Using GMIS as an Applicant

Disaster Cycle Services

Long-Term Recovery

February 2019

American Red Cross

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Change Log

Date	Version Number	Change
September, 2018	V.1.0 2018.09.xx	• Initial Posting

Audience & Purpose

This guidance is intended for organizations who wish to submit a grant application through GMIS, the Grant Management Information System for the American Red Cross.

Document Scope

An organization uses GMIS in two broad phases:

- During the grant application process; and
- (if awarded a grant) For scheduled reporting and, if needed, to execute a grant amendment.

This document covers how to use GMIS in both phases, as well as how to establish a user account that provides system access.

Technical Specifications

The best internet browsers for using GMIS are Chrome and Firefox. Do not use Internet Explorer, as GMIS does not work well with it.

Additional Support

If you encounter difficulties when using GMIS, and the information in this document does not allow you to resolve them, please contact gmis.help@redcross.org.

A Note regarding White Space in This Document

In order to help Grantees orient themselves in the system, this document features a high number of screen shots, some of which are large. As a result, some pages feature a fair amount of white space at the bottom. Filling that white space would often mean shrinking a subsequent screen shot, which we were not eager to do. When you encounter a partially full page, please continue to the next page, as it may feature a helpful screen shot and/or additional information.

Establishing a GMIS Account

Overview

Performing grant-related tasks in GMIS requires you to first establish an account in the system on behalf of your organization. All Grantee accounts are associated with an organization, and when establishing an initial account for your organization, you create an organization record as part of the registration process, including establishing a primary point of contact. Then, when completing a grant application, you can designate additional team members who can also log into GMIS to support the grant application process. If you need to add an application team member after submitting your grant application, contact your Grants Manager.

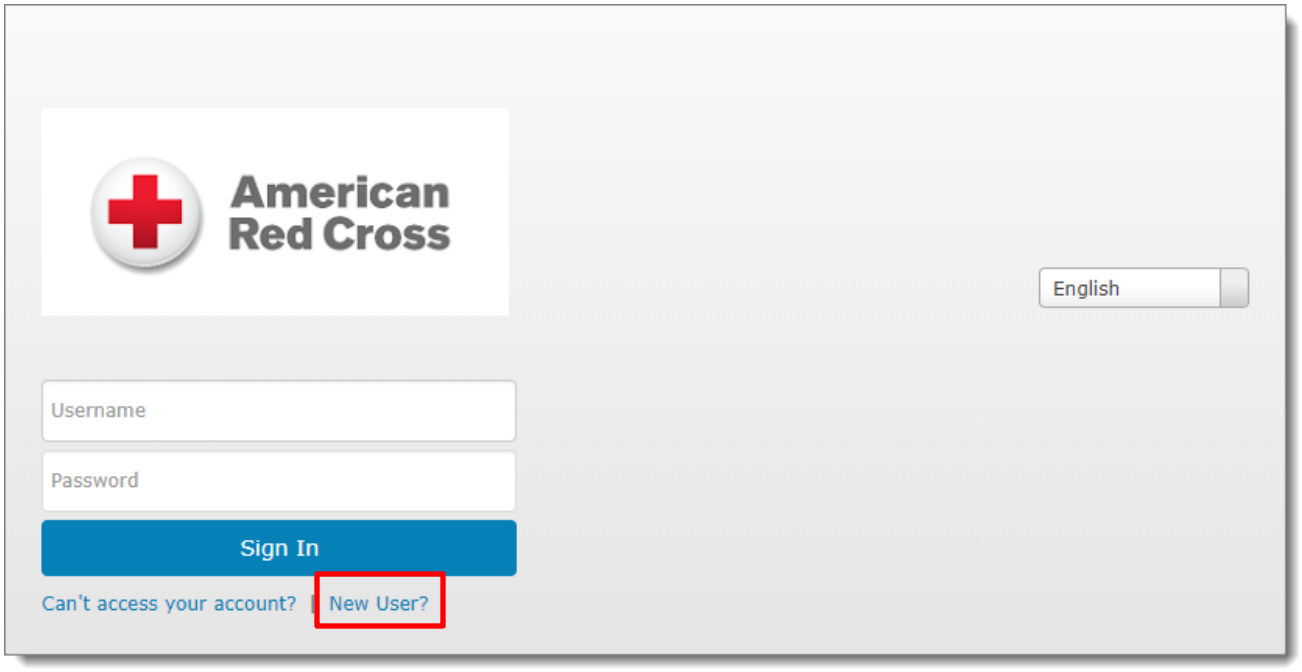
Note that the process of establishing a GMIS account requires you to identify an email address, where you receive an automated verification message with a link that you must click to complete the process of establishing your account.

Summary of Steps

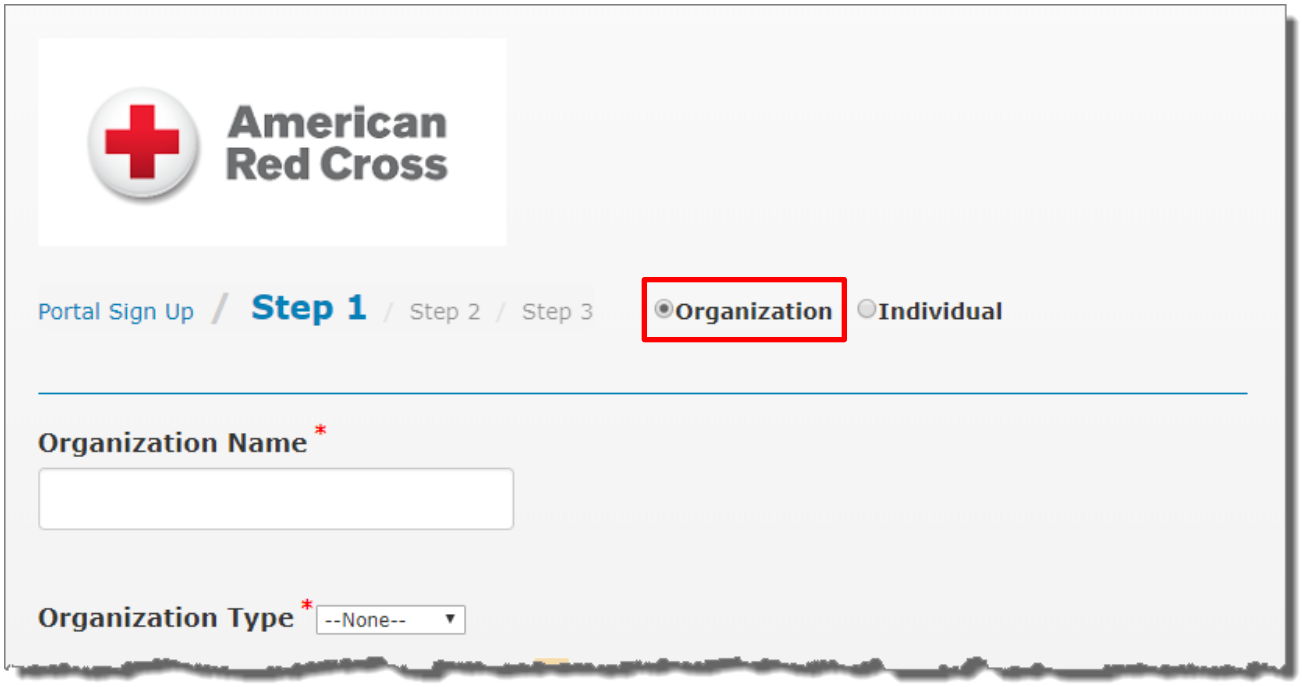
- Navigate to https://gmis.force.com/ and click *New User?* (GMIS displays the *Portal Sign Up* form.)
- At the top of the *Portal Sign Up* form, leave the default *Organization* value selected.
- Complete each page of the *Portal Sign Up* form, clicking *Next* to move to the next page. (Required fields are marked with a red asterisk.)
- At the last page, click *Register* to submit your new account information. (GMIS sends an automated email to the email address you entered on the form.)
- Open the email (it is from *GMIS Applicant Portal Site Guest User* and may be in your *Spam*, *Junk*, or *Clutter* folder) and click the link to confirm your email address. (GMIS displays a message indicating that your email address has been confirmed; it features an *Activate* button. Note: If the link is not active, or if clicking it takes you to Internet Explorer, copy and paste it into Chrome or Firefox.)
- Click *Activate*. (GMIS replaces the *Activate* button with a *Go to Login Page* button.)
- (if desired) Click *Go to Login Page* to return to https://gmis.force.com/ and log into GMIS.

Detailed Steps

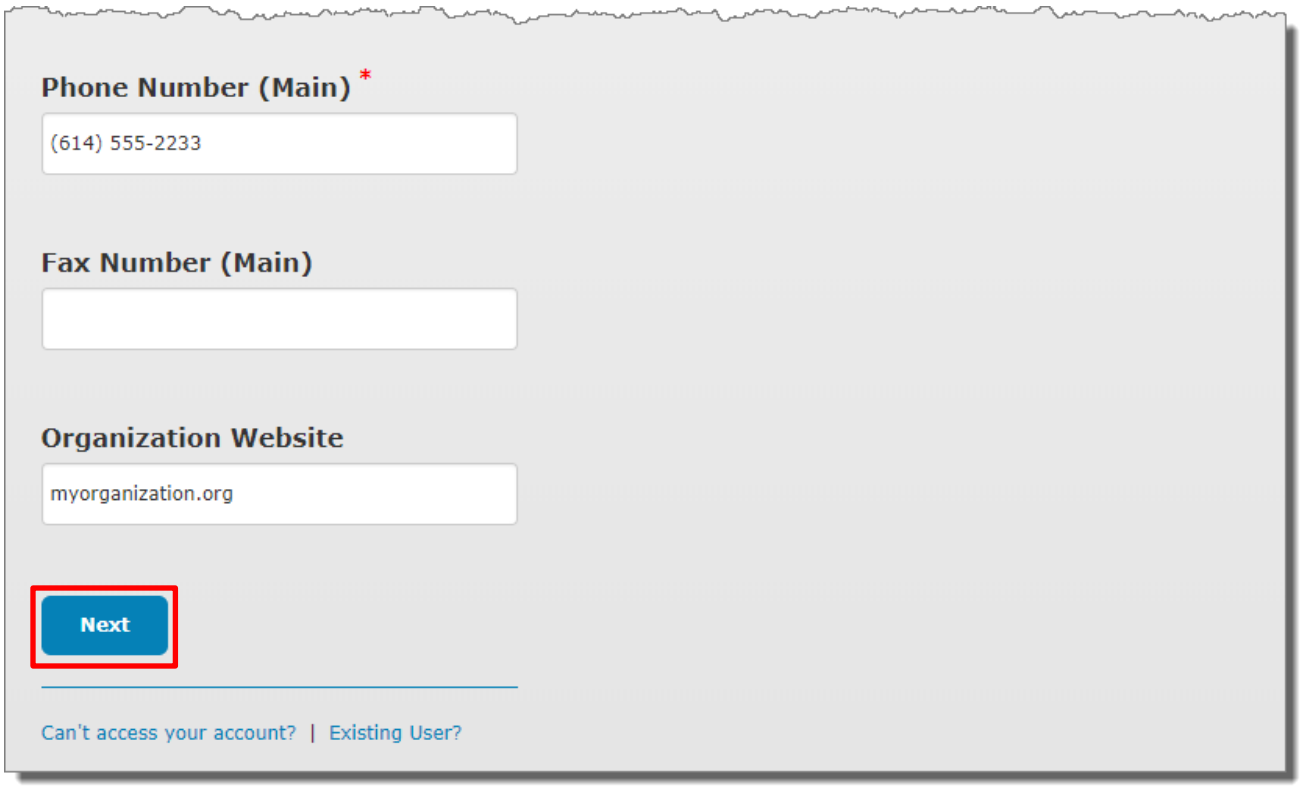
- Navigate to https://gmis.force.com/.
  - It is a good idea to make GMIS a favorite (or bookmark) at your browser.
- Click *New User?* (GMIS displays the *Portal Sign Up* screen.)



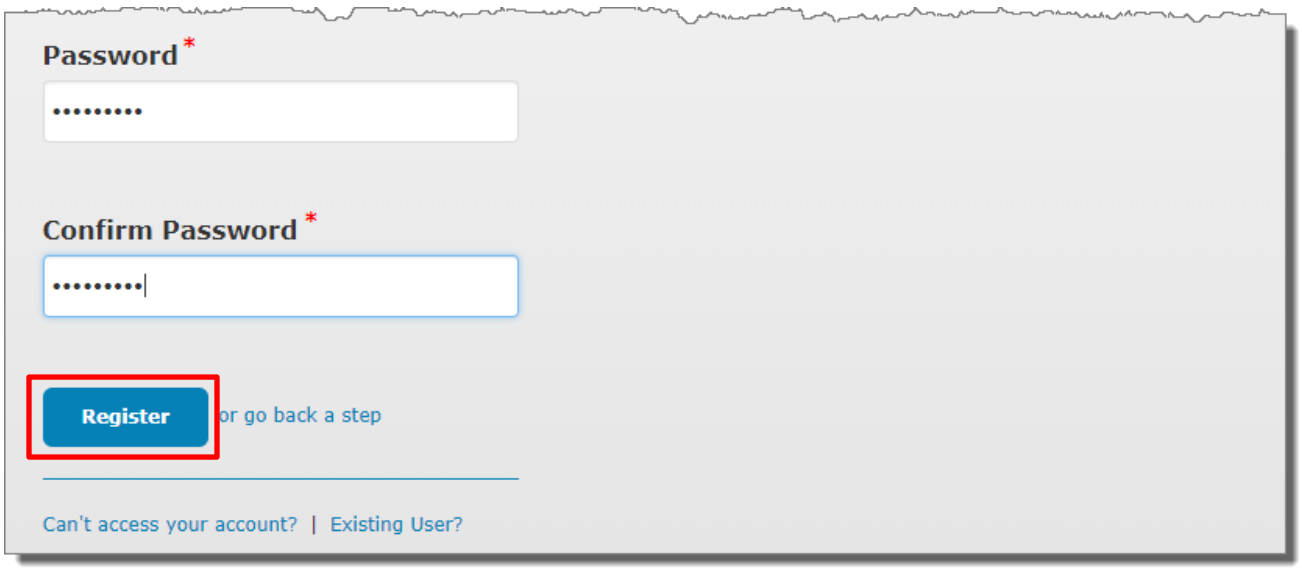
- At the top of the *Portal Sign Up* form, leave the default *Organization* value selected.



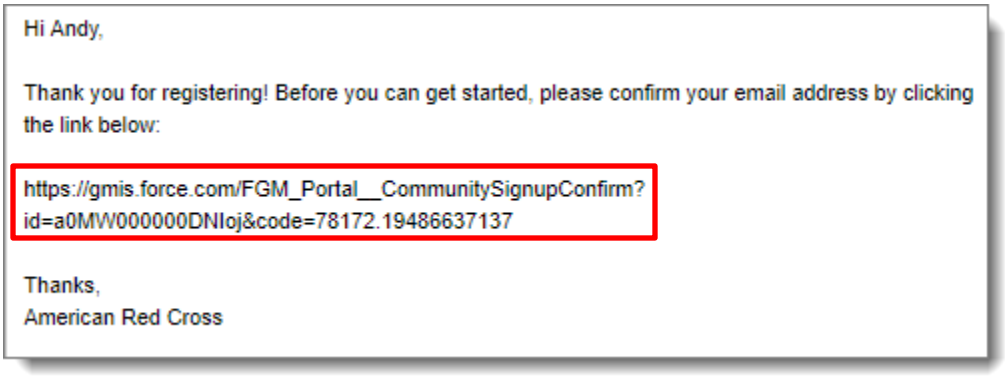
- Complete each page of the *Portal Sign Up* form, clicking *Next* to move to the next page. (Required fields are marked with a red asterisk.).



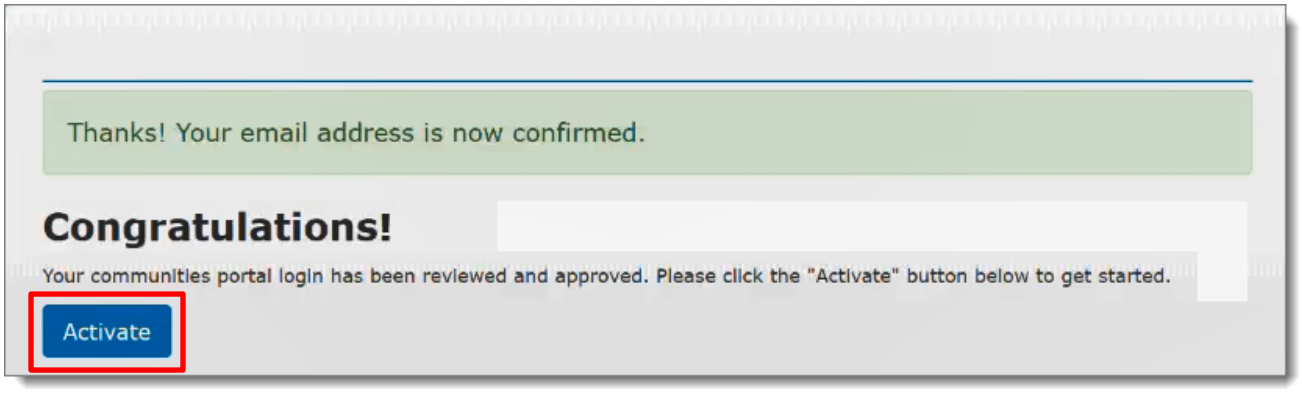
- At the last page, click *Register* to submit your new account information. (GMIS sends an automated email to the email address you entered on the form.)



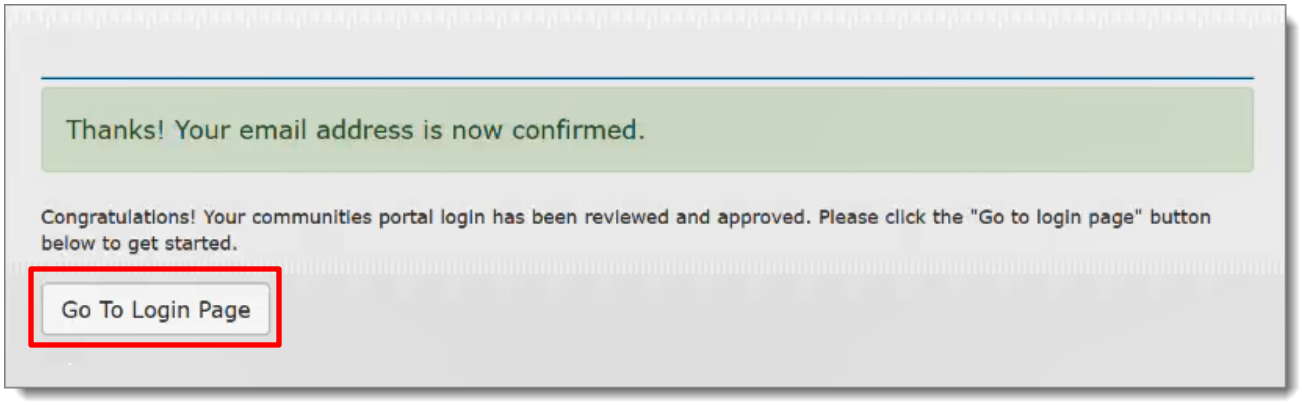
- Open the email and click the link to confirm your email address. (GMIS displays a message indicating that your email address has been confirmed and featuring an *Activate* button.)
    - The email is from *GMIS Applicant Portal Site Guest User* and may be in your *Spam*, *Junk*, or *Clutter* folder. If the link is not clickable, or clicking it takes you to Internet Explorer, copy and paste it into Chrome or Firefox.



- Click *Activate*. (GMIS replaces the *Activate* button with a *Go to Login Page* button.)



- (if desired) Click *Go To Login Page* to return to https://gmis.force.com/ and log into GMIS.



Logging In

Overview

You must log into GMIS to submit a grant proposal, perform scheduled reporting on an existing grant, or submit a grant amendment. And to log in, you must first establish a GMIS account. (For details, see the *Establishing a GMIS Account* section above.)

Summary of Steps

To log into GMIS:

- Navigate to https://gmis.force.com/.
- Enter the *Username* and *Password* you identified when establishing your GMIS account, and then click *Sign In*. (The GMIS Applicant Portal opens to the *Grantee Dashboard* tab.)

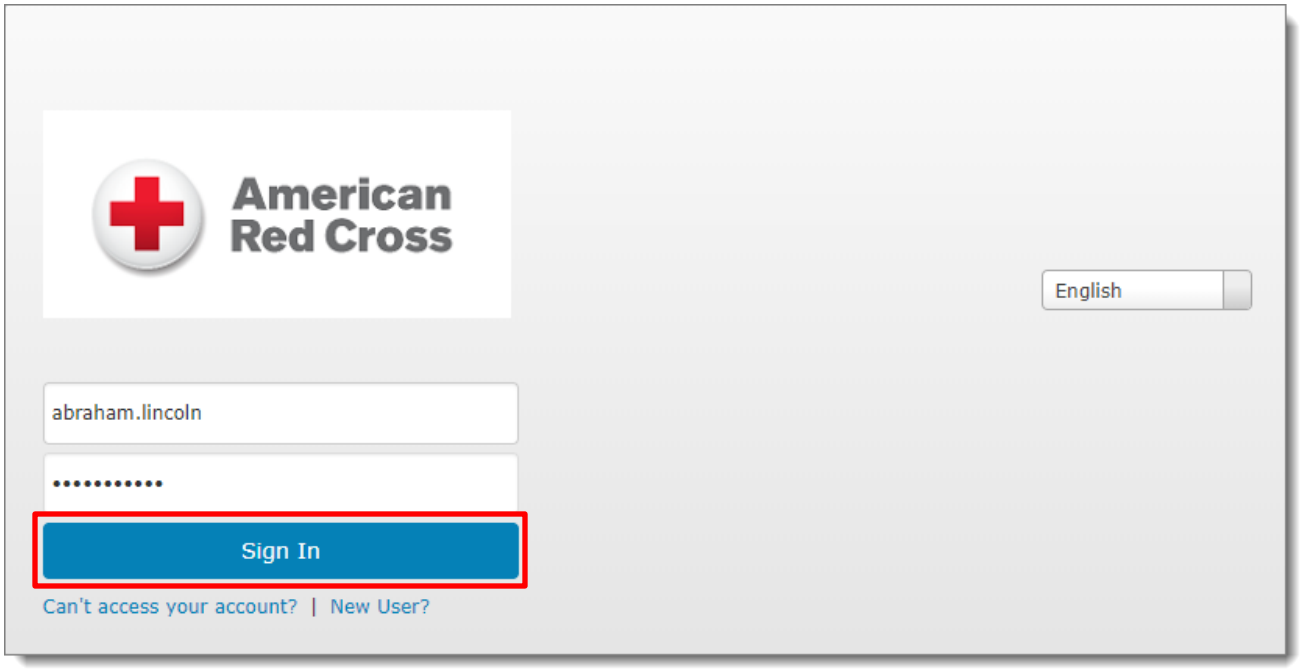
If you have difficulties logging in:

- Click *Can't access your account?* (GMIS launches a help screen.)
- Read the provided information and follow the steps to reset your password, if needed.
- If you are not sure what your *Username* is, please contact gmis.help@redcross.org.

Detailed Steps

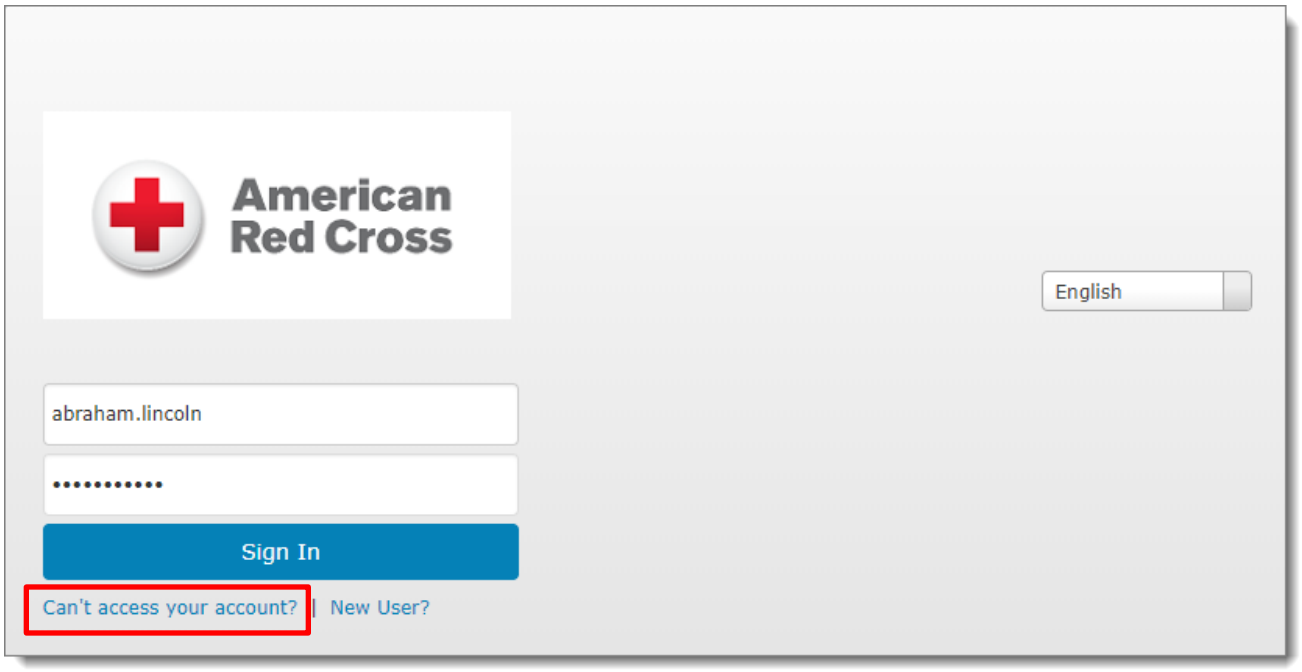
To log into GMIS:

- Navigate to https://gmis.force.com/.
  - It is a good idea to make GMIS a favorite (or bookmark) at your browser.
- Enter the *Username* and *Password* you identified when establishing your GMIS account, and then click *Sign In*. (The GMIS Applicant Portal opens to the *Grantee Dashboard* tab.)



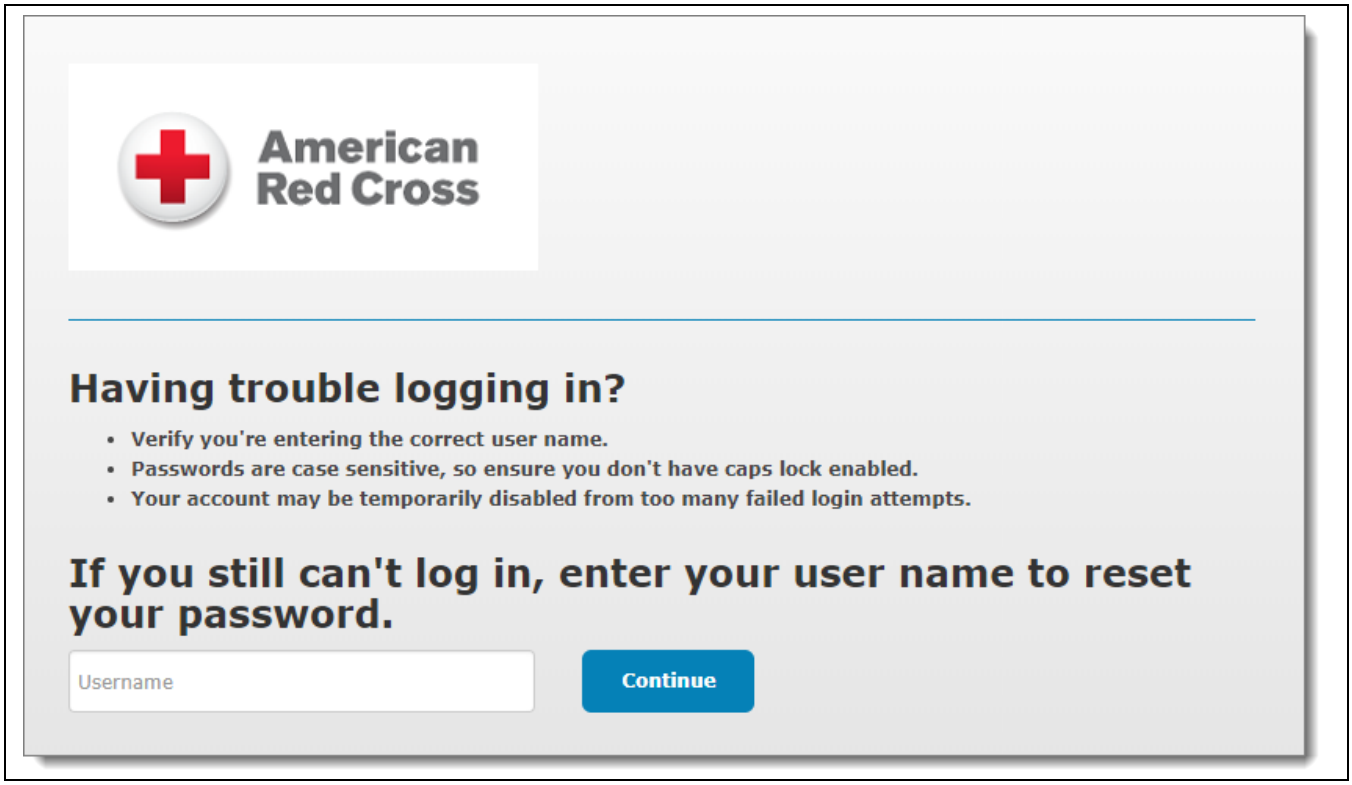
If you have trouble logging in:

- Click *Can't access your account?* (GMIS launches a help screen.)



If you have trouble logging in: (cont.)

- Read the provided information and follow the steps to reset your password, if needed.
- If you are not sure what your *Username* is, please contact gmis.help@redcross.org.


American Red Cross
Having trouble logging in?
Verify you're entering the correct user name.
Passwords are case sensitive, so ensure you don't have caps lock enabled.
Your account may be temporarily disabled from too many failed login attempts.
If you still can't log in, enter your user name to reset your password.
Username
Continue

Submitting a Grant Application

Overview

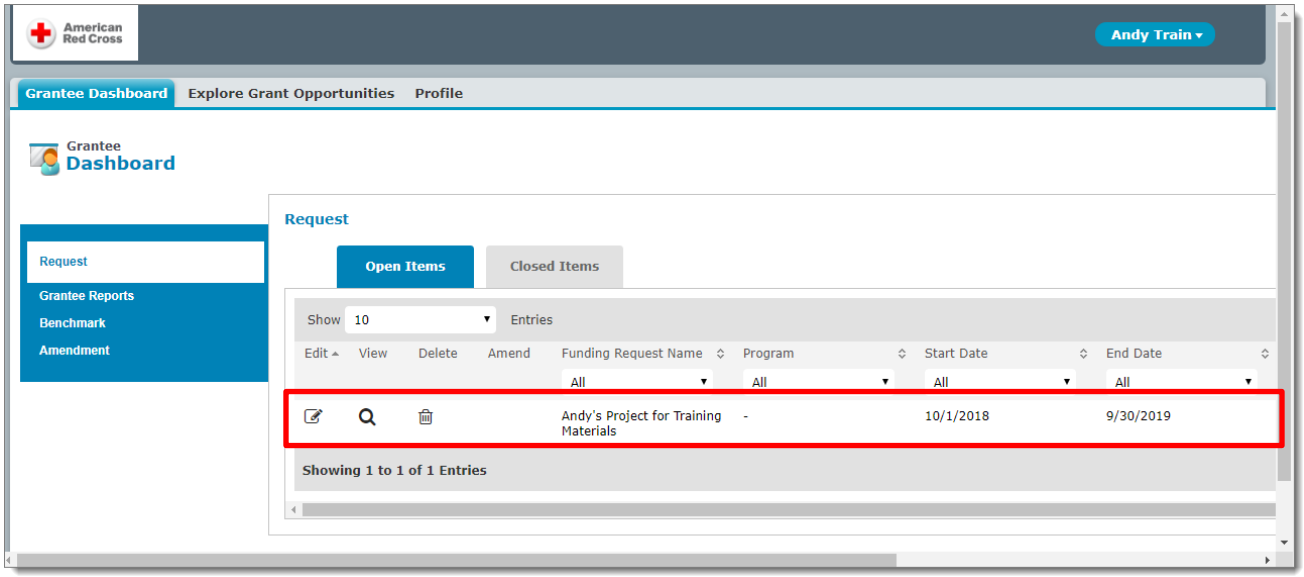
Completing the grant application requires entering information at multiple tabs:

- *Narrative*;
- *Attachments*;
- *Service Delivery Area(s)*;
- *Grant Objectives and Indicators*;
- *Grant Budget*;
- (if applicable) *Sub Grantees*; and
- *Applicant Grant Team Members*.

You do not need to complete the entire grant application at once, but to create and save a draft application that you can complete later, you must initially:

- Complete the required fields at the *Narrative* tab, which are indicated by a red asterisk; and
- Save your entries.

GMIS displays a saved grant application at the default *Request* section of the *Grantee Dashboard*, and you can *Edit*, *View*, or *Delete* it there, as needed.



Once you submit a grant application, you are unable to edit it further unless the Red Cross Grant Team requests that you revise it. A separate process exists for amending an awarded grant; for details, see the *Amending an Awarded Grant* section below.

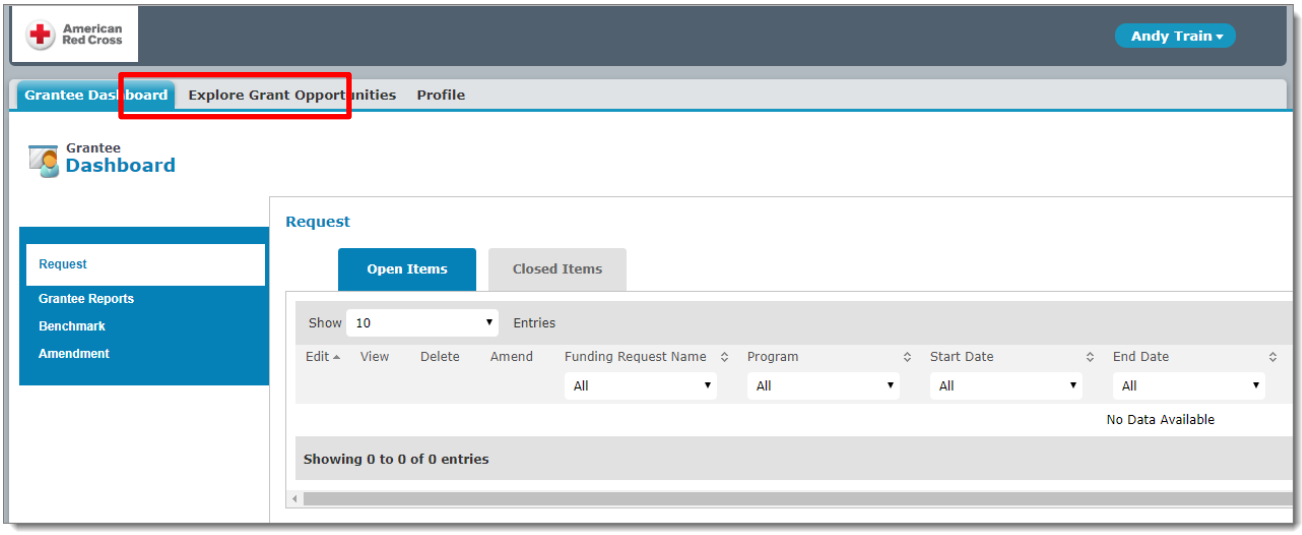
Summary of Steps

To submit a grant application:

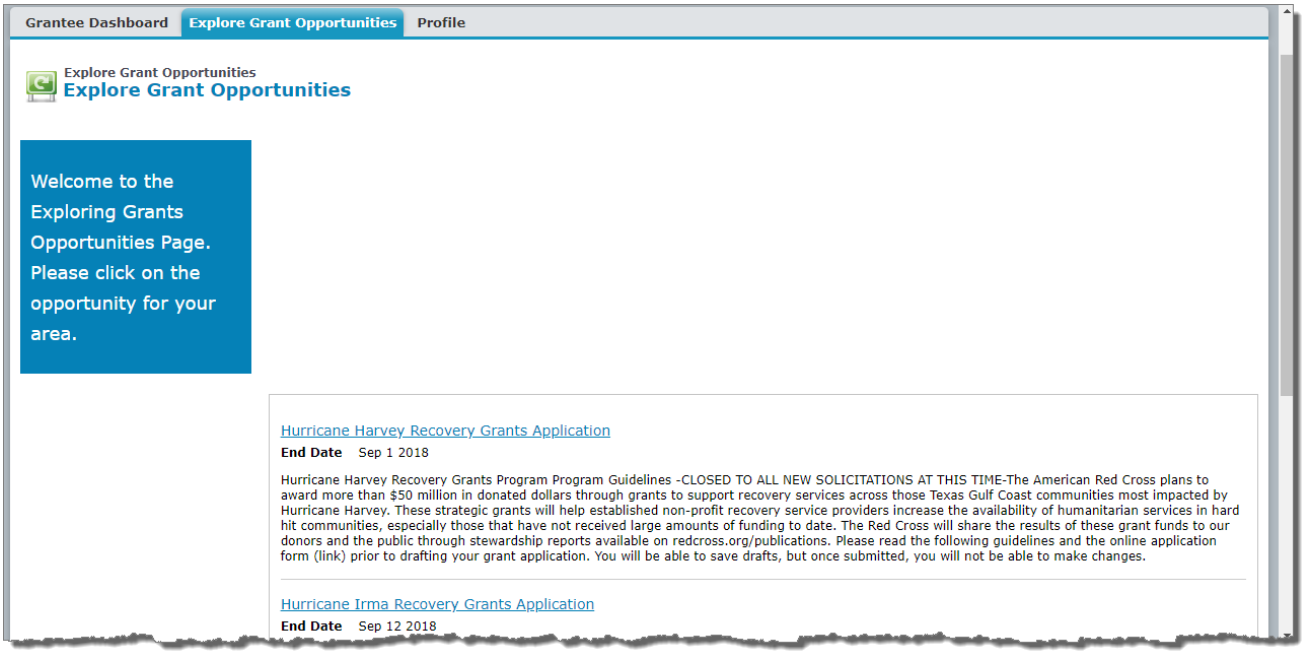
- Log into GMIS;
- Locate the relevant grant program and initiate the grant application;
- Complete the grant application in full; and then
- Review and submit it. (You cannot edit a submitted grant application unless requested to do so by the Red Cross Grant Team.)

Detailed Steps

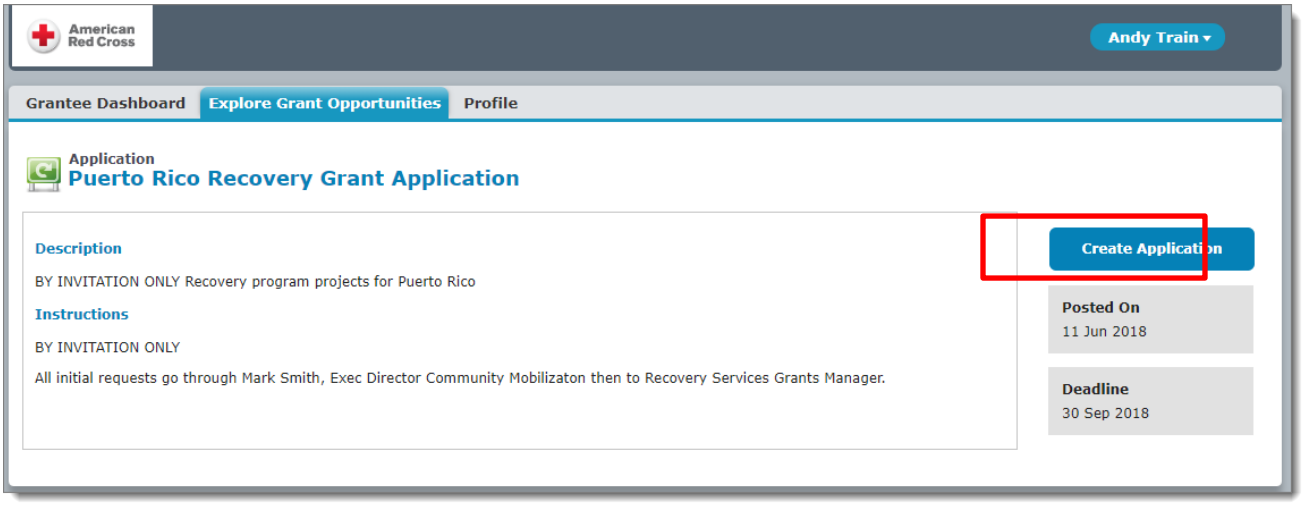
- Log into GMIS. (For details, see the *Logging In* section above.)
- Click the *Explore Grant Opportunities* tab at the GMIS Applicant Portal.



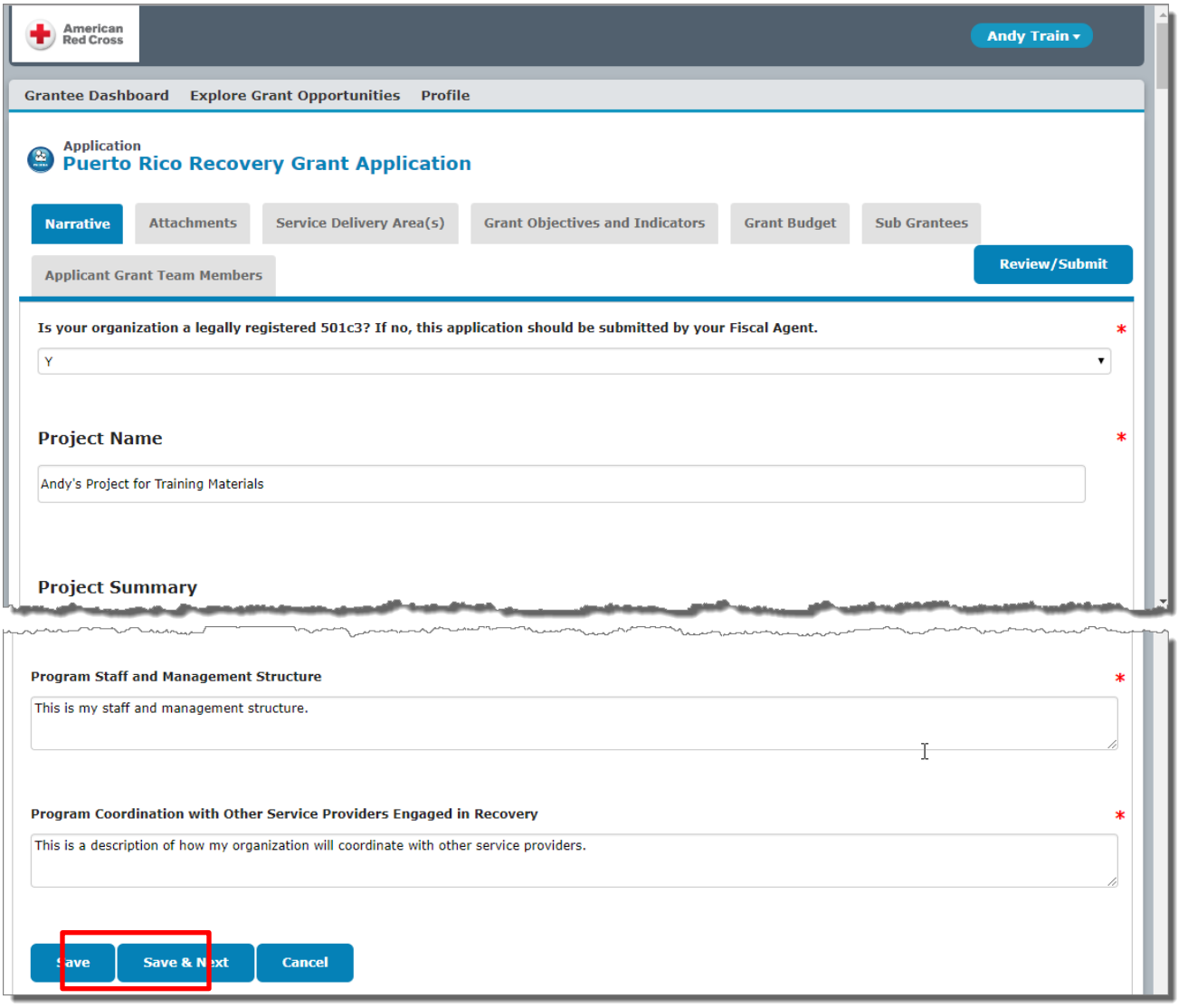
- When you identify a potential grant opportunity for your organization, check its *End Date* and read its description before attempting to apply for it. Some of the listed grant opportunities may be closed or not a good fit for your organization.
- Click a grant opportunity's listing to open its grant application. (GMIS displays a screen with instructions regarding the grant application.)



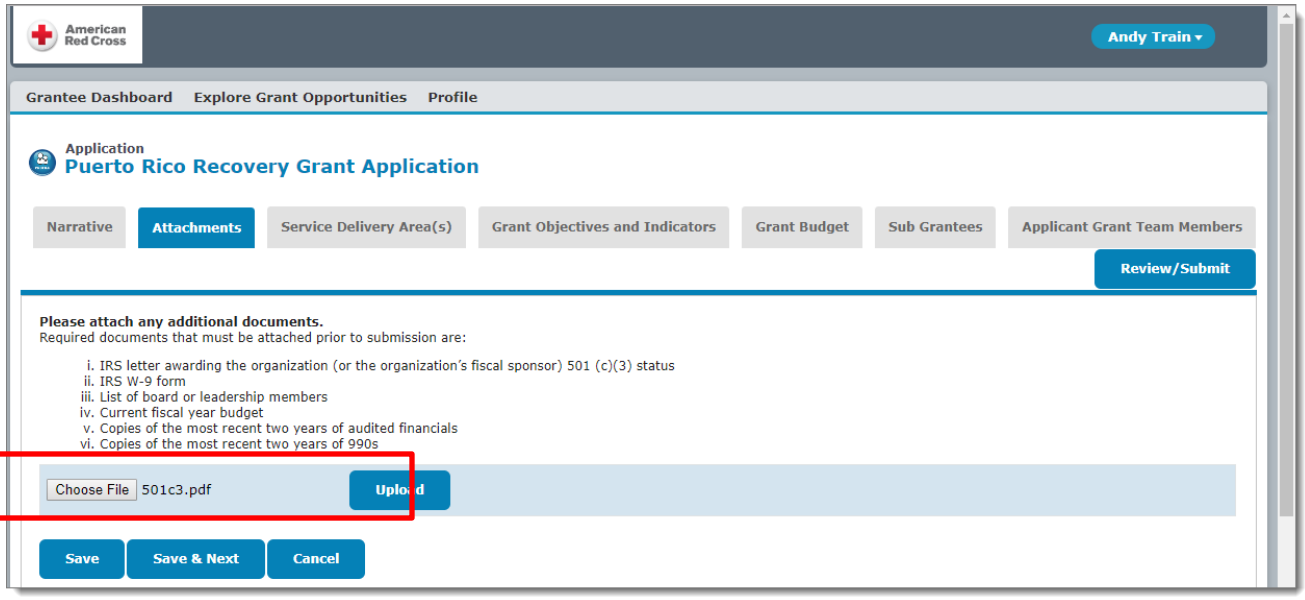
- Consult the grant application's instructions and, if your organization meets the requirements to apply, click *Create Application*. (GMIS opens the grant application to its *Narrative* tab.)



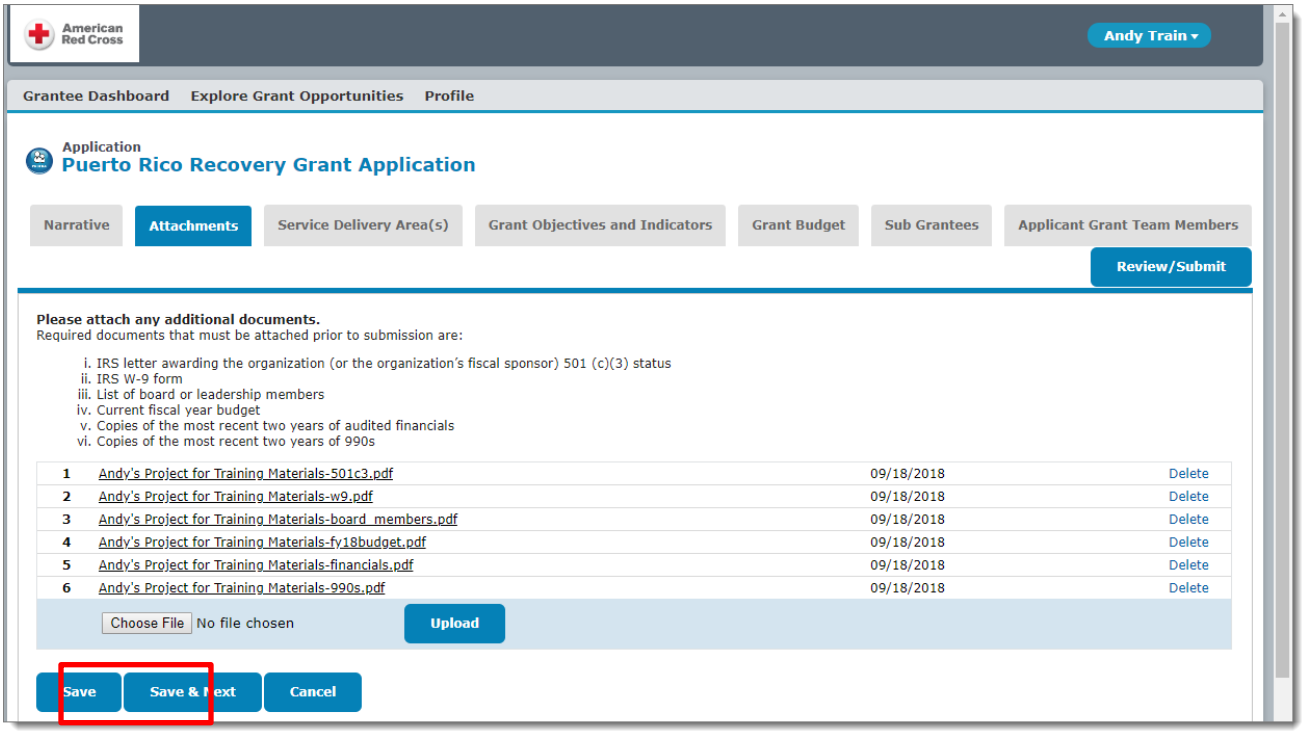
- Enter information at the *Narrative* tab and click *Save & Next* at the bottom of the screen. (GMIS saves the grant application and takes you to its *Attachments* tab. Required fields are indicated by a red asterisk. If you want to save the application and return to it later, you can click *Save* instead.)



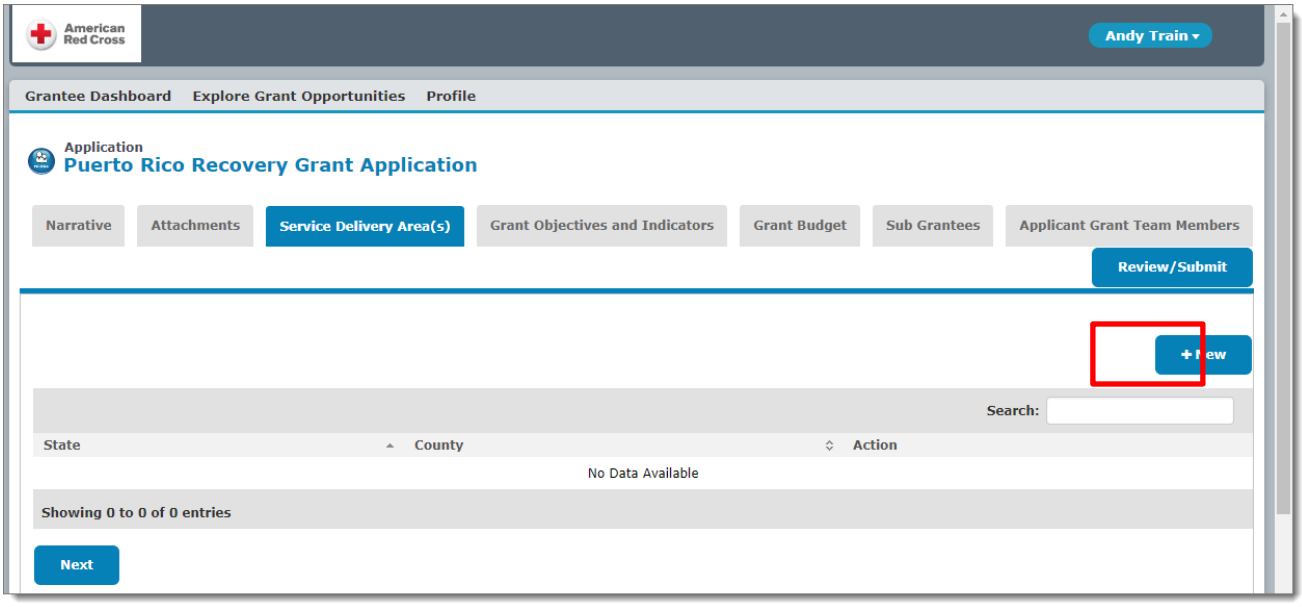
- Attach all the required documents listed at the *Attachments* tab.
  - Click *Choose File*.
  - Navigate to and select the desired document file. (GMIS lists the selected file beside the *Choose File* button.)
  - Click *Upload*. (GMIS lists the uploaded file along with the date and a *Delete* link that you can use if you mistakenly upload the wrong document.)



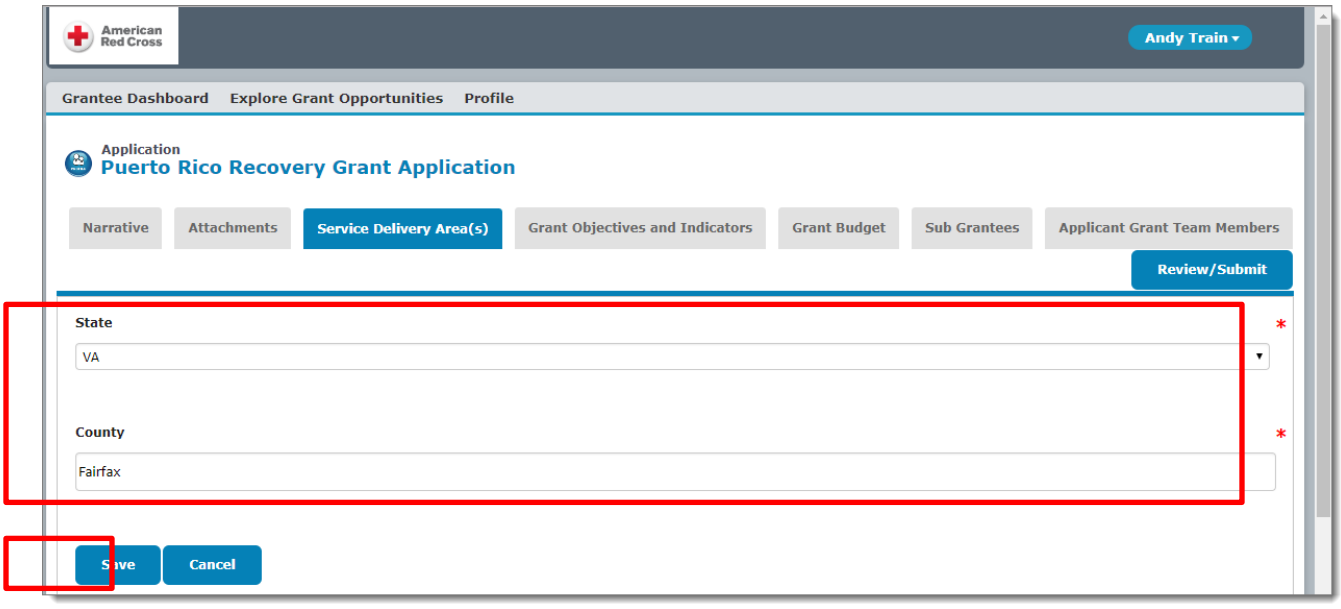
- Attach all of the required documents listed at the *Attachments* tab. (cont.)
  - Repeat the steps for uploading documents until you have uploaded them all. (Be sure to upload all needed documents. A missing document could delay review and consideration of your grant application.)
  - Click *Save & Next*. (GMIS saves your updates to the grant application and takes you to its *Service Delivery Area(s)* tab. If you want to save the application and return to it later, you can click *Save* instead.)



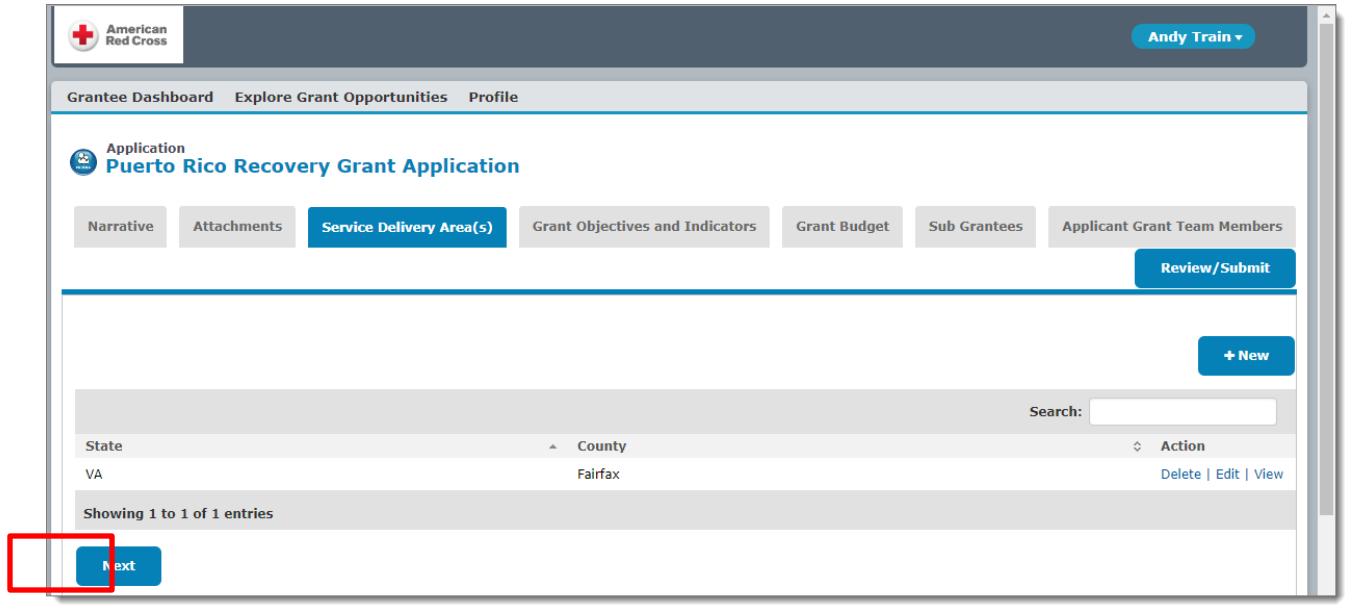
- Record the service delivery area(s) related to the grant application.
  - Click *+New*. (GMIS displays a *State* and *County* field.)



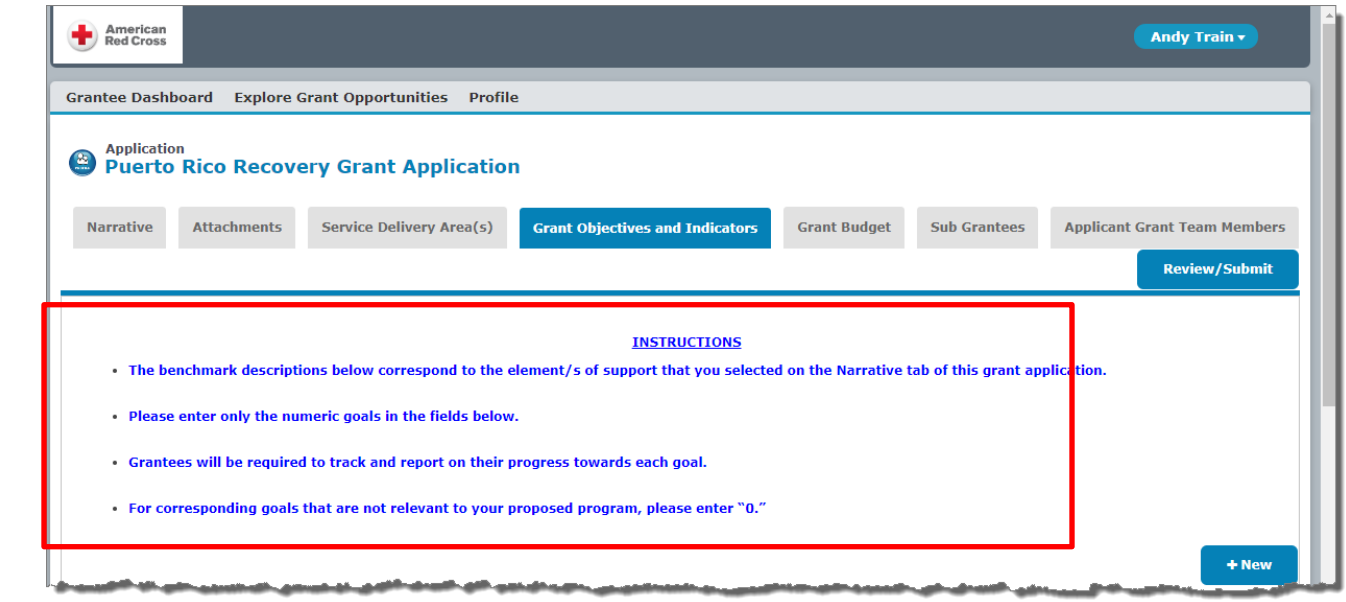
- Record the service delivery area(s) related to the grant application. (cont.)
  - Select the relevant *State*.
  - Enter the relevant county or counties in the *County* field.
  - Click *Save*. (GMIS lists the service delivery area along with links to *Delete*, *Edit*, or *View* it, as needed.)



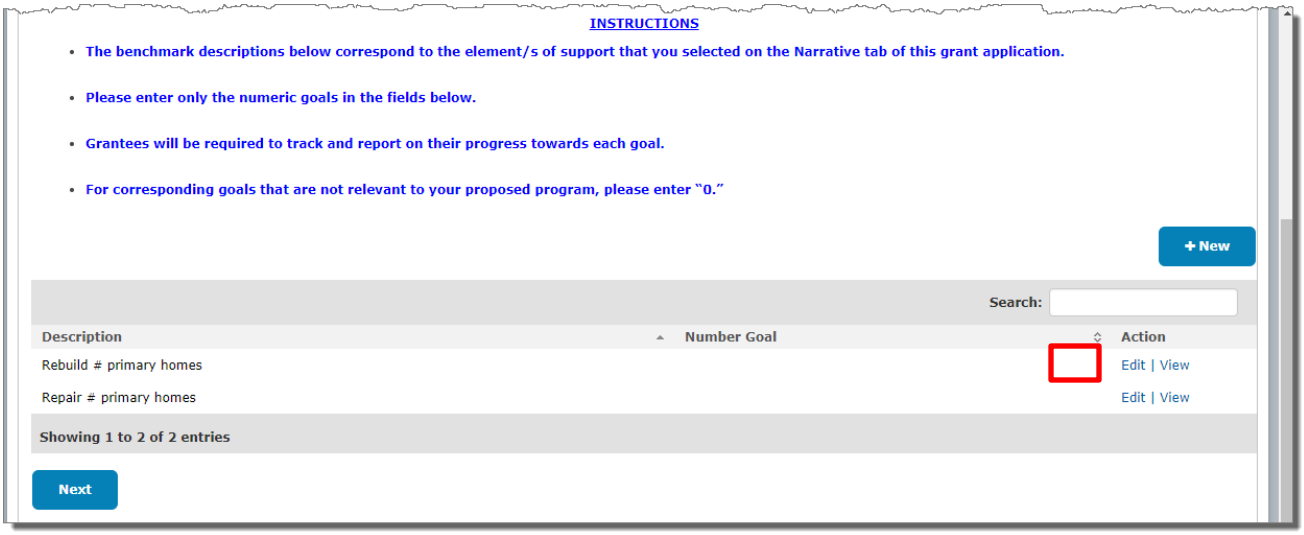
- Record the service delivery area(s) related to the grant application. (cont.)
  - Repeat the steps for adding a service delivery area until you have added them all.
  - Click *Next*. (GMIS takes you to the *Grant Objectives and Indicators* tab.)



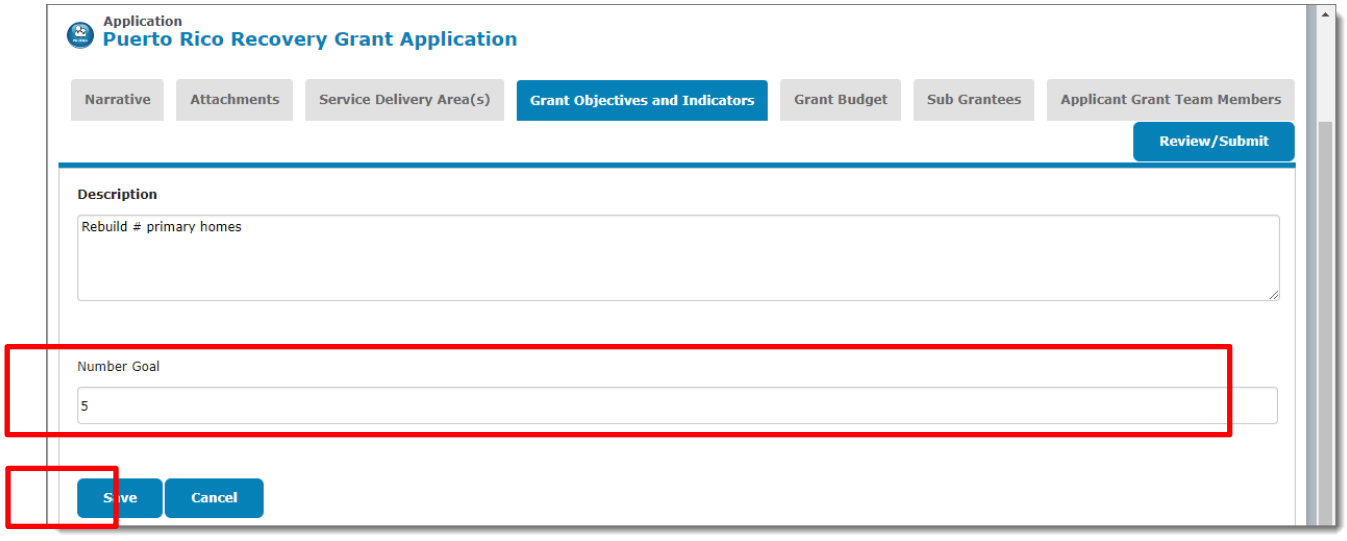
- Record numeric goals in relation to grant objectives.
  - Read the instructions at the *Grant Objectives and Indicators* tab.



- Record numeric goals in relation to grant objectives. (cont.)
  - Scroll down to the listed benchmark descriptions, and click *Edit* for the first one. (GMIS displays the *Description* and *Number Goal* fields for that benchmark description.)



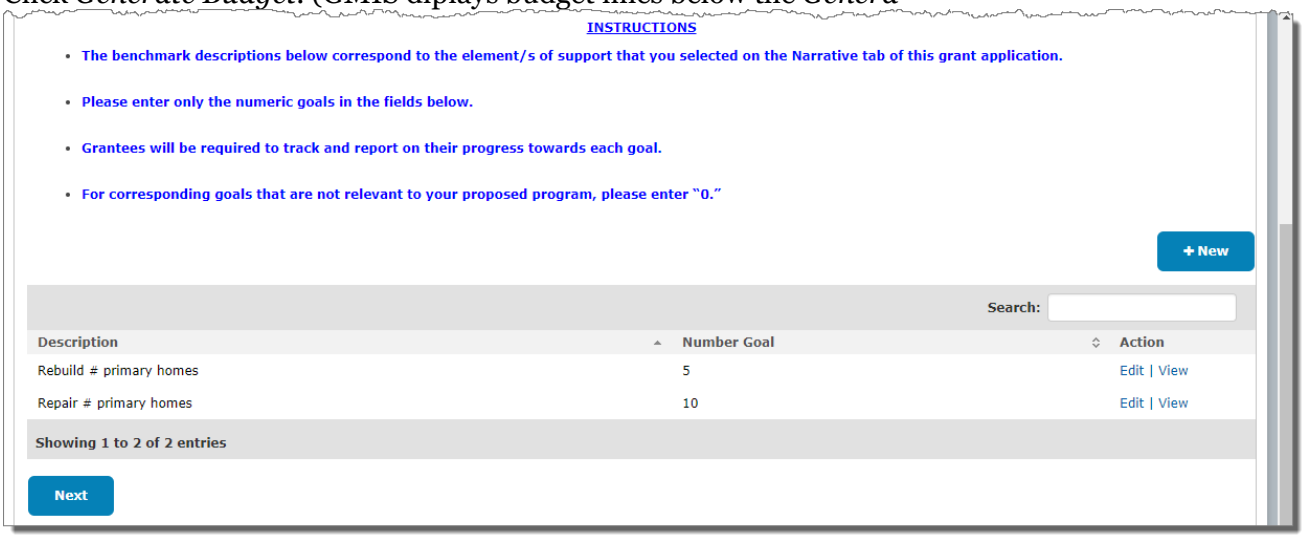
- Record numeric goals in relation to grant objectives. (cont.)
  - (as needed) Edit the default *Description*.
  - Enter the *Number Goal*.
  - Click *Save*. (GMIS saves the updated benchmark desctiption and displays it at the *Grant Objectives and Indicators* tab along with links to *Edit* or *View* it, as needed.)



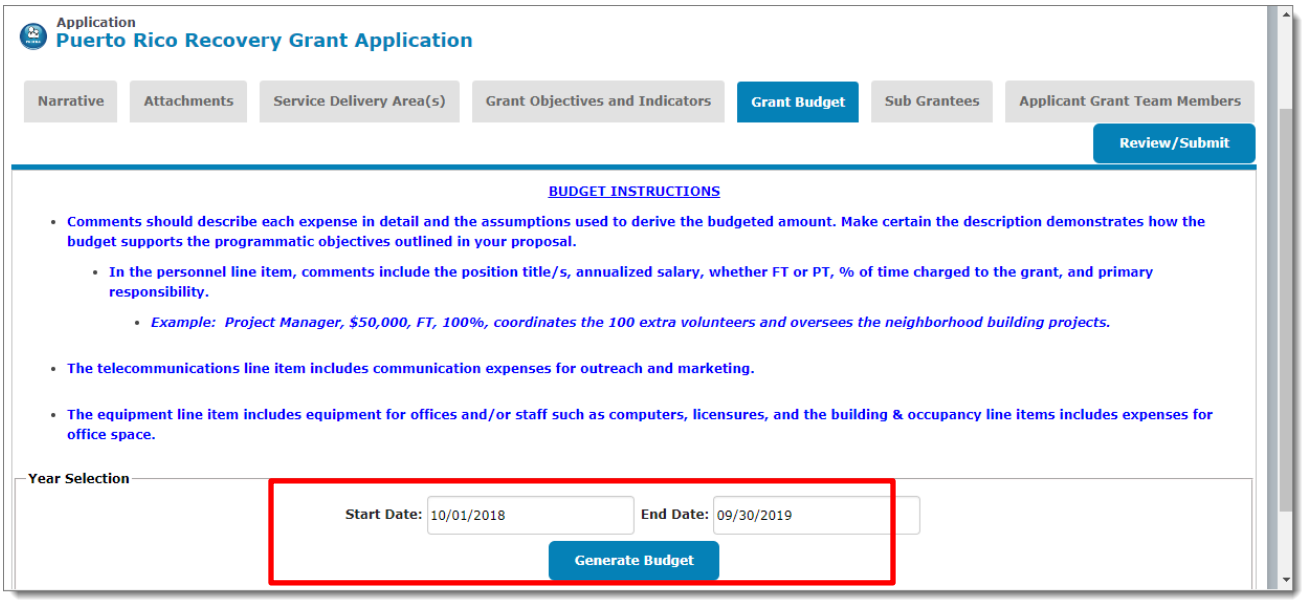
- Record numeric goals in relation to grant objectives. (cont.)
  - Repeat the steps for recording numeric goals for each of the displayed benchmark descriptions. (If a benchmark description does not apply to your proposed program, enter zero.)
  - (if needed) Click *+New* to create additional benchmark descriptions and record numeric goals for them.
  - Click *Next*. (GMIS takes you to the *Grant Budget* tab.)

- Enter the grant budget.
  - Read the instructions at the *Grant Budget* tab.
  - Enter the *Start Date* and *End Date* for the grant budget. (The screen shot below shows a calendar year, but a grant budget may be targeted to a different time frame.)

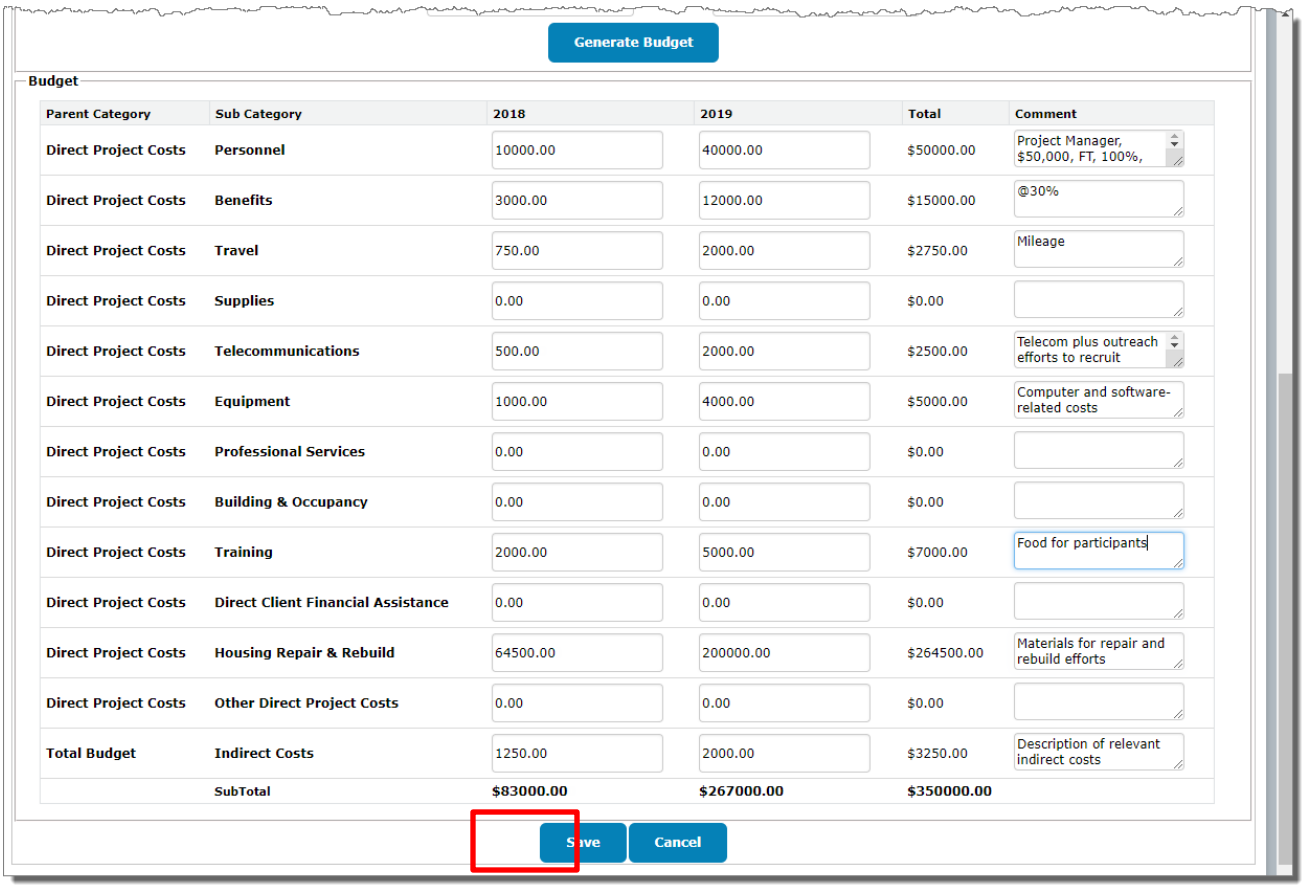
- Click *Generate Budget*. (GMIS diplays budget lines below the *Genera*



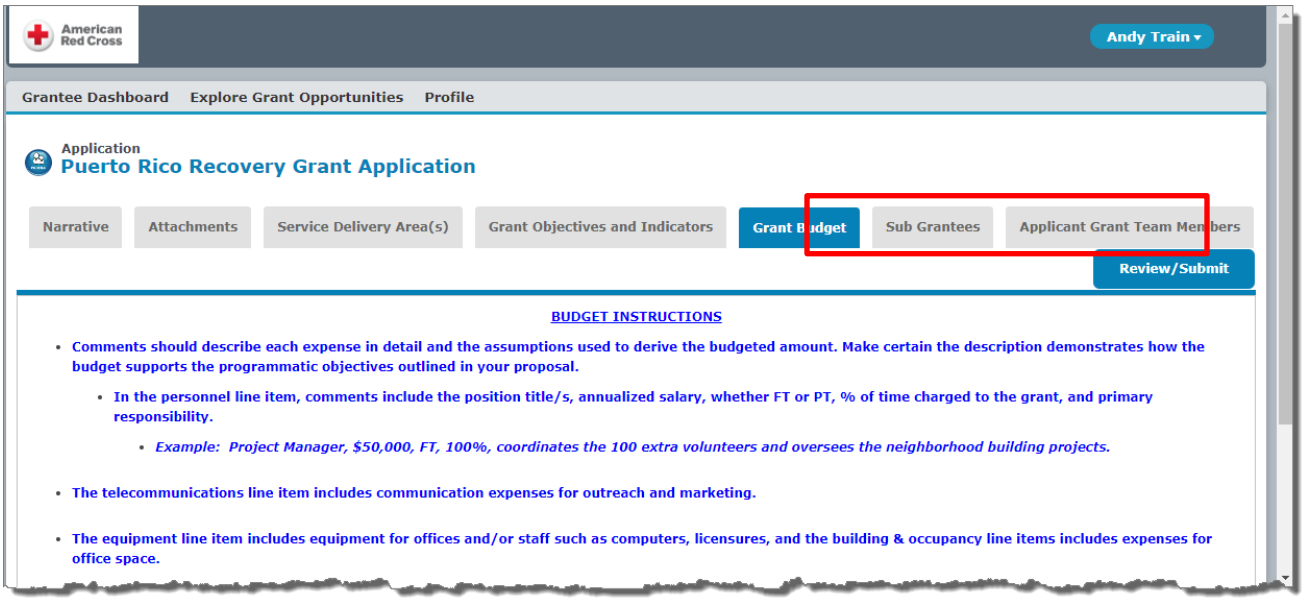
te Budget button.)



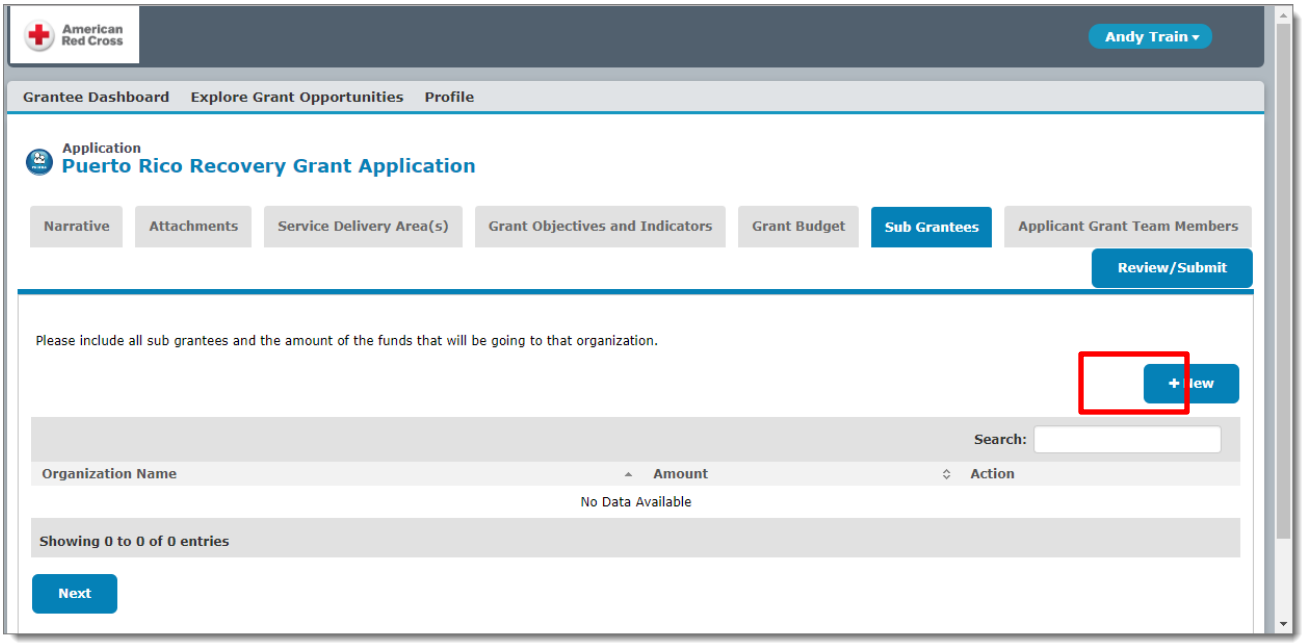
- Enter the grant budget. (cont.)
  - Enter budget information and click *Save*. (GMIS saves your budget values and replaces the *Save* button with an *Update* button. Click *Update* to save any budget updates.)



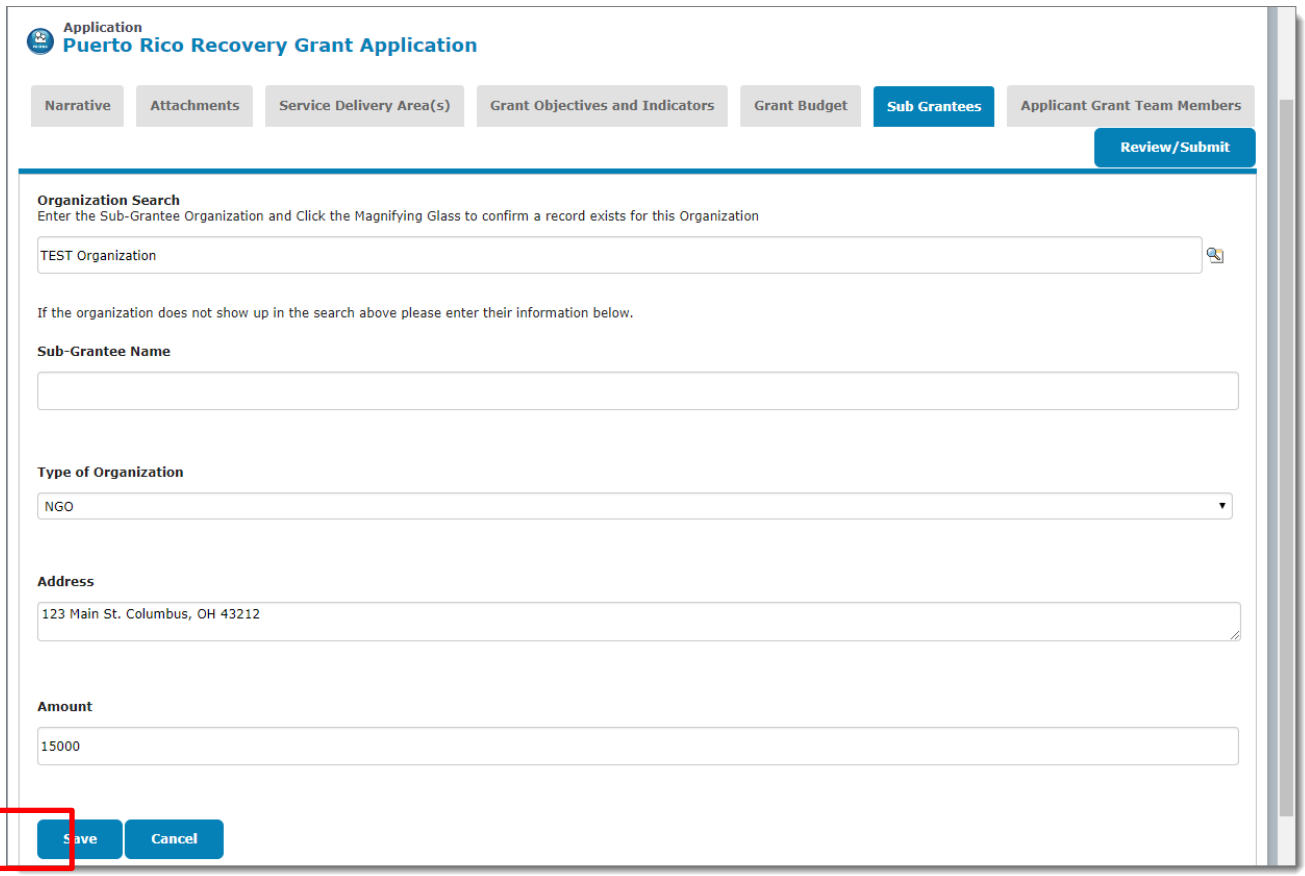
- If your grant proposal includes sub-grantees, click the *Sub Grantees* tab; if not, click the *Applicant Grant Team Members* tab.



- (if applicable) Enter your sub-grantees and the amount of the funds that will go to each.
  - Click *+New*. (GMIS displays fields for entering sub-grantee information.)

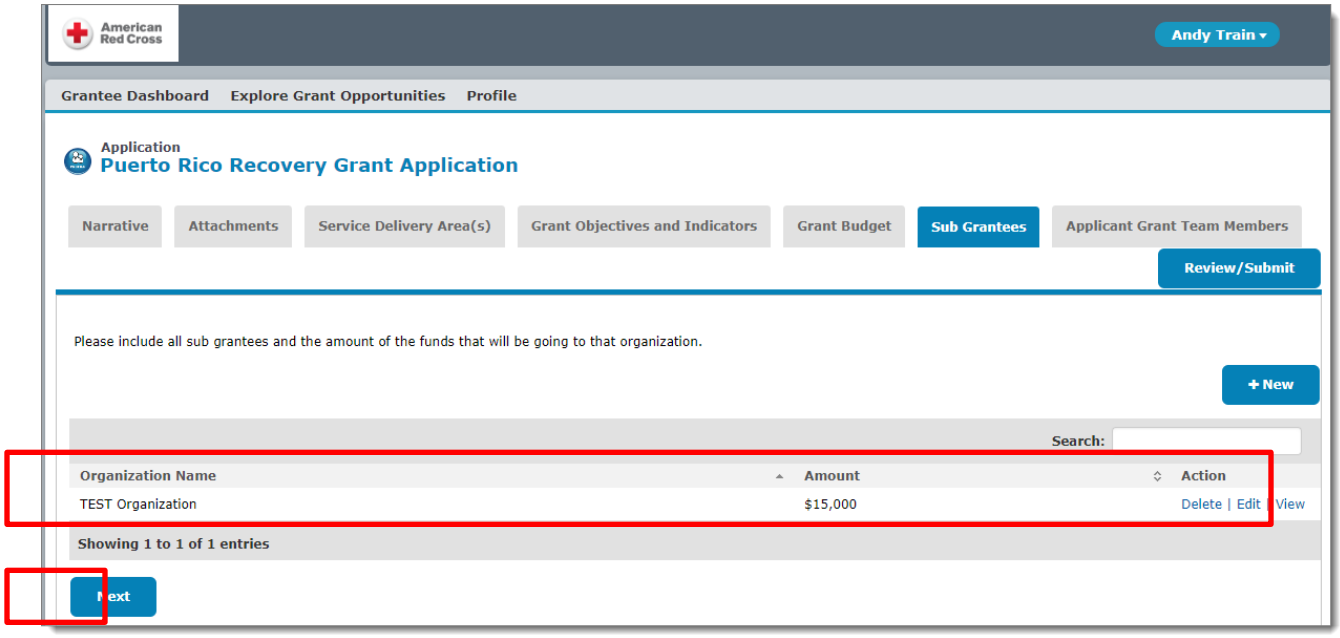


- (if applicable) Enter your sub-grantees and the amount of the funds that will go to each. (cont.)
  - Enter the sub-grantee information.
  - Click *Save*. (GMIS dsiplays the sub-grantee record along with links to *Delete*, *Edit*, or *View* it, as needed.)

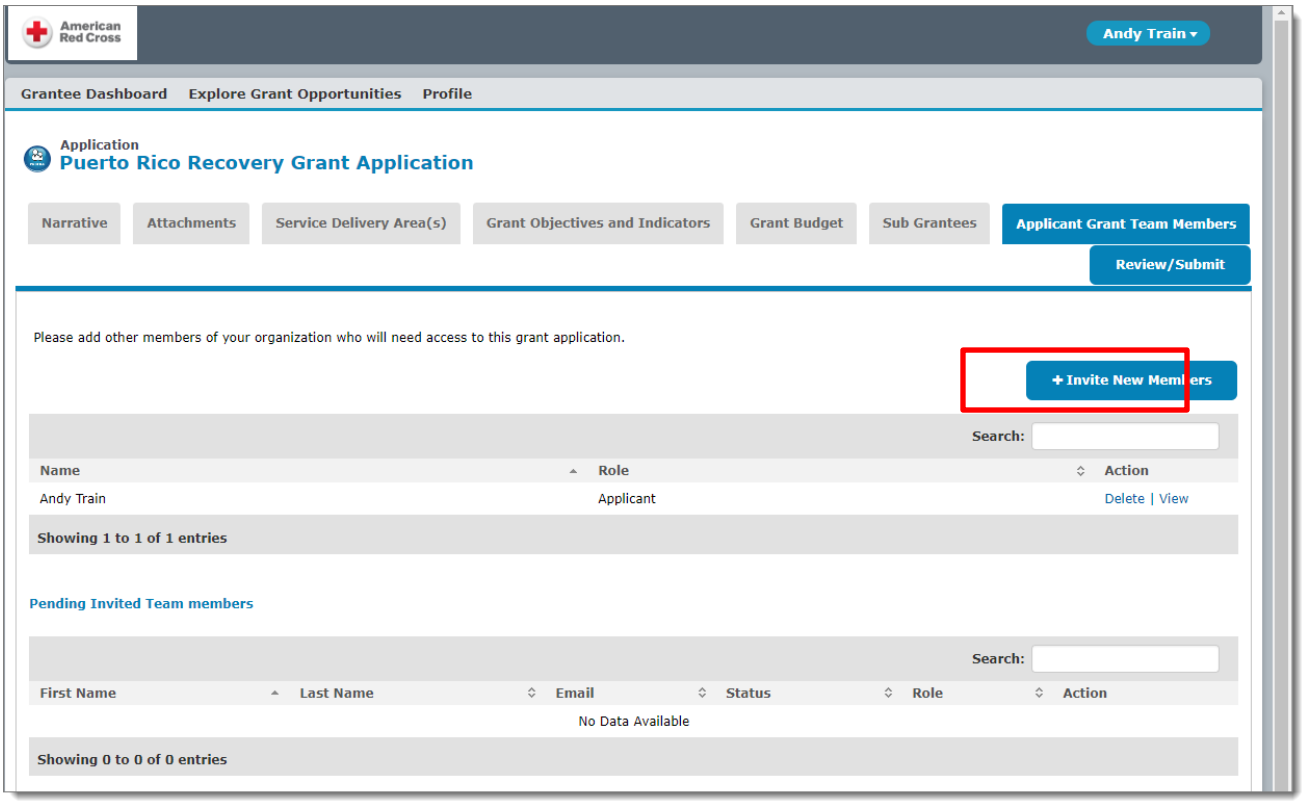


- (if applicable) Enter your sub-grantees and the amount of the funds that will go to each. (cont.)

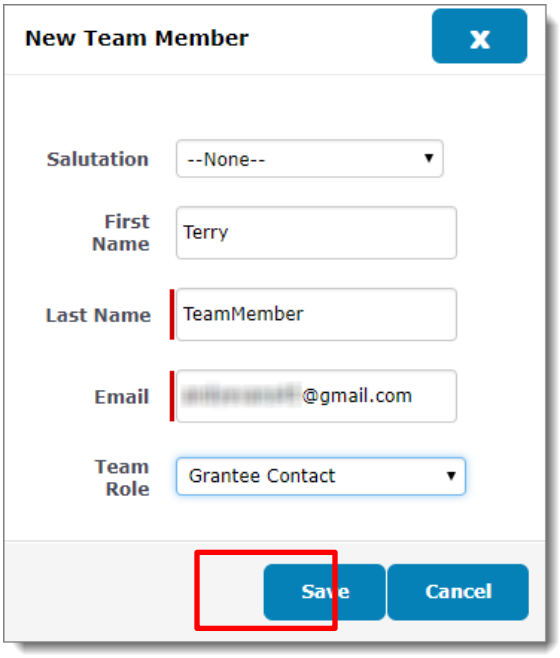
- Repeat the steps for entering sub-grantees as needed.
- Click *Next*. (GMIS takes you to the *Applicant Grant Team Members* tab, where your *Name* and *Role* are already listed.)



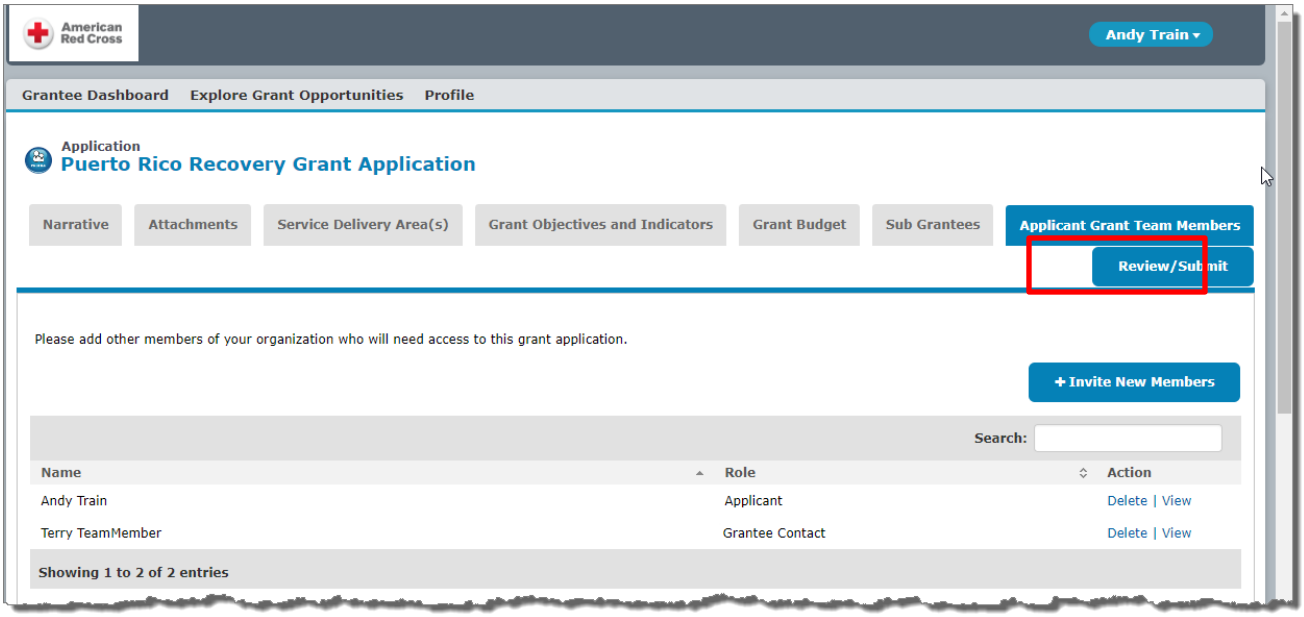
- (as needed) Add additional members to your Grant Application Team, so they can access your grant application in GMIS.
  - Click *+Invite New Members*. (GMIS launches a *New Team Member* window.)



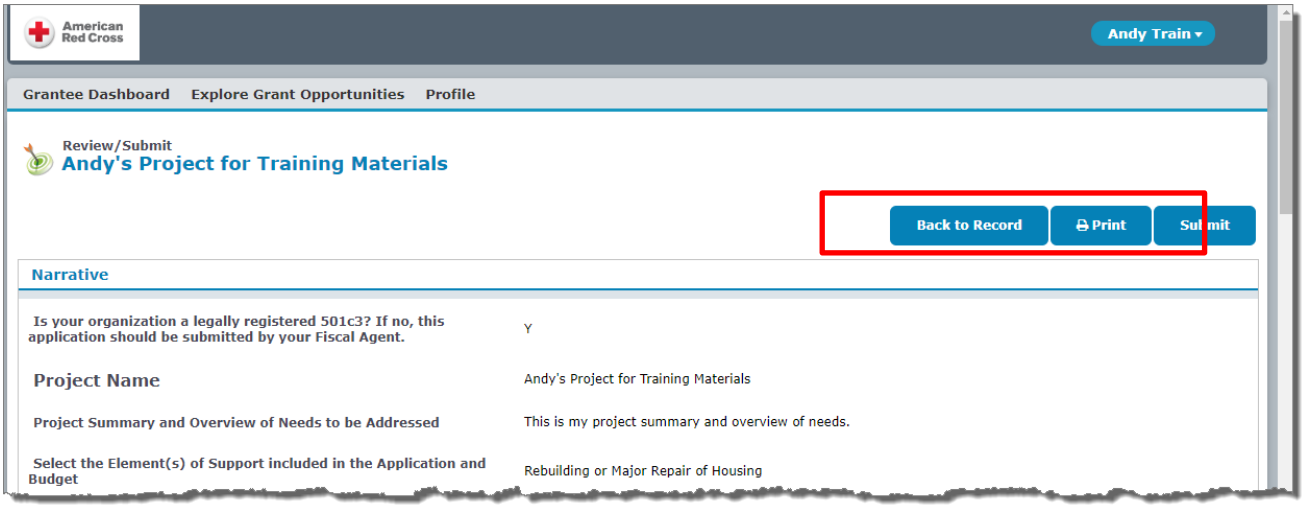
- (as needed) Add additional members to your Grant Application Team, so they can access your grant application in GMIS. (cont.)
  - Enter the team member's information (required fields feature a red bar) and then click *Save*. If you designate a *Team Role*, be sure to select *Grantee Contact*. (GMIS lists the team member in the *Pending Invited Team Members* portion of the *Applicant Grant Team Members* screen, along with links to *Delete*, *Edit*, or *View* the listing, as needed. It also sends them an email invitation to join the team. Once they click the link in the email inviation and create a GMIS account, they can log into GMIS and work with the grant application, and GMIS removes them from the *Pending Invited Team Members* section and lists them as a full team member on the *Applicant Grant Team Members* screen. Note that a portion of the email address is intentionally blurred in the screen shot below.)



- (as needed) Add additional members to your Grant Application Team, so they can access your grant application in GMIS. (cont.)
  - Repeat the steps for adding additional members to your Grant Application Team, as needed.
- Review the grant application.
  - Click *Review/Submit*. (GMIS displays the entire grant application on a single screen in read-only mode.)



- Review the grant application. (cont.)
  - Scroll down to review the entire grant application.
- If you need to make any updates:
  - Click *Back to Record* to return to the editable view of the grant application;
  - Make and save the update(s); and
  - Click *Review/Submit* to review your updates.
- (if desired) Click *Print* to print the completed grant application before sumbitting it.
- Submit the grant application.
  - Click *Submit* and then click *OK* at the *Are you sure you want to submit? You will not be able to edit this form once it is submitted.* message.(GMIS submits your grant application and takes you to the *Request* section of the *Grantee Dashboard*, where the grant application is still listed but without an *Edit* link. A separate process exists for amending an awarded grant; for details, see the *Amending an Awarded Grant* section below.)



Submitting a Grant Report

Overview

After being awarded a grant, a Grantee is required to submit grant reports, which are scheduled, typically quarterly, by a Red Cross Grants Manager. You will receive automated email reminders from your Grants Manager when a required grant report is due.

Summary of Steps

To submit a grant report:

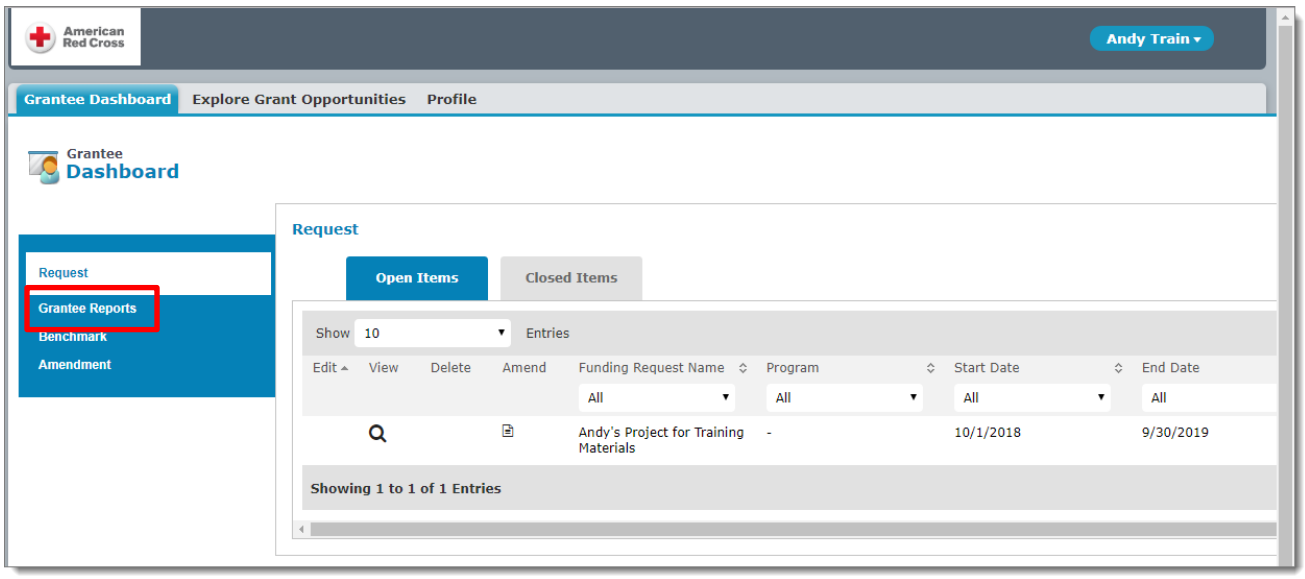
- Log into GMIS;
- Click *Grantee Reports*;
- Click the *Edit* icon for the desired report;
- Complete each of the report's tabs; and
- Review and submit the report.

You do not need to complete the entire grant report at once, but you must initially complete the fields at the *Narrative* tab and save your entries to create and save a draft report that you can complete later but before the required submission date. GMIS displays a grant report at the *Grantee Reports* section of the *Grantee Dashboard*, and you can *Edit* or *View* it there, as needed.

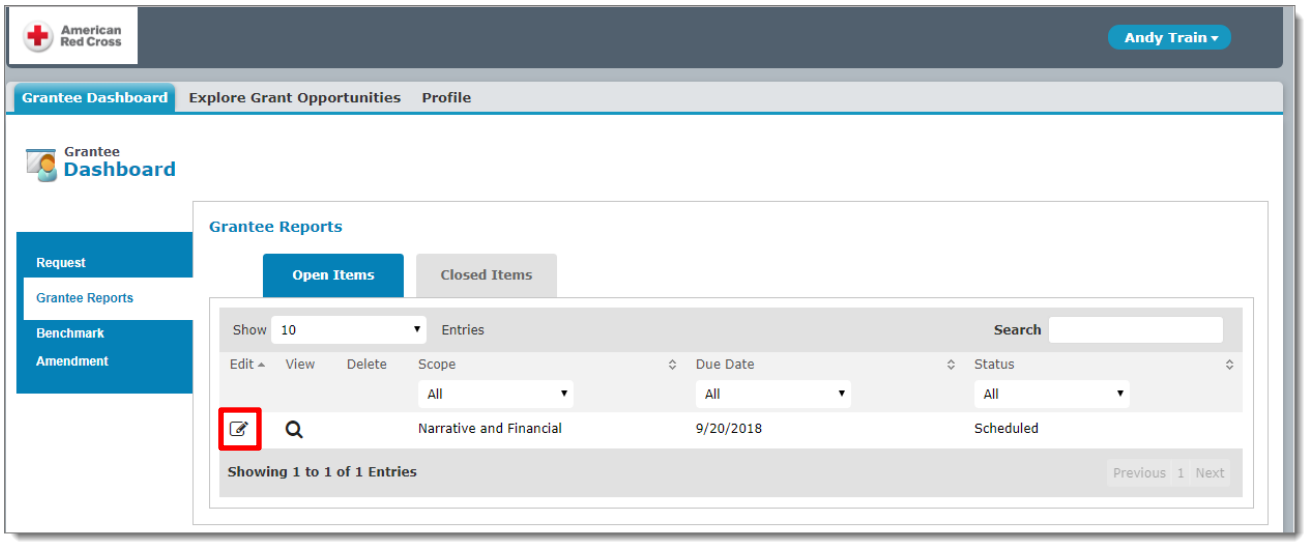
Once you submit a grant report, you are unable to edit it further until the Red Cross Grant Team reviews it and determines if revisions are needed. If you need to make revisions, the Red Cross Grant Team will instruct you to log into GMIS and edit the report.

Detailed Steps

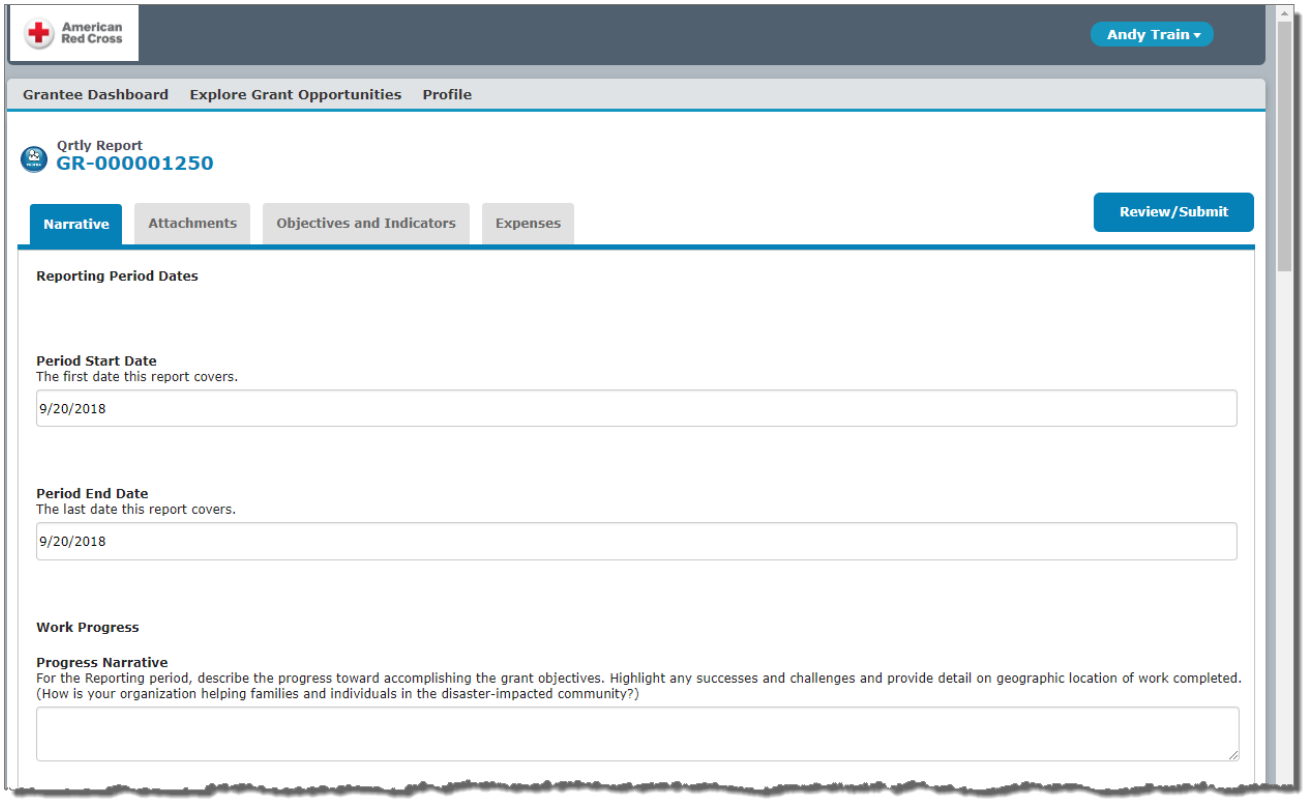
- Log into GMIS. (For details, see the *Logging In* section above.)
- Click *Grantee Reports* at the GMIS Applicant Portal's *Grantee Dashboard*.



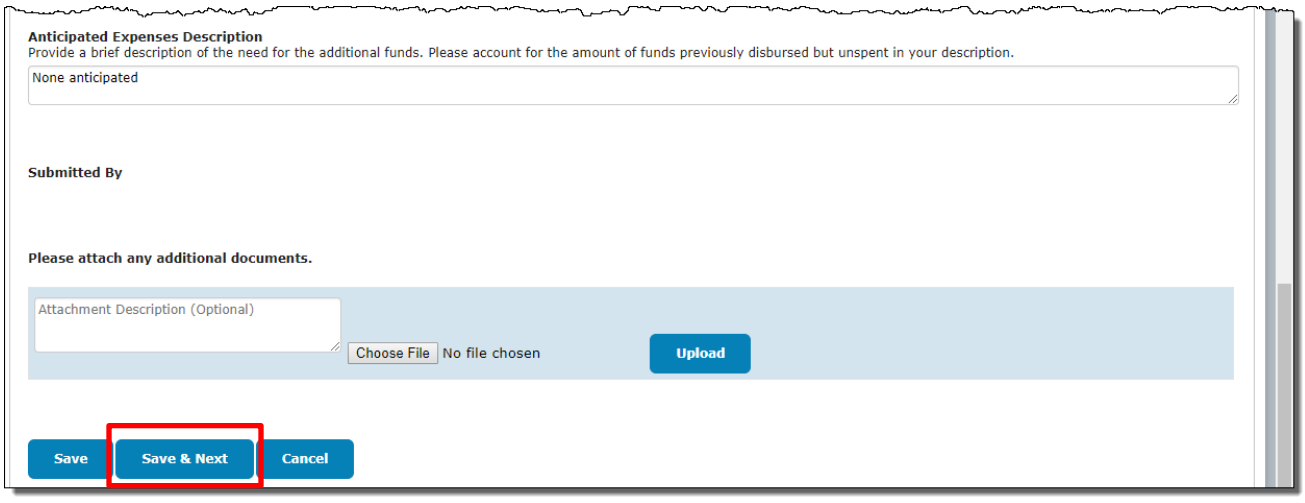
- Click the *Edit* icon for the desired report. (GMIS opens the report to its *Narrative* tab.)



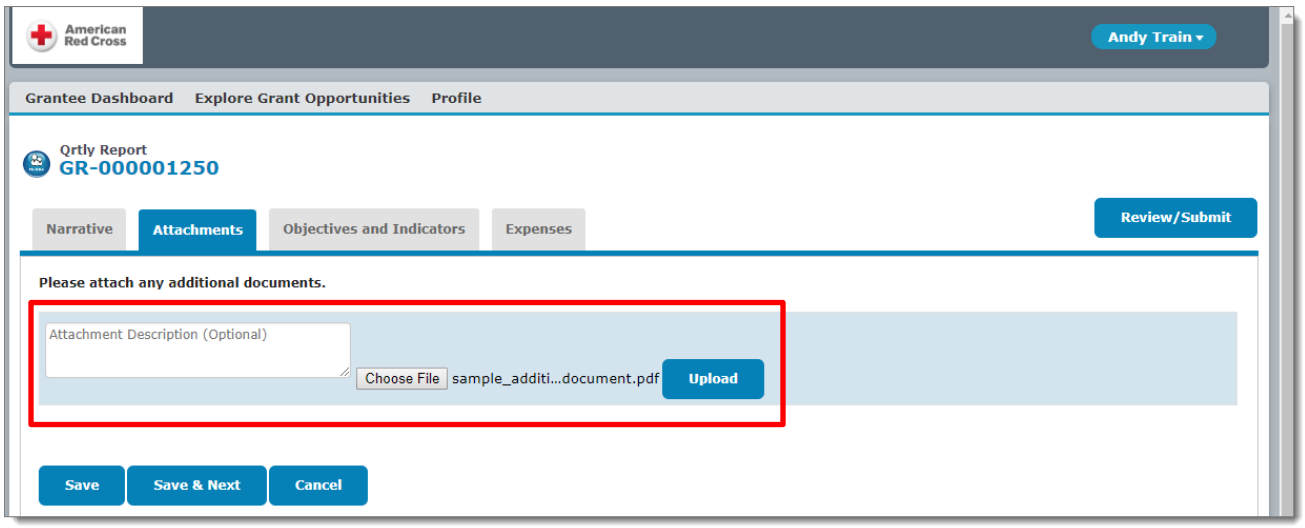
- Complete the fields at the *Narrative* tab, but do not use that tab's document attachment feature; GMIS has a separate tab for attaching documents.



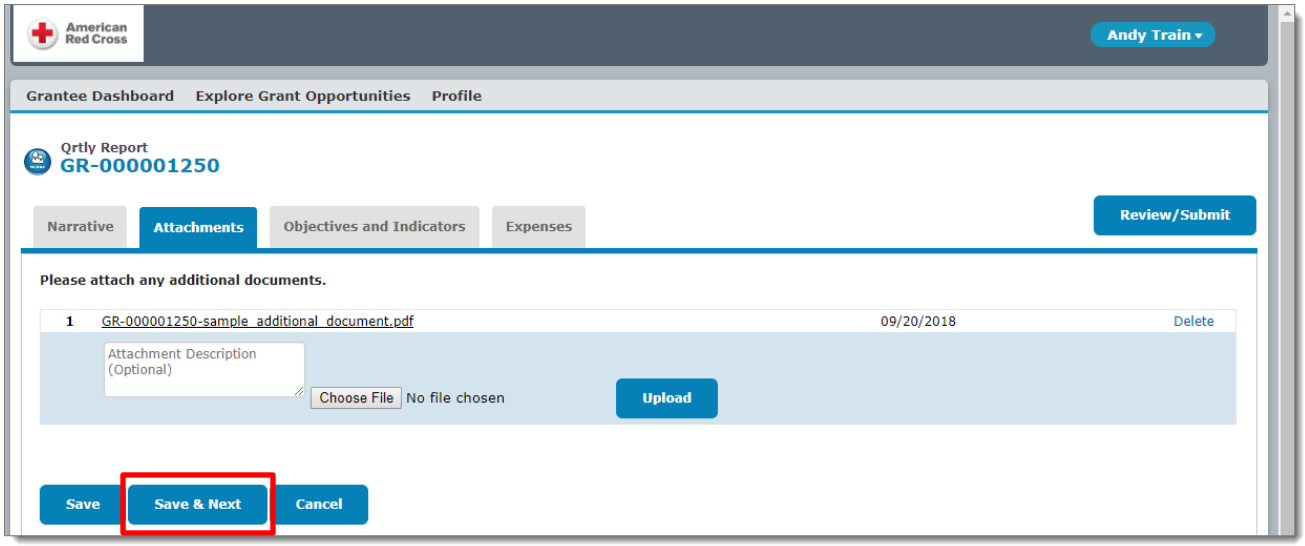
- Click *Save & Next*. (GMIS saves the report and takes you to its *Attachments* tab. If you want to save the report and return to it later, you can click *Save* instead.)



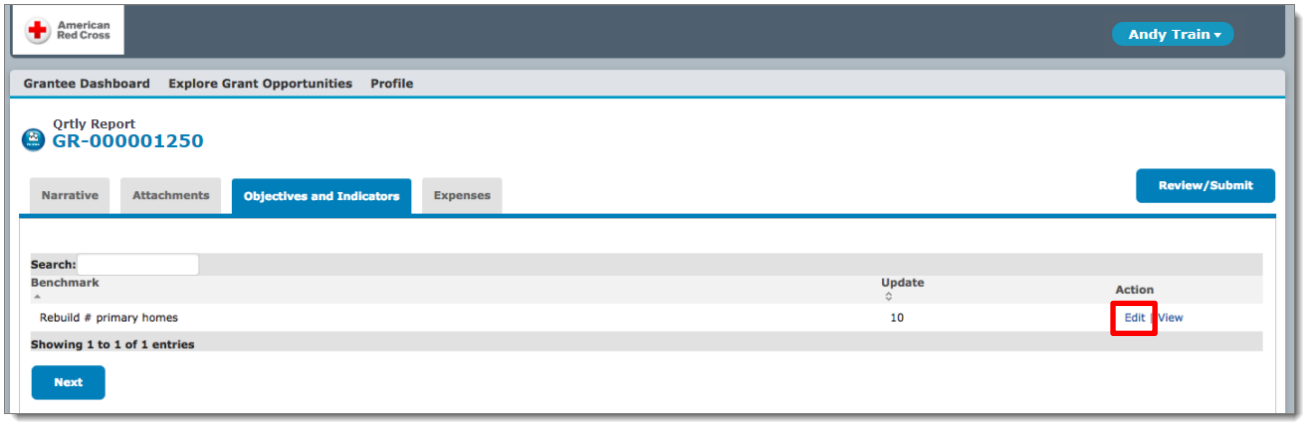
- Attach any desired documents at the *Attachments* tab.
  - (optional) Enter a description for the document you are attaching.
  - Click *Choose File*.
  - Navigate to and select the desired document file. (GMIS lists the selected file beside the *Choose File* button.)
  - Click *Upload*. (GMIS lists the uploaded file along with the date and a *Delete* link that you can use if you mistakenly upload the wrong document.)



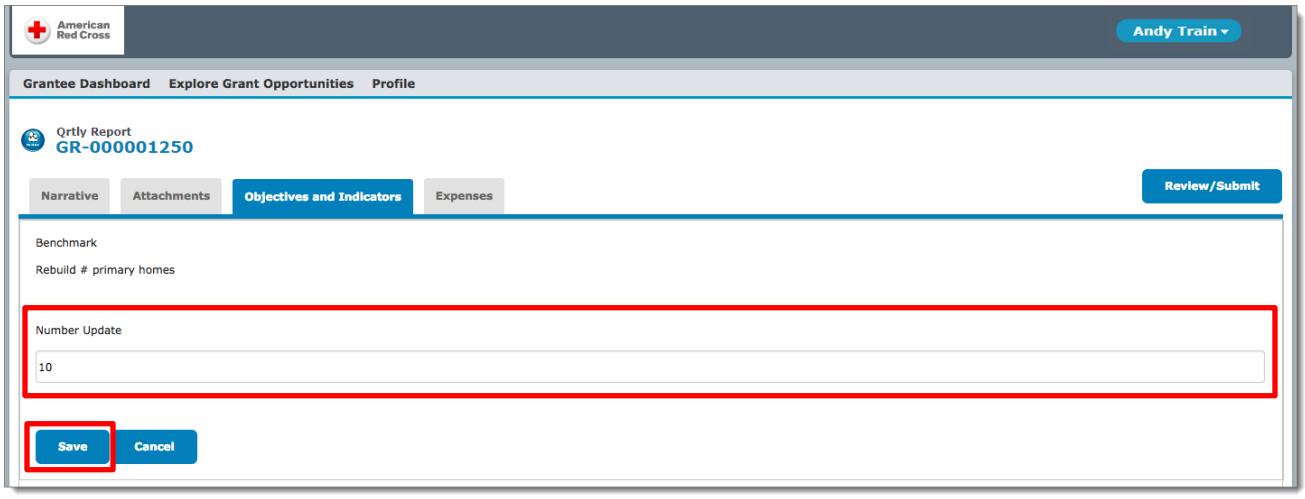
- Repeat the steps as needed to attach additional documents.
- Click *Save & Next*. (GMIS saves the report and takes you to its *Objectives & Indicators* tab. If you want to save the report and return to it later, you can click *Save* instead.)



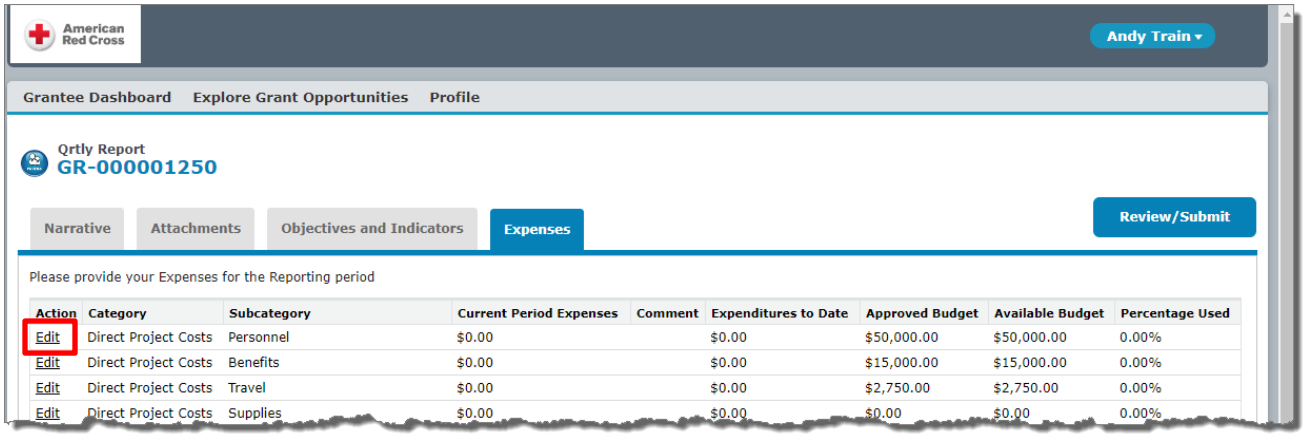
- Record your organization's progress against identified benchmarks.
  - Click *Edit* at a *Benchmark* listing. (The *Benchmark* listing becomes editable.)



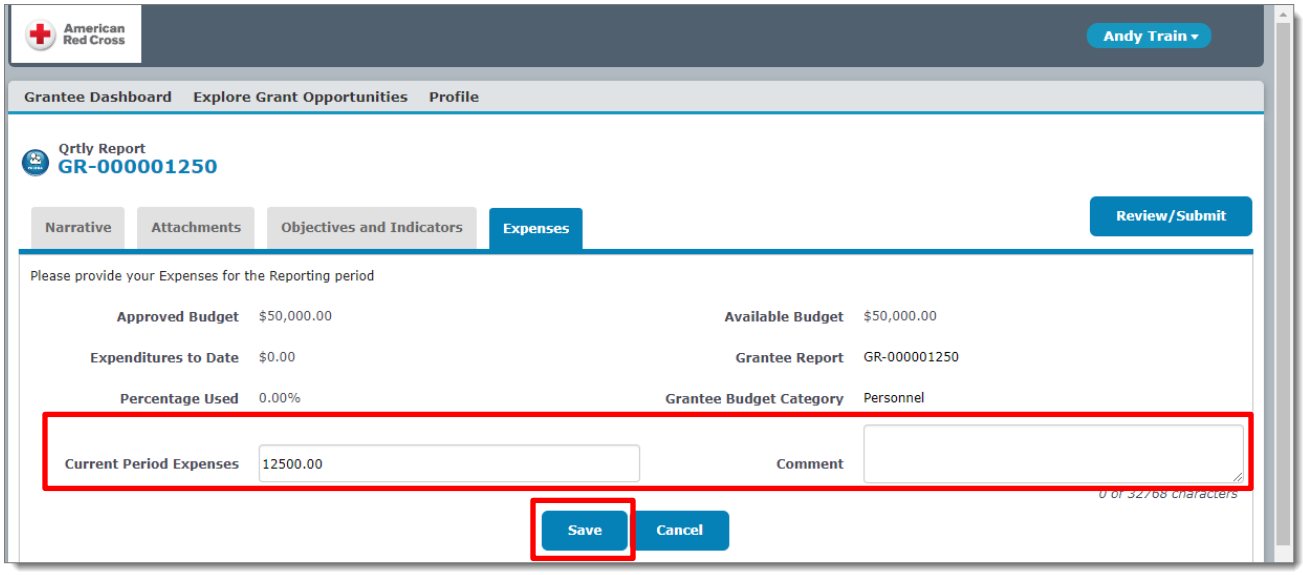
- Record your organization's progress against identified benchmarks. (cont.)
  - Record your progress on the *Benchmark* and click *Save*.
  - Repeat these steps for any additional benchmarks.



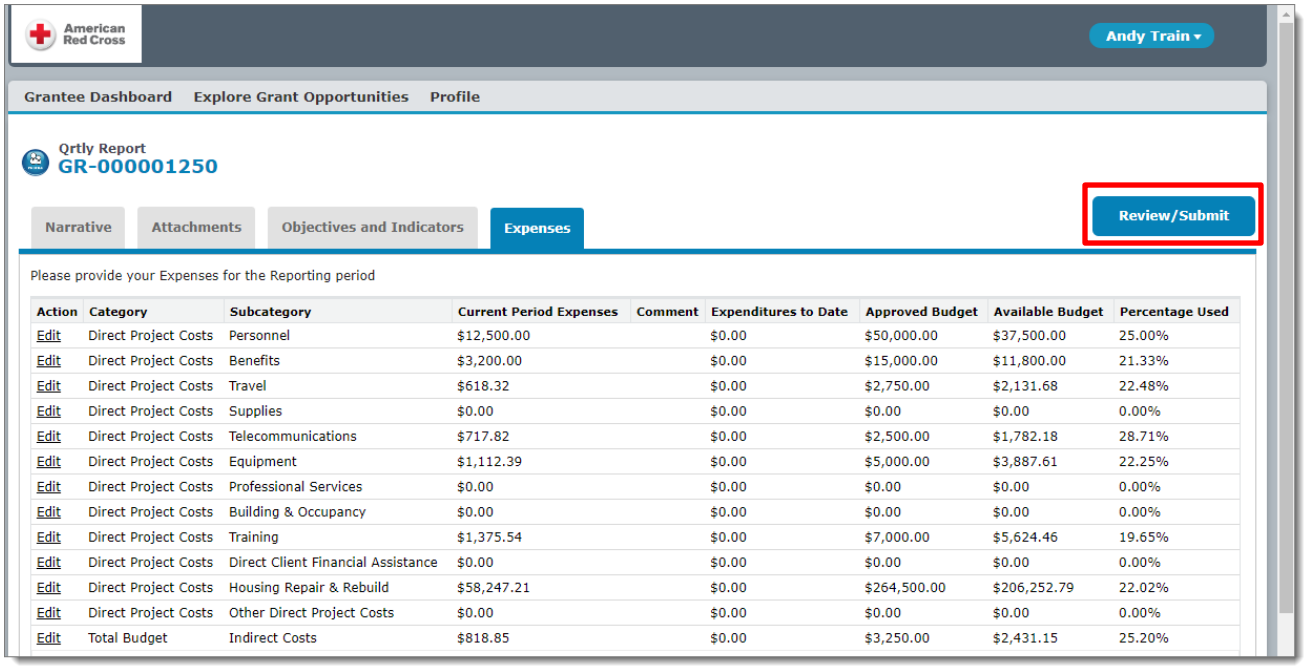
- Record the expenses for the reporting period.
  - Click the *Expenses* tab.
  - Click *Edit* at a relevant expense item. (GMIS displays a screen for updating that expense.)



- Record the expenses for the reporting period. (cont.)
  - Enter the *Current Period Expenses* for that expense item.
  - (if desired) Enter a *Comment*.
  - Click *Save*. (GMIS saves your entries and calculates the expense's *Available Budget* and *Percentage Used* values. If you make a mistake, you can click *Edit* again to update your entries.)



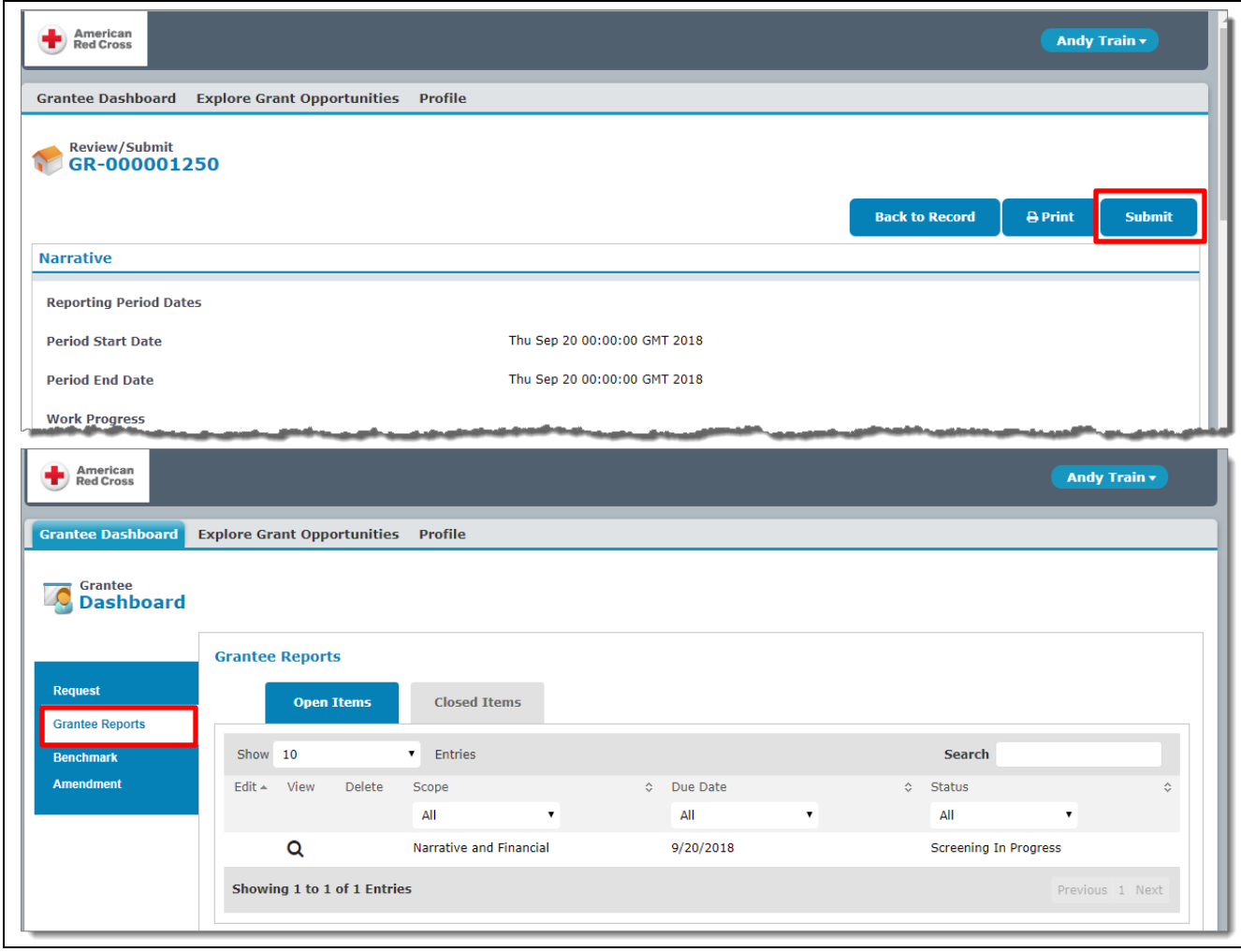
- Record the expenses for the reporting period. (cont.)
  - Repeat the steps to update all of the expenses relevant to the reporting period.
- Review the report.
  - Click *Review/Submit*. (GMIS displays the entire grant application on a single screen in read-only mode.)



Action	Category	Subcategory	Current Period Expenses	Comment	Expenditures to Date	Approved Budget	Available Budget	Percentage Used
Edit	Direct Project Costs	Personnel	$12,500.00		$0.00	$50,000.00	$37,500.00	25.00%
Edit	Direct Project Costs	Benefits	$3,200.00		$0.00	$15,000.00	$11,800.00	21.33%
Edit	Direct Project Costs	Travel	$618.32		$0.00	$2,750.00	$2,131.68	22.48%
Edit	Direct Project Costs	Supplies	$0.00		$0.00	$0.00	$0.00	0.00%
Edit	Direct Project Costs	Telecommunications	$717.82		$0.00	$2,500.00	$1,782.18	28.71%
Edit	Direct Project Costs	Equipment	$1,112.39		$0.00	$5,000.00	$3,887.61	22.25%
Edit	Direct Project Costs	Professional Services	$0.00		$0.00	$0.00	$0.00	0.00%
Edit	Direct Project Costs	Building & Occupancy	$0.00		$0.00	$0.00	$0.00	0.00%
Edit	Direct Project Costs	Training	$1,375.54		$0.00	$7,000.00	$5,624.46	19.65%
Edit	Direct Project Costs	Direct Client Financial Assistance	$0.00		$0.00	$0.00	$0.00	0.00%
Edit	Direct Project Costs	Housing Repair & Rebuild	$58,247.21		$0.00	$264,500.00	$206,252.79	22.02%
Edit	Direct Project Costs	Other Direct Project Costs	$0.00		$0.00	$0.00	$0.00	0.00%
Edit	Total Budget	Indirect Costs	$818.85		$0.00	$3,250.00	$2,431.15	25.20%

- Review the report. (cont.)
  - Scroll down to review the entire report.
- If you need to make any updates:
  - Click *Back to Record* to return to the editable view of the report;
  - Make and save the update(s); and
  - Click *Review/Submit* to review your updates.
- (if desired) Click *Print* to print the completed report before sumbitting it.
- Submit the report.

- Click *Submit* and then click *OK* at the *Are you sure you want to submit? You will not be able to edit this form once it is submitted.* message.(GMIS submits your report to Red Cross Grant Team and takes you to the *Request* section of the *Grantee Dashboard*. You can view a submitted report at the dashboard's *Grantee Reports* section.)



Amending an Awarded Grant

Overview

While working to meet a grant's objectives, a Grantee may realize that they need to request an amendment. For example, while compiling a grantee report, an organization may indicate that it needs more time to meet its objectives than was recorded in their grant application. A process is in place for Grantees to follow, should such a situation arise.

The process always begins with communication between an organization and its Grants Manager, and written approval from the Red Cross Grant Team for the organization to create a grant amendment. An organization should not begin the process of creating a grant amendment in GMIS until they have obtained written approval to do so.

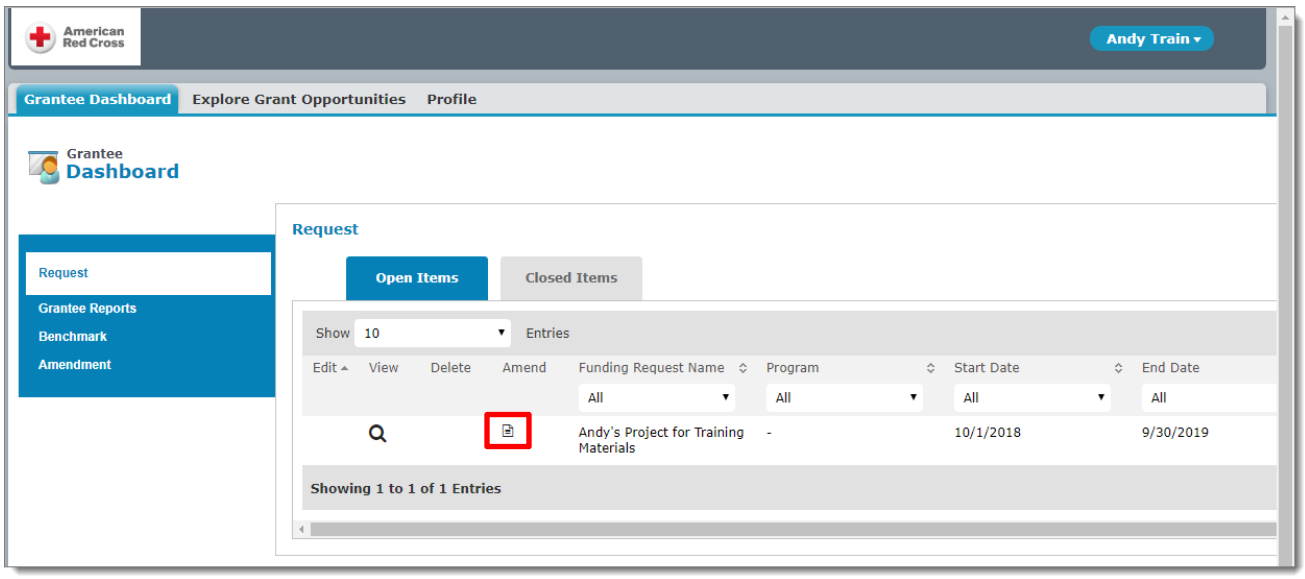
Summary of Steps

To amend an awarded grant:

- Consult with your Grants Manager;
- Receive written approval from the Red Cross Grant Team to create a grant amendment;
- Log into GMIS;
- Click the *Amend* icon at the grant application's listing, and then click *OK* at the *Are you sure you want to create this record?* message (GMIS displays the *Amendment* screen);
- Enter the amendment information; and
- Save, review, and submit the amendment.

Detailed Steps

- Log into GMIS. (For details, see the *Logging In* section above.)
- Click the *Amend* icon at the grant application's listing, and then click *OK* at the *Are you sure you want to create this record?* message. (GMIS displays the *Amendment* screen.)



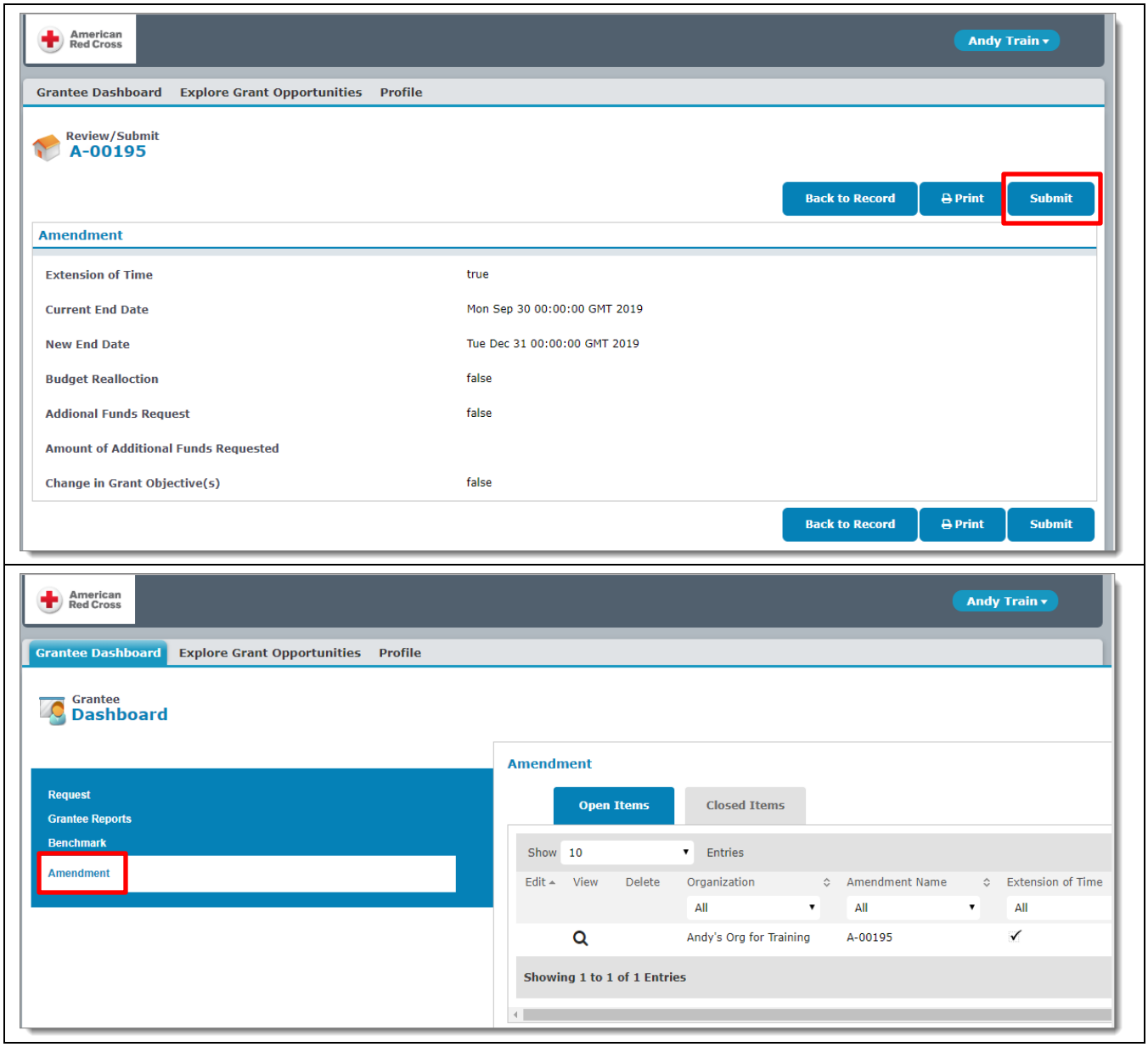
- Enter the amendment information.
  - Click *Yes* at the relevant amendment type(s). (They each default to *No*, but the *Yes* option is available to the left of the *X* for each; see the screen shot immediately below. After you click *Yes*, the button changes to a green color with *Yes* visible instead of *No*. If you make a mistake, you can click *No* to go back to the default setting.)

- Enter the amendment information. (cont.)
  - Enter relevant additional data.

- (after entering all of the needed information) Click *Save*. (GMIS saves the amendment.)

- Review the amendment.
  - Click *Review/Submit*. (GMIS displays the amendment in read-only mode.)

- Review the amendment. (cont.)
  - Review the amendment's information.
- If you need to make any updates:
  - Click *Back to Record* to return to the editable view of the amendment;
  - Make and save the update(s); and
  - Click *Review/Submit* to review your updates.
- (if desired) Click *Print* to print the amendment before sumbitting it.
- Submit the amendment.
  - Click *Submit* and then click *OK* at the *Are you sure you want to submit? You will not be able to edit this form once it is submitted.* message.(GMIS submits your amendment to Red Cross Grant Team and lists it at the *Amendment* section of the GMIS Applicant Portal.)


American Red Cross
Andy Train
Grantee Dashboard
Explore Grant Opportunities
Profile
Review/Submit
A-00195
Back to Record
Print
Submit
Amendment
Extension of Time
true
Current End Date
Mon Sep 30 00:00:00 GMT 2019
New End Date
Tue Dec 31 00:00:00 GMT 2019
Budget Reallocation
false
Addional Funds Request
false
Amount of Additional Funds Requested
Change in Grant Objective(s)
false
Back to Record
Print
Submit
American Red Cross
Andy Train
Grantee Dashboard
Explore Grant Opportunities
Profile
Grantee
Dashboard
Request
Grantee Reports
Benchmark
Amendment
Amendment
Open Items
Closed Items
Show 10 Entries
Edit
View
Delete
Organization
Amendment Name
Extension of Time
All
All
All
Andy's Org for Training
A-00195
Showing 1 to 1 of 1 Entries