

EGMS User Access Guide

Pre-Application

The user who creates the pre-application becomes the owner. Only the owner can submit the pre-application. The owner can assign any organization user as the peer reviewer.

Actions	Which users can do the action?
Creating the Pre-Application	Primary users, Secondary users, School users (based on announcement setting and if the record is created for schools)
Viewing the Pre-Application	Primary users, Secondary users, School users (if record is created for schools)
Editing the Pre-Application	Primary users, Secondary users, School users (if record is created for schools)
Submitting the Pre-Application to Grantor	Primary users (as record owner), Secondary users (as record owner), School users (as record owner)
Peer-Reviewing the Pre-Application	Primary users, Secondary users, and School users (if record is created for schools)
Revising the Pre-Application (if OSPI sends it back)	Primary users (as record owner or peer reviewer with edit access), Secondary users (as record owner or peer reviewer with edit access), School users (as record owner or peer reviewer, and if record is created for schools)

Application Actions

Any organization user can create an application. The user who creates the application becomes the owner. Only the owner can submit the application. The owner can assign any organization user as a peer reviewer.

Actions	Which users can do the action?
Creating the Application	Primary users, Secondary users, School users (based on announcement setting and if the record is created for schools)
Viewing the Application	Primary users, Secondary users, School users (if record is created for schools)
Editing the Application	Primary users (as record owner or as peer reviewer with edit access), Secondary users (as record owner or as peer reviewer with edit access), School users (as record



Actions	Which users can do the action?
	owner or as peer reviewer with edit access, and if record is created for schools)
Submitting the Application to Grantor	Primary users (as record owner), and Secondary users (as record owner)
Peer-Reviewing the Application	Primary users, Secondary users, and School users (if record is created for schools)
Revising the Application (if OSPI sends back)	Primary users (as record owner or peer reviewer with edit access), Secondary users (as record owner or peer reviewer with edit access), School users (as record owner or peer reviewer, and if record is created for schools)

OSPI Initiated Post-Award Amendment

Amendments initiated by OSPI are sent to all users on the organization side. Notifications and tasks are created based on Programs of Interest.

Actions	Which users can do the action?
Viewing the OSPI initiated Post-Award Amendment	Primary users, Secondary users, School users (based on announcement setting and if the record is created for schools)
Receiving the pending task when the Amendment is sent to reimbursement	Primary users, Secondary users, School users (if record is created for schools)
Editing the OSPI initiated Post-Award Amendment	Primary users (with Program of Interest), Secondary users (with Program of Interest), School users (with Program of Interest and if record is created for schools)
Submitting the Post-Award Amendment to Grantor	Primary users (as record owner), and School users (if the record is created for schools)

Grantee Initiated Post-Award Amendment

Any organization user can initiate an amendment request for scope of work and budget redirection. Any organization user can edit the amendment request.

Actions	Which users can do the action?
Creating a Post-Award Amendment	Primary users, Secondary users, School users (if the record is created for schools)

Actions	Which users can do the action?
Viewing the Post-Award Amendment	Primary users, Secondary users, School users (if the record is created for schools)
Editing the Post-Award Amendment	Primary users, Secondary users, School users (if the record is created for schools)
Submitting the Post-Award Amendment to Grantor	Primary users, Secondary users, School users (if the record is created for schools)

Payments/Claims

The organization fiscal contact specified in the award receives the claims task and can complete and submit it. If the organization fiscal contact on the latest active award for the budget period is missing or inactive, the pending task is assigned to the Administrator for the organization.

Actions	Which users can do the action?
Receiving the pending task notification to work on the Claim/Payment Request	Primary users (as fiscal contact) and Secondary users (as fiscal contact)
Viewing the Payment Request	Primary users, Secondary users, School users (if the record is created for schools)
Editing the Payment Request	Primary users (as fiscal contact) and Secondary users (as fiscal contact)
Submitting the Payment Request to Grantor	Primary users (as fiscal contact) and Secondary users (as fiscal contact)

Progress Reports

All organization users with Programs of Interest get a task to work on a progress report.

Actions	Which users can do the action?
Receiving the pending task notification task to work on the Progress Report	Primary users (with Program of Interest), Secondary users (with Program of Interest), School users (if the record is created for schools and with program of interest)
Viewing the Progress Report	Primary users, Secondary users, School users (if the record is created for schools)
Editing the Progress Report	Primary users, Secondary users, School users (if the record is created for schools)
Submitting the Progress Report to Grantor	Primary users, Secondary users, School users (if the record is created for schools)
Revising the Progress Report (if sent back from OSPI)	Primary users, Secondary users, School users (if the record is created for schools)