

EGMS New User Training – 6/10/24

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[This recorded training](#) provides an overview of the Educational Grants Management System (EGMS), such as general navigation, adding additional users, completing applications, and payment requests.

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00:02:00	Logging in and using filters
00:03:40	Task list
00:04:50	Toolbars and general navigation
00:08:59	Organization Profile
00:15:22	Organization administrators: adding new users and user role descriptions
00:19:14	Organization Profile information and Programs of Interest
00:22:22	General assurances
00:26:55	Opportunities and how to find them
00:27:46	Types of grants (competitive, formula, directed) and naming conventions
00:29:39	Applications and Form Package information
00:36:11	Qualifying, pre-applications and applications, collaborating on an application
00:48:53	Creation of an application task and beginning the application
00:51:08	Finding your application
00:53:11	Adding a peer reviewer on an application
00:58:11	Completing the budget tab within applications
01:03:01	Staff Assignments tab within an application
01:04:45	Forms and Files tab within an application
01:14:48	How to find an application as an application owner
01:16:15	How to switch the application owner
01:18:00	Submitting an application and clearing error messages
01:20:11	System emails through the Collab tab
01:21:30	Revising an application (OSPI-initiated)
01:27:57	Viewing submitted records and history snapshots
01:36:40	Post-award actions: amendments
01:39:30	Terms tab, payment request schedule, and progress report schedule
01:41:08	Forms and Files tab, uploading documents



Time Stamp in Video	Topics Covered
01:41:45	Applications versus awards
01:44:17	Finding amendments, completing budget revisions, deleting amendments
01:55:31	Completing OSPI-initiated amendment requests (funding increase)
02:02:55	How to find and complete progress reports, with and without a task notification
02:11:51	Payment requests
02:22:43	Revising a payment request up until the due date