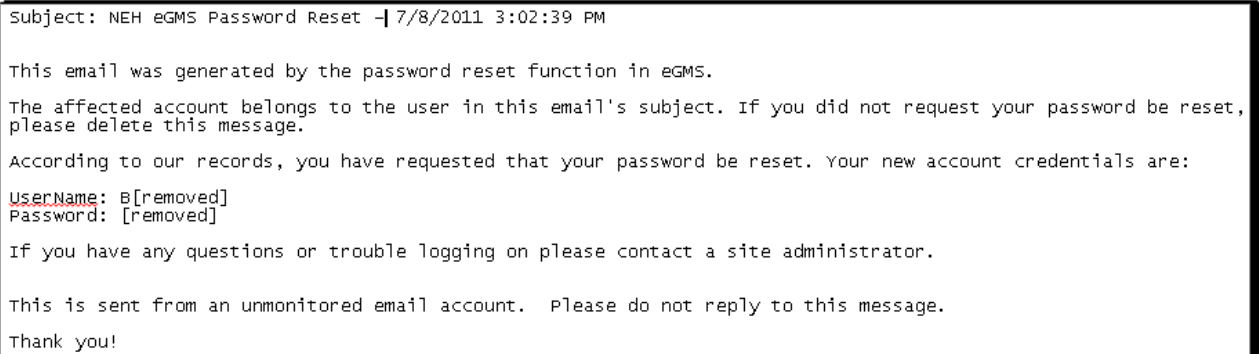
To login, you must first know your account number or user name. This information is provided in the Notice of Action you received with your grant award documents or within

your Offer letter¹. If you do not know your account number or user name, click the **Click here to request account information** hyperlink at the bottom of the login page. You will be prompted to enter your email address. If the email address matches an eGMS account, information regarding the account will be sent to that email address.

Note: User names were introduced to eGMS in July 2011. If you do not have a user name but you do have an account number, you will be prompted to select a user name when you log in.

Selecting a Password

If you are accessing eGMS for the first time, enter the account number or user name you were provided and click the **Reset Password** button. An e-mail message will be sent to you with a temporary password.



The image shows a screenshot of an email message with a black border. The text inside the email reads: 'Subject: NEH eGMS Password Reset -| 7/8/2011 3:02:39 PM', 'This email was generated by the password reset function in eGMS.', 'The affected account belongs to the user in this email's subject. If you did not request your password be reset, please delete this message.', 'According to our records, you have requested that your password be reset. Your new account credentials are:', 'UserName: B[removed]', 'Password: [removed]', 'If you have any questions or trouble logging on please contact a site administrator.', 'This is sent from an unmonitored email account. Please do not reply to this message.', and 'Thank you!'.

Figure 2: Reset Password E-mail Message

Return to the eGMS login page and enter the provided user name and password. You will next be prompted to reset your password. If you have never accessed eGMS before, you will also create a security question to help retrieve your password in the future. Please note that passwords must contain between 8 and 16 non-whitespace characters, 1 number, 1 uppercase character, 1 lowercase character, and 1 symbol.

¹ Offer letters include account information beginning in March 2012.

Home > Reset Password

You must change your password to continue using eGMS!

Change Your Password

Password:

New Password:

Confirm New Password:

Security Question: *If you forget your password you will be asked the security question you choose here and prompted to enter the answer you specify below.*

Security Answer:

Passwords must contain between 8 and 16 non-whitespace characters, 1 numeric, 1 uppercase character, 1 lowercase character, and 1 symbol.

Figure 3: Password Reset

Main Menu

After you log in to eGMS, you will see the main menu, which lists the grants to which you have access.

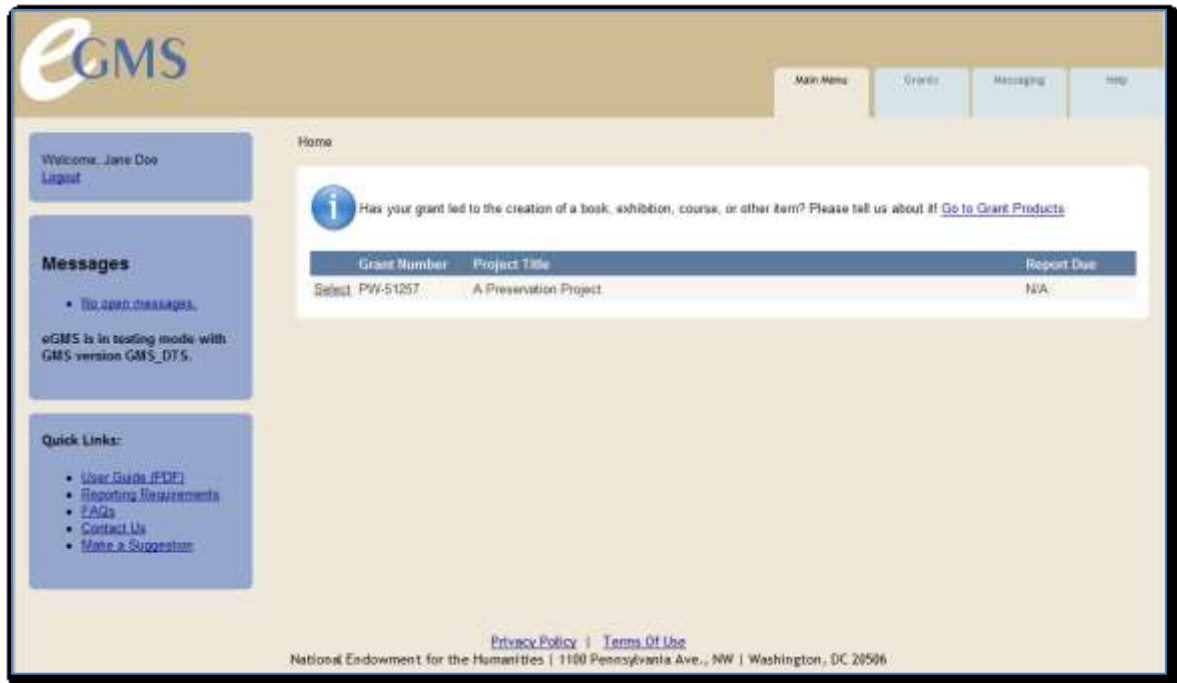


Figure 4: eGMS Main Menu

The left-hand side of the eGMS web site contains important links, system notices, messages to you, and a list of reports that may be due soon or delinquent. At the upper right-hand corner of the web site, navigational tabs take you to the four main sections: **Main Menu, Grants, Messaging, and Help.**

After selecting a grant, you will be able to perform up to three functions. First, you may view, accept, negotiate, or decline an offer sent to you by NEH. Second, you may view and submit post-award reports for your grant. Finally, you may tell us about the results of your grant in the Products and Coverage area.

Accepting or Rejecting an Offer

NEH may send to you an offer letter after your grant has been approved for funding. After logging into eGMS, you will see an offer alert at the top of the page. You can access the offer by clicking on the alert link.



The screenshot shows the eGMS Home page. At the top left is the eGMS logo. To the right are navigation tabs for Main Menu, Grants, Messaging, and Help. On the left side, there are three blue boxes: a Welcome message for Jane Doe with a Logout link, a Messages section with a link to view open messages and a note about testing mode, and a Quick Links section with links for User Guide (PDF), Reporting Requirements, FAQs, Contact Us, and Make a Suggestion. The main content area is titled 'Home' and features a yellow warning icon with a message: 'Congratulations! You have received an offer for PW-51257. [Click here](#) to view the offer letter and details.' Below this is an information icon with a message: 'Has your grant led to the creation of a book, exhibition, course, or other item? Please tell us about it! [Go to Grant Products](#)'. A table below displays grant information:

Grant Number	Project Title	Report Due
Selected: PW-51257	A Presentation Project	N/A

At the bottom, there are links for Privacy Policy and Terms Of Use, and the footer text: 'National Endowment for the Humanities | 1100 Pennsylvania Ave., NW | Washington, DC 20506'.

Figure 5: Offer Alert

You will be directed to the offer page where you can view the offer letter along with other related documents, upload documents requested by NEH, and accept or decline the offer.

Any messages you receive during the offer process are also available in the Messaging area.

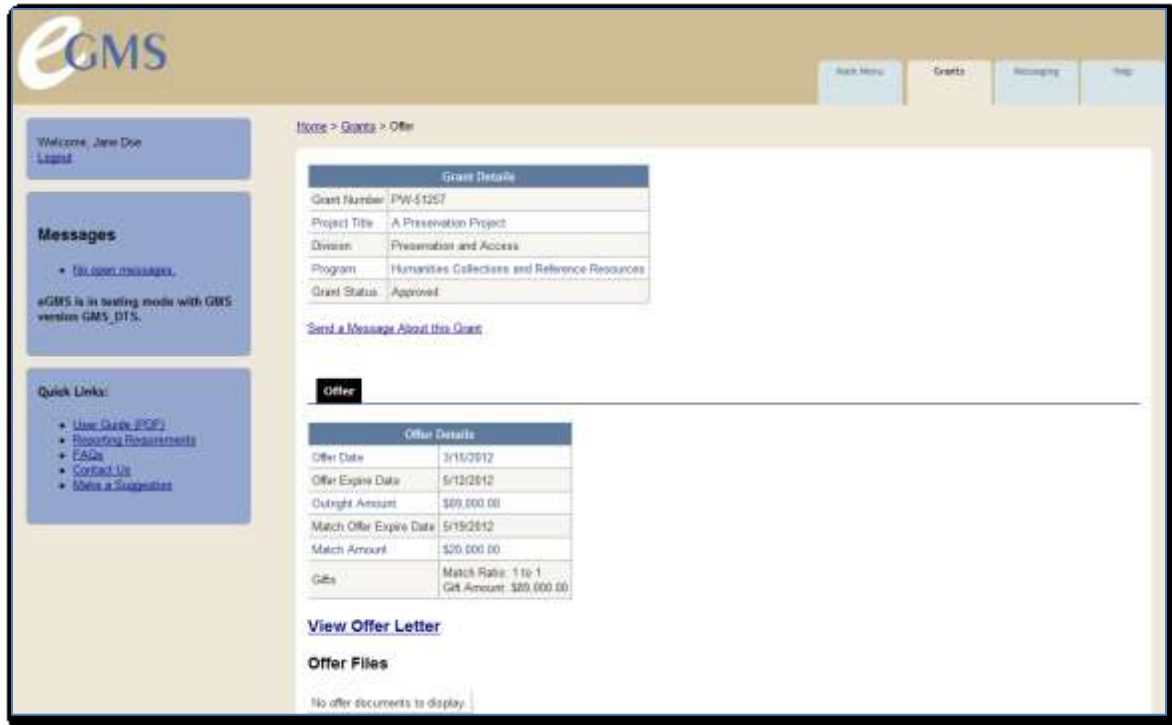


Figure 6: Viewing an Offer

Important Note

If your grant is awarded to an organization, only the institutional grant administrator can accept or reject an offer. The **Accept** and **Reject** buttons will be disabled if you do not have the necessary permissions.

Accepting an Offer

NEH staff may require that you provide certain documents before completing the offer acceptance process. You may upload these documents before or after accepting the offer.

Uploading Offer Documents

To upload a file, click the **Select File** button and select the document from your computer. Click **Continue** to complete the uploading process (see Figure 8). The Offer page will refresh and you will see the uploaded document in the list of Offer Files. When you upload a document, eGMS will notify NEH staff of your uploaded document so it may be reviewed.

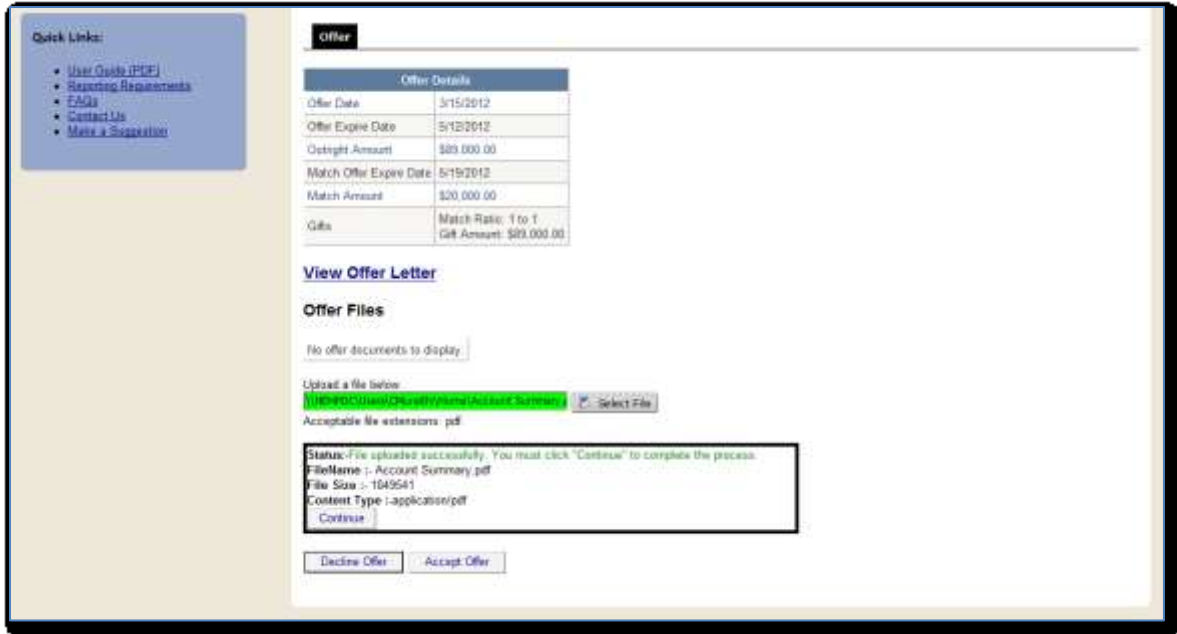


Figure 7: Uploading Offer Documents

Important Note

You can only upload PDF files. Convert your files to PDF prior to uploading them.

Accepting the Offer

To accept the offer, click the Accept button. You will be asked to confirm that you want to accept the offer. Click **OK**.

Declining an Offer

To decline an offer, click the **Decline** button. Enter your reason and click **Save** (see Figure 7). Note that the grant will no longer be listed on your list of grants after you log out.

Quick Links:

- [User Guide \(PDF\)](#)
- [Reporting Requirements](#)
- [FAQs](#)
- [Contact Us](#)
- [Make a Suggestion](#)

Offer

Offer Details	
Offer Date	3/15/2012
Offer Expires Date	5/12/2012
Outright Amount	\$89,000.00
Match Offer Expires Date	5/19/2012
Match Amount	\$20,000.00
Gifts	Match Rate: 1 to 1 Gift Amount: \$89,000.00

[View Offer Letter](#)

Offer Files

No offer documents to display.

Upload a file below:

Acceptable file extensions: pdf

Decline Reason

Figure 8: Declining an Offer

Submitting a Grant Report

To submit a report, first select the appropriate grant number by clicking it from the main menu. You will now see a list of the reports on schedule for your grant. Every report is assigned an identification number for reference purposes called a Report ID. You will also see the type of report and its due date. If you have never submitted a particular report, click the **Submit** link. If you have submitted a report in the past you may view it by clicking **View** or submit a revision by clicking **Resubmit**.

The screenshot shows the eGMS web application interface. The top navigation bar includes 'Home', 'Grants', 'Reports', 'Messages', and 'Help'. The main content area is titled 'Home > Grants > Reports'. On the left, there is a sidebar with 'Welcome, Jane Doe', 'Messages', and 'Quick Links'. The main content area features a 'Grant Details' table, a 'Send a Message About this Grant' link, and a 'Grant Reports' table. The 'Grant Reports' table has a 'Submit' link next to the first row.

Grant Details				
Grant Number	PW-51257-12			
Project Title	A Preservation Project			
Division	Preservation and Access			
Program	Humanities Collections and Reference Resources			
Grant Status	Awarded			

[Send a Message About this Grant](#)

Reports | Products and Coverage | Offer

Grant Reports

[Additional Federal Matching Report](#)

Report ID	Report Type	Due Date	Status
105720	Final Financial	9/30/2014	Not Submitted
Submit 105721	Final Performance	9/30/2014	Not Submitted

[Privacy Policy](#) | [Terms Of Use](#)
National Endowment for the Humanities | 1100 Pennsylvania Ave., NW | Washington, DC 20506

Figure 9: Reports by Grant

Important Note

If you do not see a submit button to the left of a report, you do not have permission to submit that kind of report. In general, for grants made to institutions, only the grant administrator may submit financial reports. If you have questions regarding your eGMS permissions, please click the **Contact Us** link to send your request to the right person.

Financial Reports

Web Form Submissions

The Federal Matching, Final Financial, Challenge Financial, and Gift Certification reports may be completed online using forms that handle calculations for you. Follow the form instructions and consult the provided additional guidelines while completing these forms.

Some forms provide the option to attach additional documentation, as seen below in the Federal Matching Funds report. Additional documentation may be uploaded by clicking the **Browse** button, selecting the file from your computer's file system, and then checking the "Documentation Attached" checkbox. Please note that files must be in PDF format to be accepted.

Federal Matching Funds

Grantee Organization: _____

In the table below, enter gifts received to match NEH Grant _____ (Has Matching Component). [Click here for Instructions \(NEH website\).](#)

Donor Category	Number of Donors	Amount
Individuals	<input type="text"/>	\$ <input type="text"/>
Corporations or Businesses	<input type="text"/>	\$ <input type="text"/>
Public/Private Foundations	<input type="text"/>	\$ <input type="text"/>
Labor Unions, Associations	<input type="text"/>	\$ <input type="text"/>
Nonfederal Government Units	<input type="text"/>	\$ <input type="text"/>
Affiliated Groups	<input type="text"/>	\$ <input type="text"/>
Special Events, Benefits	<input type="text"/>	\$ <input type="text"/>
Other	<input type="text"/>	\$ <input type="text"/>
Total		\$ <input type="text"/>

Are you certifying any pledges by submitting this form?

The amount certified with this form includes \$ in pledges. By submitting this form I certify that (1) the pledge is legally enforceable, (2) the donor is obligated to pay the pledge during the grant period, and (3) the immediate release of matching funds is necessary to carry out project activities.

If you are certifying any pledges, indicate by checking the box below and uploading a file containing the pledge letter(s) received from the donor(s). Uploaded files must be in Adobe PDF format.

Documentation attached

Institutional Grant Administrator _____


Figure 10: Federal Matching Funds Report

Upon submitting the form, be sure to read the certification language before clicking the **Submit Form** button. Clicking the **Submit Form** button sends your report to NEH with your electronic signature. The form is converted to PDF format so that it may be viewed from the Grant Reports main menu. You may also save a copy of the report.

Financial reports are always retained by NEH, so resubmitting will not replace an existing report. Instead, when you view the reports for a particular grant, you will see multiple financial reports listed.

Alternative Submission Option

If you have already completed a financial report by different means, such as using a fillable PDF form, you may submit this version using the upload tool at the top of the financial report web form.



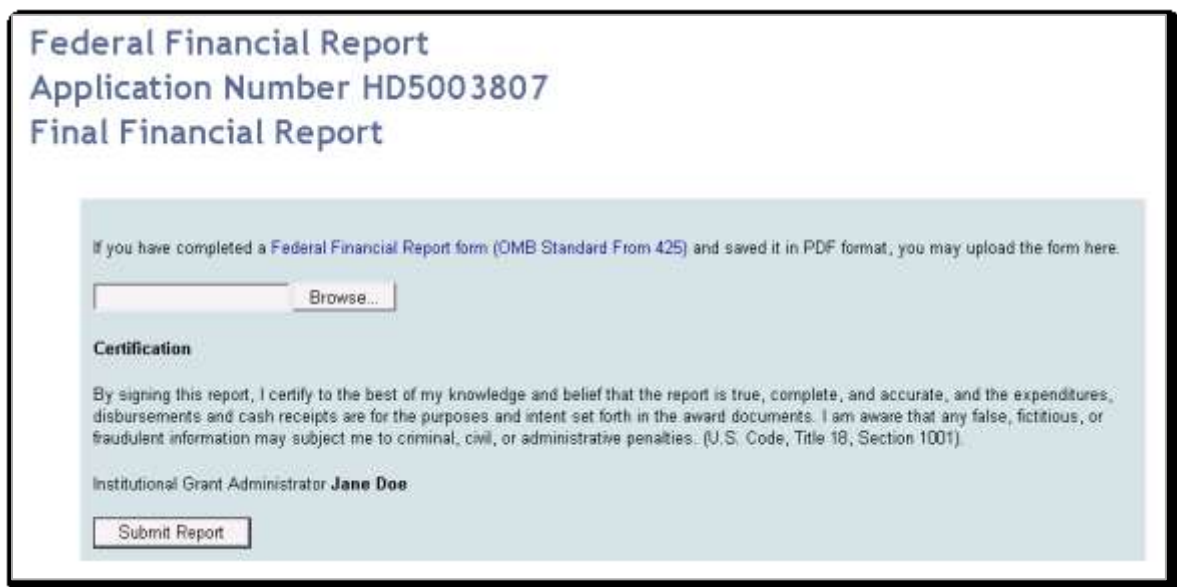
Federal Financial Report
Application Number HD5003807
Final Financial Report

Alternative Submission Option: You may also upload an existing Federal Financial Report (OMB Standard Form 425).

Upload a Report

Figure 11: Alternative Financial Report Submission

Click the **Upload a Report** button.



Federal Financial Report
Application Number HD5003807
Final Financial Report

If you have completed a Federal Financial Report form (OMB Standard Form 425) and saved it in PDF format, you may upload the form here.

Browse...

Certification

By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and intent set forth in the award documents. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

Institutional Grant Administrator **Jane Doe**

Submit Report

Figure 12: Uploading a Financial Report

Next, click the **Browse** button, locate the file in your file system, and click the **Submit Report** button. Please note that your file must be in PDF format.

Performance Reports

Performance reports are submitted by simply uploading PDF-formatted files using the form illustrated below.

A screenshot of a web form titled "Final Performance Report". The breadcrumb navigation at the top reads "Home > Grant Reports > Performance Report". Below the title, there is a text instruction: "Upload your report below. The report must be in PDF format." Underneath this instruction is a file input field with a "Browse..." button to its right. Below the input field is an "Upload Report" button.

Figure 13: Performance Reports

Some kinds of performance reports require following particular instructions that will be displayed on the Performance Report web page.

Important Note

Resubmitting a performance report will replace the existing performance report on file at NEH.

Submitting Grant Products and Coverage

Grant Products

Has your NEH grant resulted in the creation of some kind of product? Products may include a journal article, book, conference presentation, exhibition, film, or even a faculty position. You may use eGMS to tell NEH about the results of your grant even years after your grant has ended, and the information will be available on the NEH web site when members of the public search for information about NEH grants.²

To provide product information, click on the desired grant on the main menu and click the **Products and Coverage** tab.

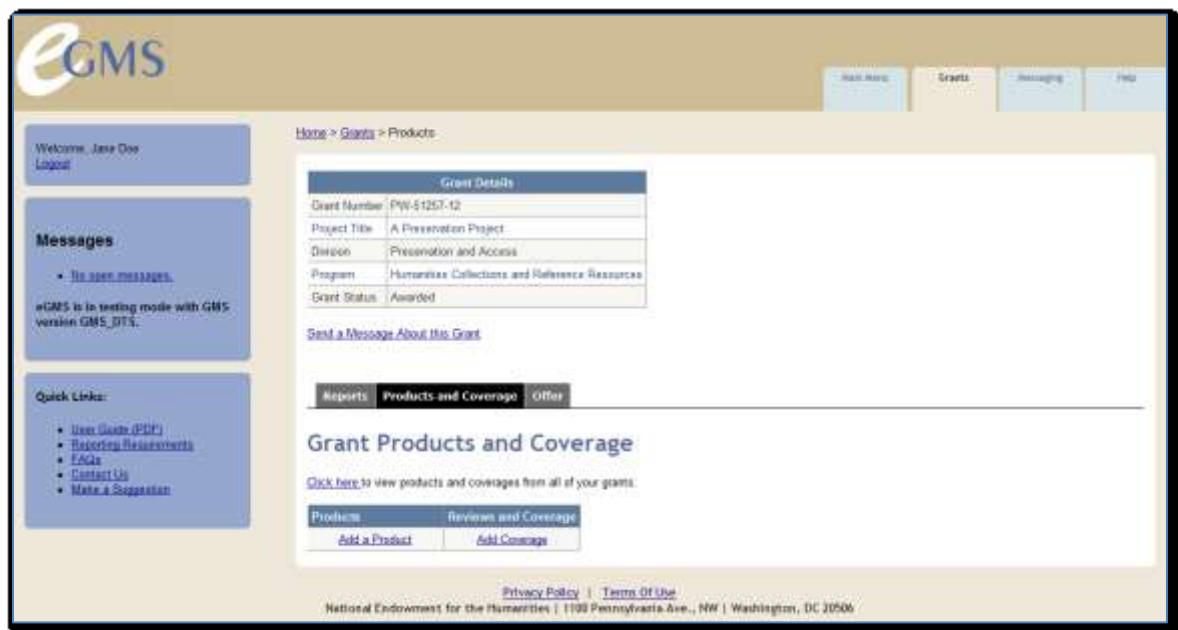


Figure 14: Grant Products and Coverage Main Menu

You will see links to add product and coverage information for your grant. If you have supplied information in the past, you will also be able to modify the existing information. You may view product and coverage information for all of the grants to which you have access by clicking the link directly below the Grant Products and Coverage heading.

Add a Product

To add a new product, click the **Add a Product** link. Next, select the type of product.

² Grant product data submitted via eGMS are subject to review by NEH staff members prior to release on the NEH web site. This review period will extend for 60 days after submission or revision.

Home > Products & Coverage > Add/Edit Product

Add a Grant Product

Product type -- Select a product type from the list --

- Select a product type from the list --
- Acquisitions/Materials Collection
- Article
- Blog Post
- Book
- Book Section
- Buildings
- Catalog
- Center
- Computer Program
- Conference Paper/Presentation
- Conference/Institute/Seminar
- Course or Curricular Materials
- Database/Archive/Digital Edition
- Exhibition
- Film/TV/Video Broadcast or Recording
- Game/Simulation
- Grant
- Public Lecture or Presentation
- Radio/Audio Broadcast or Recording
- Report
- Script
- Staff/Faculty/Fellow Position
- Web Resources

Looking for help?
 Hover over the field names for a description of the field and tips.

OMB No. 3136-0134
Expires: 6/30/2012

NEH estimates that the instructions for this estimated completion time. Office of Publication Paperwork Reduction Act of 1995, no persons are required to respond to this information collection if it does not display a valid OMB control number.


per response. This estimate includes the time for reviewing the data on the form. Please send any comments regarding suggestions for reducing completion time, to the Director, Office of Management and Budget, Paperwork Reduction Project (3136-0134), Washington, D.C. 20506; and to the Office of Management and Budget, Paperwork Reduction Project (3136-0134), Washington, D.C. 20506; and to the Office of Management and Budget, Paperwork Reduction Project (3136-0134), Washington, D.C. 20506.

Figure 15: Add a Product

After selecting the type of product, complete the supplied form. Additional help for the form is available by hovering over a field name.

Home > Products & Coverage > Add/Edit Product

Add a Grant Product

 Looking for help?
 Hover over the field names for a description of the field and tips.

Product type

Article in a scholarly journal or other periodical. Could be printed or digital.

Title

Author [\[Add another Author \]](#)

Jane Doe

Abstract

Year

Product User

Enter the year when the product was created.

Figure 16: Adding a Grant Product

Some form fields support multiple entries. For example, the form in figure 12 supports entry of multiple authors. Enter an author's name and then click the **[Add another Author]** link. Your existing item will appear below the entry area and you will be able to add an additional name.

Once you have completed the form, click the **Add Grant Product** button.

Adding a Prize to a New Product

If a product has received a prize, after adding the product, click the **[Add a Prize]** link. (If the product has not received a prize, click **Save Changes** to return to the main menu.)

Home > Products & Coverage > Add/Edit Product

Add a Grant Product

Prizes

Has this grant product received any awards or prizes?

[Add a Prize]

Save Changes


 Looking for help?
 Hover over the field names for a description of the field and tips.


Figure 17: Adding a Prize

Complete the provided form to provide information about the prize, and then click the **Add Prize** button.

Add a Grant Product

Prizes

Has this grant product received any awards or prizes?

 Looking for help?
 Hover over the field names for a description of the field and tips.

Prize Awarded for Product:

Name of Prize

Awarding Organization

Awarding Organization's Website (URL)

Date Awarded

Description/Abstract

Prize Website (URL)

Figure 18: Entering prize information

After clicking the **Add Prize** button, click the **Save Changes** button to return to the main menu. You will also be able to add additional prizes by clicking the **Add Prize** button again or editing the product.

Edit a Product

Once a product has been entered, it may be edited by clicking the **[Edit]** link.

Important Note:

You will be able to edit products for grants that may have been entered by other people who also have access to the grants using eGMS. For example, a project with multiple project directors will allow both individuals to view and edit the same set of products.

Award-winning products will be displayed with a trophy.



The screenshot shows a web interface titled "Grant Products and Coverage". At the top, there is a breadcrumb "Home > Products & Coverage". Below the title is a table with three columns: "Grant", "Products", and "Reviews and Coverage".

Grant	Products	Reviews and Coverage
HD-50038-07: A Test Application	<ul style="list-style-type: none">Article: An Article in a Scholarly Journal [Edit] 🏆 <p>Add a Product</p>	Add Coverage

Figure 19: Editing a Product

Once the **[Edit]** button has been clicked, you may revise the product information and add, edit, or delete prizes.

Coverage

Has your grant been reviewed or received media coverage? If so, please tell us about it. You may use eGMS to tell NEH about coverage of your grant even years after your grant has ended, and the information will be available on the NEH web site when members of the public search for information about NEH grants.³

To provide coverage information, select a grant from the main menu and then select the Products and Coverage tab (see Figure 14).

Add Coverage

To add coverage, click the **Add Coverage** link next to the grant in the Grant Products and Coverage main menu. Complete the provided form and click the **Add Coverage** button when finished.

Edit Coverage

To revise information about coverage of your grant, click the **[Edit]** link next to the item in the Grant Products and Coverage main menu.

³ Grant coverage data submitted via eGMS are subject to review by NEH staff members prior to release on the NEH web site. This review period will extend for 60 days after submission or revision.

Communicating with NEH using eGMS

Sending messages to NEH regarding your grants and reports has never been easier—or so easy to manage. To send a message to NEH, click the **Send a Message About this Grant** link on the grant main menu and complete the provided form. When a NEH staff member replies to your message, you will receive a notification by e-mail that a new message has been sent to you.

eGMS provides a **Messaging** area with options to view messages regarding a particular grant.



The screenshot displays the eGMS Messaging interface. At the top left is the eGMS logo. A navigation bar includes links for Home Menu, Grants, Messaging, and Help. The main content area is titled "eGMS Correspondence" and "Messages". On the left sidebar, there is a welcome message for Jane Doe, a "Logout" link, a "Messages" section indicating 4 open messages and a testing mode notice, and a "Quick Links" section with links to User Guide (PDF), Reporting Requirements, FAQs, Contact Us, and Make a Suggestion. The main area contains a table of messages.

	Message Type	Subject	Created By	Date Created	Current Status	Replies
View	Grant Management Question	Grant Management Question - Jane Doe	Jane Doe (269001)	3/15/2012 10:11:30 AM	Open	0
View	Account Management	Forgot Password	Christopher Murethi (cmurethi)	3/15/2012 4:38:49 PM	Open	0
View	Account Management	Account Management - Jane Doe	Jane Doe (269001)	3/15/2012 4:37:07 PM	Open	0
View	Account Management	Grant Correspondence (PW51257)	Christopher Murethi (cmurethi)	3/15/2012 4:36:13 PM	Open	0
View	Offer Correspondence	Offer for grant PW-51257 has been accepted.	John Smith (269002)	3/15/2012 3:47:04 PM	Closed	0
	Offer	File uploaded for grant PW	John Smith	3/15/2012		

Figure 20: eGMS Messaging

Messages may also be generated by using the **Help** section of eGMS.

Using Help

The Help section of eGMS provides the latest grant reporting requirements, answers to frequently asked questions, and our privacy policy. A form is provided for contacting NEH grant management or technical staff. In addition, a tool is provided for changing your account password.