



**Grants
Reform**

New York State Grants Gateway

Vendor User Guide

Version 2.0

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Table of Contents

1. Grantee Orientation	1
2. Grant Opportunity Portal	2
2.1. Grant Opportunity Portal – Home	2
2.2. Browse a list of Grant Opportunities.....	3
2.3. Search a list of Grant Opportunities	4
2.4. Download a Grant Opportunity.....	5
2.5. Sign-up to be notified of upcoming Grant Opportunities.....	7
2.6. Update Notification Preferences.....	9
3. Registration.....	11
3.1. Learn How to Become a Registered User	11
3.2. Logging into the Grants Gateway.....	13
4. Delegated Administrator Tutorial	15
4.1. Grantee Roles	15
4.2. Creating User Accounts	16
4.3. Modifying User Accounts.....	19
4.4. Inactivating User Accounts.....	20
4.5. Managing Roles	21
5. Document Vault Tutorial	23
5.1. Grantee Organization Information	23
5.2. Document Vault.....	26
5.3. Prequalification.....	32
5.4. Required Documents Expiration.....	40
6. Online Application	44
6.1. Search for Grants.....	44
6.2. Create an Online Application for a Specific Grant.....	48
6.3. Retrieve Application	67
6.4. Cancel Application	69
6.5. Add/Edit People tool.....	71
6.6. Submit an Online Application	72



7. Contract Development Process.....	77
7.1. Editing Contract Information.....	77
8. Contract Approval Process	84
9. Notes Tool	91
10. Add/Edit People Tool.....	95
11. Search Contracts Tool	96
12. Tasks Tool.....	98
13. Understanding the Period Schedule Report	100
14. Tools Available	103
15. Helpful Information/Links	105

1. Grantee Orientation

Welcome to the New York State (NYS) Grants Gateway Vendor User Guide. The purpose of this document is to orient new users to all that the Grants Gateway has to offer. Several key pieces of functionality are available.

The Grant Opportunity Portal is online and available to the public, providing a one-stop shop for anyone interested in locating grant funding opportunities with New York State agencies.

The Grantee Document Vault is also available, allowing existing grantees and potential applicants to store key organizational information in a single secure online location for use by all State agencies. In order to use the Document Vault, a grantee must register as a user on the system and provide information on a Delegated Administrator who will manage their user account. This requires submission of a [Registration form](#) and accompanying organizational diagram. Note that your Registration form must be signed, notarized and mailed to Gateway Administrators. Plan accordingly to avoid potential delays in applying for upcoming grant opportunities.

Additional functionality includes the ability to apply for certain grants online through the Grants Gateway, manage contract development of awarded applications, and electronically sign a contract. Grantees must be registered in the Grants Gateway to apply for an opportunity, and not-for-profits must be prequalified.

For additional information see the Grants Reform Website at www.grantsreform.ny.gov.

2. Grant Opportunity Portal

The Grant Opportunity Portal provides a one-stop shop for anyone interested in locating grant funding opportunities with State agencies. The following pages provide detailed information on how to use the functionality within the Grant Opportunity Portal.

- Grant Opportunity Portal Home
- Browse a list of Grant Opportunities
- Search for specific Grant Opportunities
- Download a Grant Opportunity
- Sign-up to be notified of upcoming Grant Opportunities
- Update Notification Preferences
- Learn how to become a Registered User
- Logging into the Grants Gateway

2.1. Grant Opportunity Portal – Home

As a new user, the place you will want to start is the Grant Opportunity Portal, which is open to the public and does not require you to be a registered user. The Portal will allow you to browse, search and sign-up to receive notifications regarding State agency grant funding opportunities.

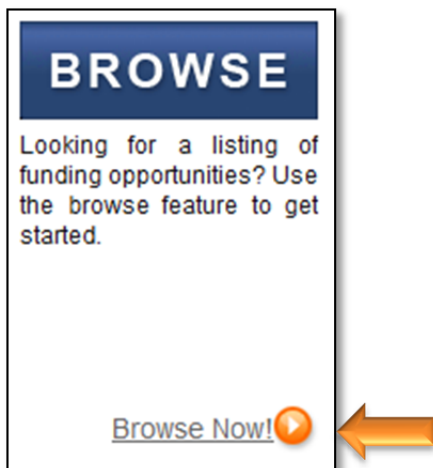


Browse a list of Grant Opportunities

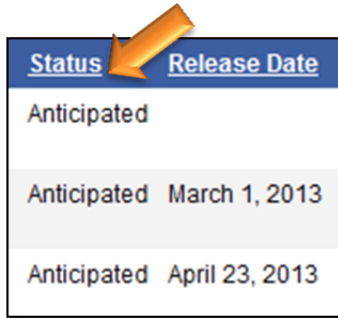
Browsing for opportunities in the Grant Opportunity Portal is a quick and easy way to see what types of available and anticipated funding opportunities have been posted by State agencies.

Browse by doing the following:

- 2.1.1. Click the **Browse Now!** Link on the portal home page.



2.1.2. Click on a column header link, such as **Status**, to sort the list by that column.



<u>Status</u>	<u>Release Date</u>
Anticipated	
Anticipated	March 1, 2013
Anticipated	April 23, 2013

2.1.3. Click the **Grant Opportunity** name to view the Grant Opportunity Profile (see 2.4. Download a Grant Opportunity in this Section for further details).

Note: Opportunities with a Status of “Anticipated” will not have a link.

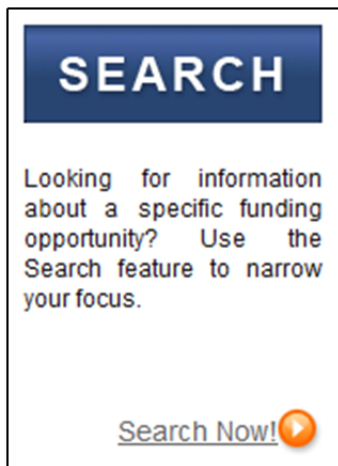
2.1.4. Click the **Browse for Opportunities** link on any page to return to the **Browse for Opportunities** page.

2.2. Search a list of Grant Opportunities

It is also possible to search the Grant Opportunities Portal to locate specific opportunities or opportunities posted by specific funding agencies.

Search by doing the following:

2.2.1. Click the **Search Now!** Link on the portal home page.



2.2.2. Enter information in the search fields to narrow your results or click directly on search to see all opportunities in the Grants Gateway.

Search by Grant Opportunity	<input type="text"/>
Search by Due Date	From: <input type="text"/> To: <input type="text"/>
Search by Release Date	From: <input type="text"/> To: <input type="text"/>
Search by Status	-- All -- <input type="button" value="v"/>
Search by Eligibility	-- All -- <input type="button" value="v"/>
Search by Funding Agency	-- All -- <input type="button" value="v"/>
Search by Service Area	-- All -- <input type="button" value="v"/>

Select the **SEARCH** button.



2.2.3. Click the **Grant Opportunity** name to view the Grant Opportunity Profile (see 2.4. Download a Grant Opportunity in this Section for further details).

Note: Opportunities with a Status of “Anticipated” will not have a link.

2.2.4. Click the **Search for Opportunities** link on any page to return to the **Search for Opportunities** page.

2.3. Download a Grant Opportunity

The Grant Opportunity Portal allows grantees to download PDF versions of available Grant Opportunities or view a link to an Opportunity.

Download a Grant Opportunity by doing the following:

2.3.1. Search or browse for an “Available” opportunity.

2.3.2. Click the **Grant Opportunity** name link to view the Grant Opportunity Profile.

Funding Agency	Grant Opportunity	Status	Release Date	Eligibility	Due Date
Department of Environmental Conservation	Technical Assistance Grant	Available	March 8, 2006	Not-For-Profit	
Governor's Traffic Safety Committee 	Child Passenger Safety Incentive Grants (CPS) 2014	Available	April 22, 2013	Governmental Entity, Not-For-Profit, Tribal Organization	May 15, 2013
Governor's Traffic Safety Committee	Highway Safety Grant (HS-1) 2014	Available	April 22, 2013	Governmental Entity, Not-For-Profit, Tribal Organization	May 15, 2013

2.3.3. Select the **DOWNLOAD GRANT OPPORTUNITY** button.

Grant Opportunity Profile

Grant Opportunity ID
DMV01-CPS-2013

Agency
Governor's Traffic Safety Committee

Grant Opportunity
Child Passenger Safety Incentive Grants (CPS) 2014

Contact Name
Jane Doe

Contact Email
jane.doe@dmv.ny.gov

Solicitation Profile

Full Announcement Details

Release Date Monday, April 22, 2013

Applications Due (Funding Round (FR) / Date / Time)
• FR 1 / May 15, 2013 / 04:00 PM EST

Bidder's Conference(s)/Application Workshop(s)
None available

Anticipated Award Date Tuesday, October 01, 2013

Anticipated Initial Contract Length 1 Years

Total Funding Available

Anticipated Amount of Award(s)


Letter of Intent Not Required

Letter of Intent Due

Eligible Applicants Not-For-Profit, Governmental Entity, Tribal Organization

Target Population(s)

Service Area(s) Public Safety Supports



DOWNLOAD GRANT OPPORTUNITY

2.3.4. The PDF file will open in a web browser window.

2.3.5. You can now save or print the PDF file on your computer.

2.3.6. Print by selecting the print icon in the upper left hand corner and follow the dialogue boxes.



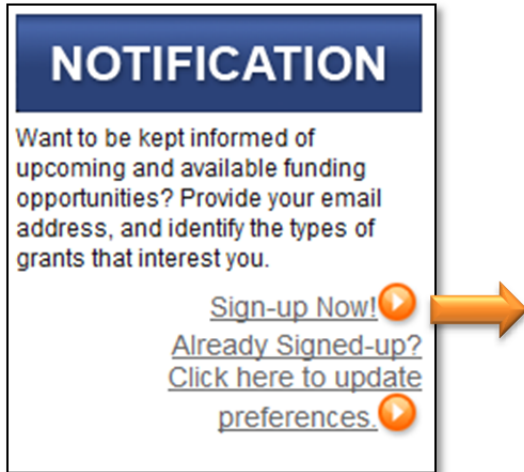
2.3.7. Save by selecting the "save as" and follow the dialogue boxes.

2.3.8. Be sure to read the information on the Grant Opportunity Profile page as well as the content of the PDF for information on eligibility, submission procedures and due dates.

2.4. Sign-up to be notified of upcoming Grant Opportunities

If you sign-up for notifications, the Grant Opportunity Portal can keep you automatically informed about opportunities you might be interested in.

Receive notifications by doing the following:



2.4.1. Click the **Sign-up Now!** Link on the portal home page.

2.4.2. Enter your information in the required fields.

NOTE: Required fields are marked with an *.



First Name	<input type="text"/>	*
Last Name	<input type="text"/>	*
Organization	<input type="text"/>	*
Email	<input type="text"/>	*
Confirm Email	<input type="text"/>	*

2.4.3. Click the check box next to your area or areas of preference.

<input type="checkbox"/> Select/De-Select All	
<input type="checkbox"/> Health and Human Services	<input type="checkbox"/> Non Health and Human Services
<input type="checkbox"/> - Education Supports	<input type="checkbox"/> - Agricultural Supports
<input type="checkbox"/> - Family Supports	<input type="checkbox"/> - Environmental Supports
<input type="checkbox"/> - Health Services	<input type="checkbox"/> - Public Transportation Services
<input type="checkbox"/> - Housing and Shelter Services	<input type="checkbox"/> - Public Safety Supports
<input type="checkbox"/> - Justice Services	<input type="checkbox"/> - Government Supports
<input type="checkbox"/> - Workforce Development	




2.4.4. Select the **SIGN-UP** button.

<input type="button" value="SIGN-UP"/>	<input type="button" value="CANCEL"/>
--	---------------------------------------



2.4.5. If your registration was completed successfully, you will see the message below on the screen. You will also receive a registration email titled “Grant Opportunity Portal Notification”.

 **Sign-Up Successful!**

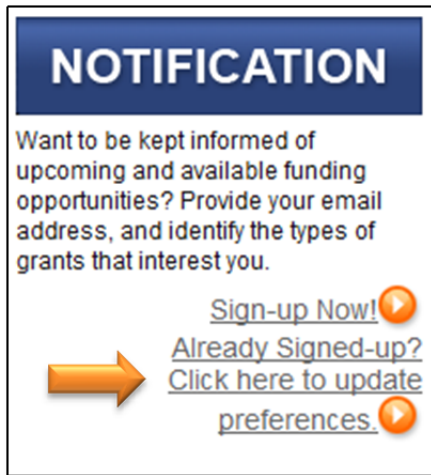
Congratulations, you are now signed-up to receive notifications on new funding opportunities based on the preferences you entered.

[RETURN TO THE GRANT OPPORTUNITY PORTAL HOME](#)

2.5. Update Notification Preferences

You may at some point want to add or remove preferences from your notifications. This is a simple task in the Grant Opportunity Portal.

- 2.5.1. Click the **Already Signed-up? Click here to update preferences** link on the portal home page.



- 2.5.2. Enter your email address and select the **LOGIN** button.



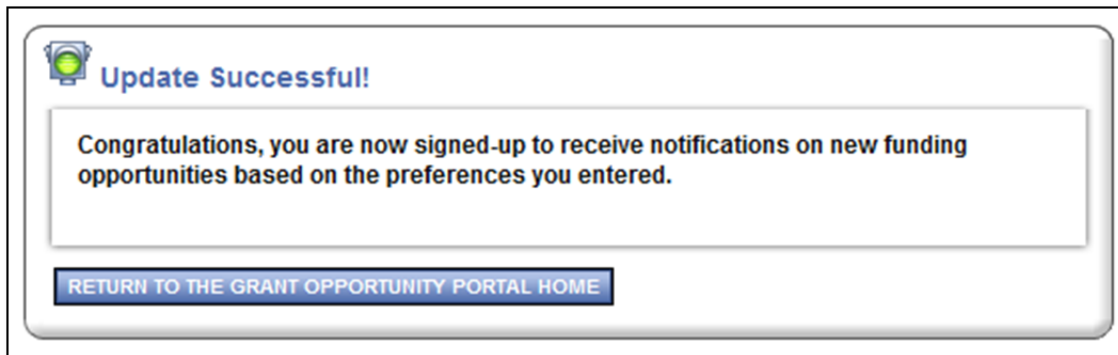
2.5.3. Make the changes to your preferences.

<input type="checkbox"/> Select/De-Select All	
<input type="checkbox"/> Health and Human Services	<input type="checkbox"/> Non Health and Human Services
<input type="checkbox"/> - Education Supports	<input type="checkbox"/> - Agricultural Supports
<input type="checkbox"/> - Family Supports	<input type="checkbox"/> - Environmental Supports
<input type="checkbox"/> - Health Services	<input type="checkbox"/> - Public Transportation Services
<input type="checkbox"/> - Housing and Shelter Services	<input type="checkbox"/> - Public Safety Supports
<input type="checkbox"/> - Justice Services	<input checked="" type="checkbox"/> - Government Supports
<input type="checkbox"/> - Workforce Development	

2.5.4. Select the **UPDATE PREFERENCES** button.



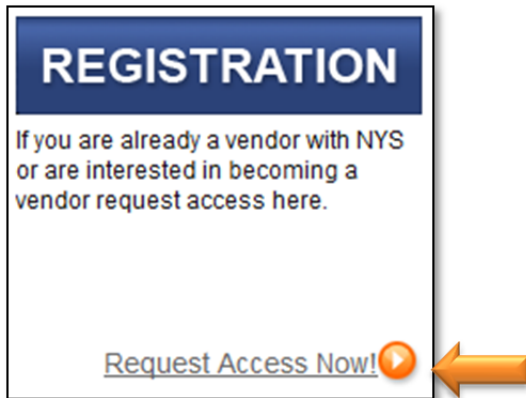
2.5.5. The message below will appear on the screen.



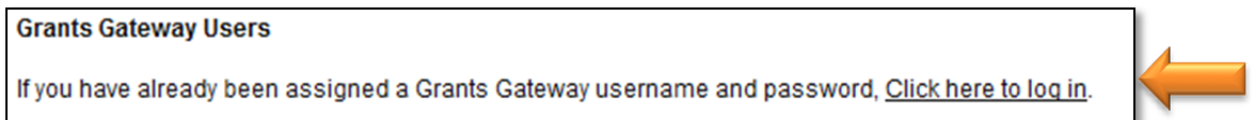
3. Registration

3.1. Learn How to Become a Registered User

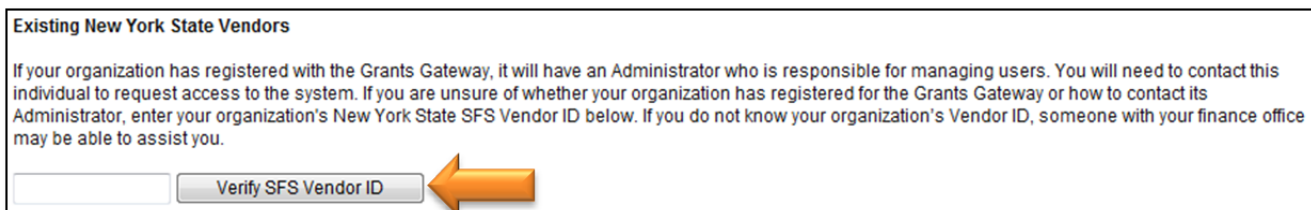
3.1.1. Click the **Request Access Now!** Link on the portal home page.



3.1.2. If you have already received a Grants Gateway username and password via email click the **Click here to login** link. (See 3.2 Logging into the Grants Gateway) in this section for further information.



3.1.3. If your organization currently or previously has had a contract with NYS then the organization may be registered with the Grants Gateway. To find out enter your organization's 10 digit SFS Vendor ID and select the **Verify SFS Vendor ID** button. If you don't know your SFS Vendor ID, check with your finance office.





Grants Reform

If your organization has registered you will see your Organization Name and the name and email address of the person who has been assigned as the Grantee Delegated Administrator. Click on the **Email** link to contact the Grantee Delegated Administrator and request that they give you access to the Grants Gateway.

100099999

Organization Name	Delegated Admin
Vivian's Dance	Vivian lee Email: audrey.dean@budget.ny.gov

Contact the Delegated Administrator for your organization to request access.

If your organization is not listed, download and complete the [Registration Form](#).

If your Organization Name is listed, but the Grantee Delegated Administrator is not then you should click on the **Registration Form** link. Download and complete the Registration Form following the instructions included with the form.

1000000120

Organization Name	Delegated Admin
DB Enterprises	

Your organization has not established a Delegated Administrator. Download and complete the [Registration Form](#).

If your organization is not listed, download and complete the [Registration Form](#).

3.1.4. If your organization has not done business with NYS click on both the **Substitute W-9 Form** and **Registration Form** links. Download and complete both forms, follow the instructions included with the Registration Form.

All Other Vendors

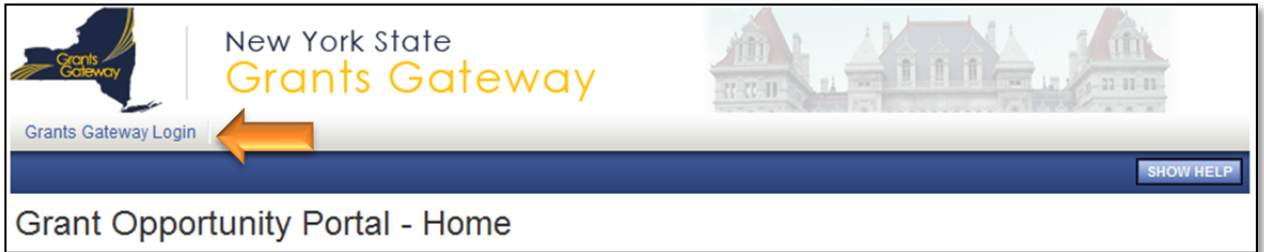
If your organization has not previously done business with New York State, you will need to:

1. Download and complete the [Substitute W-9 Form](#) to obtain a NYS SFS Vendor ID.
2. Download and complete the Grants Gateway [Registration Form](#).
3. Follow instructions on registration form.

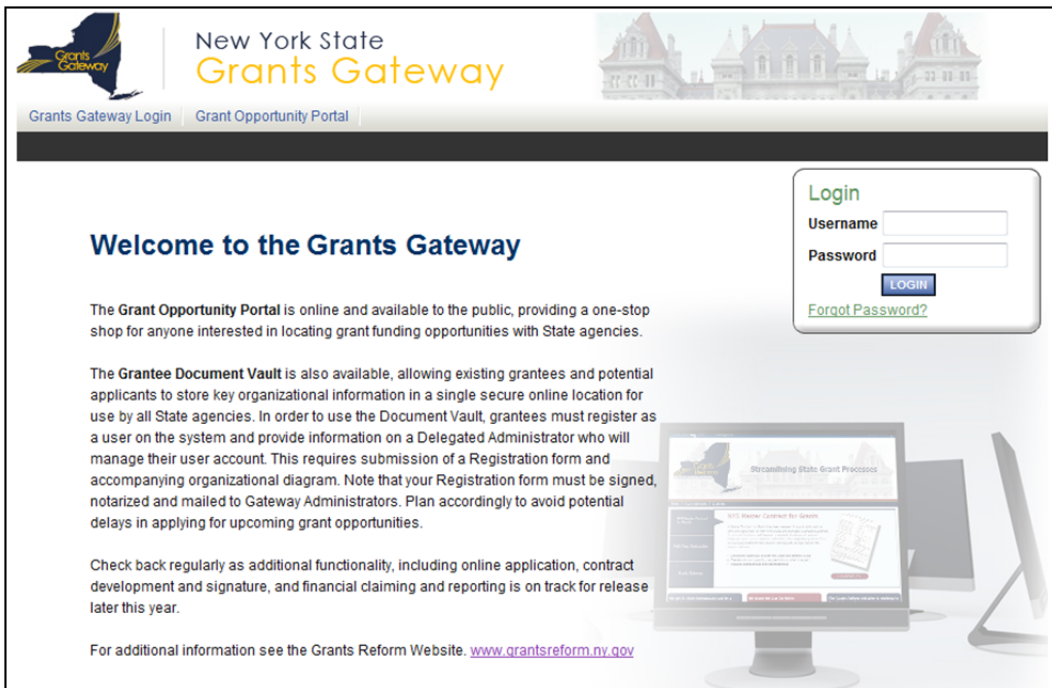
Once your registration has been processed the individuals that were identified as Delegated Administrators will receive two emails, one with their username and one with their password. (See 3.2 Logging into the Grants Gateway in this section for further information.)

3.2. Logging into the Grants Gateway

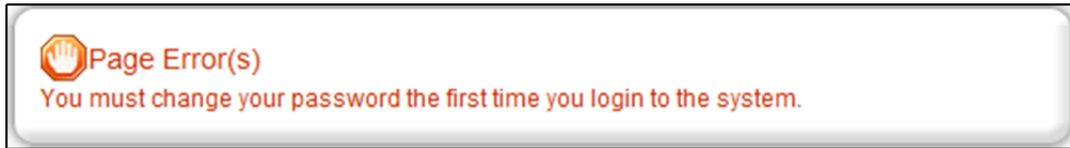
3.2.1. To log in to the Grants Gateway click the **Grants Gateway Login** link on the Grant Opportunity Portal Home page.



Enter your Username and Password on the front page of the Grants Gateway and click the **LOGIN** button.



3.2.2. The first time you login to the Grants Gateway you will be prompted to change your password.



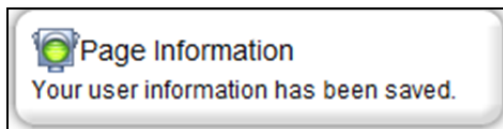
3.2.3. Enter your new Password. Enter your new Password a second time in the Confirm Password box to ensure that you have entered it correctly. Your new Password must consist of at least 8 characters/numbers. You must include at least 1 capital letter and at least 1 number.



3.2.4. Click the **SAVE** button on the menu tab.



3.2.5. You will get a "Page Information" confirmation after the save is complete.



4. Delegated Administrator Tutorial

Once your organization has registered, and the Delegated Administrator has received their username, logged-in, and updated their temporary password, they can begin to develop your organization's Gateway profile. This involves creating additional members (users) for your organization and making certain that its Document Vault is up to date.

4.1. Grantee Roles

4.1.1. **Delegated Administrator** – The Grantee Delegated Administrator is the Grantee Organization user responsible for performing user management tasks within the system. This includes but is not limited to creating and maintaining user accounts and ensuring that user accounts remain current. Activities for this role include but are not limited to:

- Creating User Accounts
- Maintaining User Accounts
- Inactivating User Accounts
- Creating, maintaining, and updating the Document Vault

4.1.2. **Grantee** – The Grantee role is the Grantee Organization user responsible for performing tasks related to applications, contracts and reporting. Activities for this role include but are not limited to:

- Initiate and complete applications
- Comply in a timely manner with Agency requests for information
- Initiate payment and modification requests
- Submit modification requests
- Initiate, complete and submit progress reports
- Creating, maintaining, and updating the Document Vault

4.1.3. **Grantee Contract Signatory** – The Grantee Contract Signatory role is the user authorized to review and sign contracts on behalf of the Grantee Organization. Activities for this role include but are not limited to:

- Initiate, complete and submit applications
- Sign contracts
- Initiate, complete and submit modification requests
- Initiate payment requests
- Initiate, edit and submit progress reports

4.1.4. **Grantee Payment Signatory** – The Grantee Payment Signatory role is the user authorized to review and submit payment requests on behalf of the Grantee Organization. Activities for this role include but are not limited to:

- Initiate and complete applications
- Initiate, complete and submit modification and payment requests
- Initiate, complete and submit progress reports

4.1.5. **Grantee System Administrator** – The Grantee System Administrator role is the user authorized to complete all the processes required of a Grantee user. Activities for this role include but are not limited to:

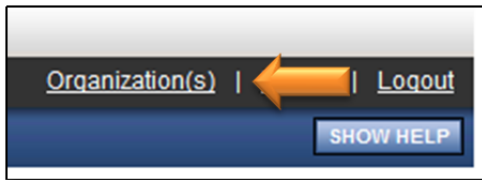
- Initiate, complete and submit applications
- Sign contracts
- Initiate, complete and submit modification and payment requests
- Initiate, complete and submit progress reports

4.1.6. **Grantee View Only** – The Grantee View Only role is the user authorized to view all information for the Grantee Organization. This role is assigned permission to view documents, reports and statuses.

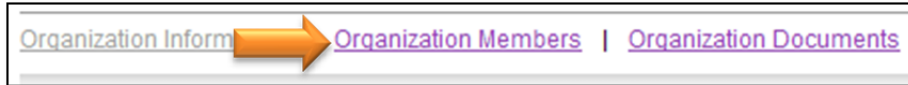
4.2. Creating User Accounts

Note: It is advisable that you develop a process within your organization for requesting and authorizing access to the Grants Gateway. You may want to develop a form for this purpose that contains an official signoff process. The method you choose for authenticating users being given access to the system is up to your organization, but it is strongly recommended that you have some type of written approval process.

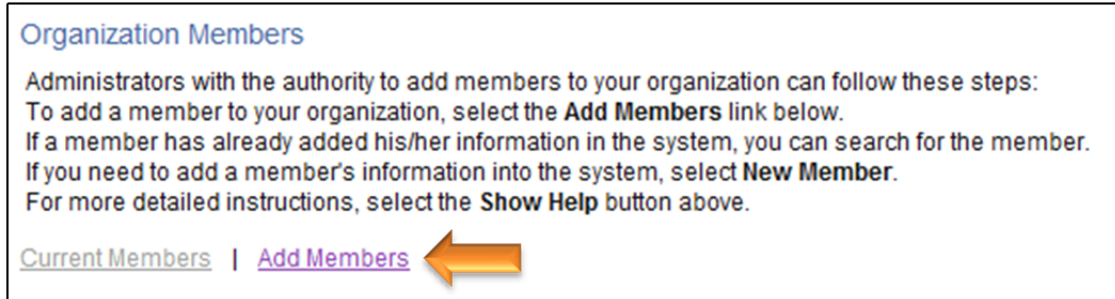
4.2.1. Click the **Organization(s)** link on the home page.



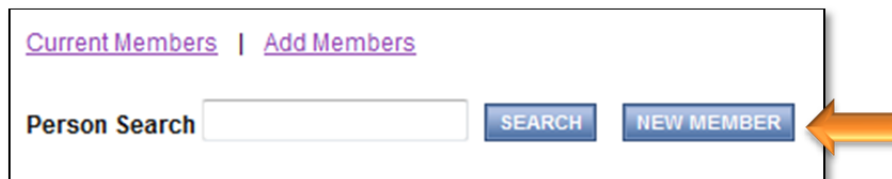
4.2.2. Click on the **Organization Members** link.



4.2.3. Click the **Add Members** link.



4.2.4. Select the **NEW MEMBER** button.



4.2.5. Complete all required fields on the page.

4.2.5.1. Please include Title for any User.

Name	Prefix	First	Middle	Last	Suffix
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>				
Email	<input type="text"/>				
Username	<input type="text"/>				
Date Active	<input type="text" value="5/6/2013"/>	Date Inactive			<input type="text"/>
Role	<input type="text"/>				

4.2.6. Select the appropriate role for the user you are adding.

Date Active	<input type="text" value="5/13/2013"/>	Date Inactive	<input type="text"/>
Role	<input type="text" value="Grantee"/> <ul style="list-style-type: none"> <input type="text" value="Grantee"/> <input type="text" value="Grantee Delegated Administrator"/> 		

4.2.7. Notice the contact information below. The address information will be “pre-populated” with the organization information. This information can be changed here or by the user in their Profile.

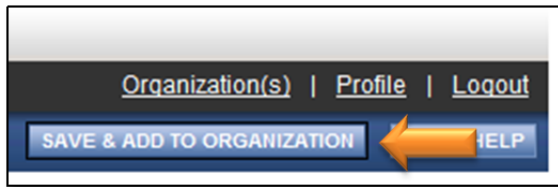
The fields below are populated with the Organization information by default. However, you may edit the information in any of the fields. This information may also be edited by the person you are creating the profile for from their Profile page.

Address	<input type="text" value="100 LADENTOWN RD"/>		
City	<input type="text" value="POMONA"/>	State	<input type="text" value="New York"/>
Zipcode	<input type="text" value="10970-2863"/>		
Phone #1	<input type="text" value="(123) 451-2345"/>	Phone #2	<input type="text"/>

4.2.8. The phone number of the new user is a required field.

Phone #1	<input type="text"/>
-----------------	----------------------

4.2.9. Select the **SAVE & ADD TO ORGANIZATION** button to complete the process.

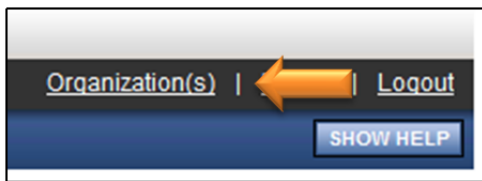


- 4.2.10. The new user will receive two separate emails from the Grants Gateway: One email will contain the username and the other will contain the password.

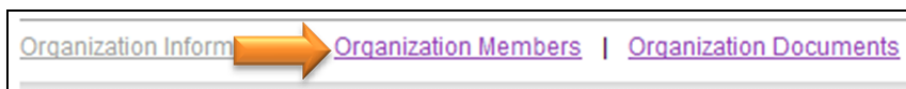
4.3. Modifying User Accounts

Note: All users in the system are able to update their profile information with the exception of their role. It is recommended that you do a periodic review of user accounts to ensure that the information within the system is accurate.

- 4.3.1. Click the **Organization(s)** link on the home page.



- 4.3.2. Click on the **Organization Members** link.



- 4.3.3. Current users (members) for the organization will be displayed. Click on the **user's name** link in the Person column.

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Sort By:

<input type="checkbox"/>	Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/>	Lee, Bruce	Grantee	5/14/2013 - <input type="text"/>		lee, Vivian 5/14/2013	lee, Vivian 5/14/2013
<input checked="" type="checkbox"/>	Lee, Robert		5/14/2013 - <input type="text"/>		lee, Vivian 5/14/2013	
<input checked="" type="checkbox"/>	lee, Vivian	Grantee Delegated Administrator	5/10/2013 - <input type="text"/>		Dean, Audrey 5/10/2013	

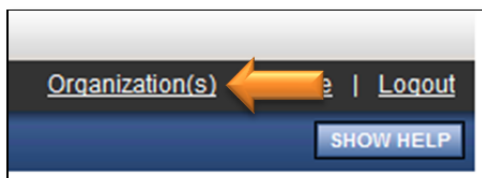
4.3.4. Modify the user's address/contact information as appropriate and click the **SAVE** button.

4.3.4.1. Do not change a user's role. Please see Section 4.5 of this document for information on managing roles.

4.4. Inactivating User Accounts

Inactivating user accounts is a critical part of the Delegated Administrator's responsibilities. It is imperative that any individual that leaves the employ of your organization be inactivated in the Grants Gateway as quickly as possible. The Grants Gateway is an Internet based system which means that any active user can access the system anytime from any computer. Until a user is inactivated they can enter the system and potentially delete and/or change your organization's information.

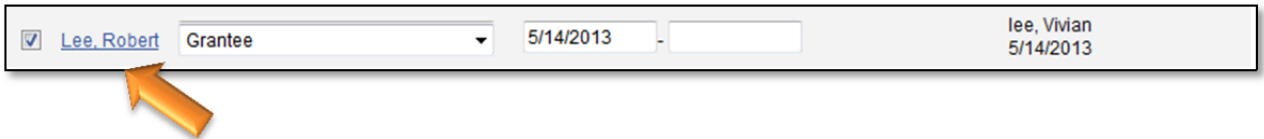
4.4.1. Click the **Organization(s)** link on the home page.



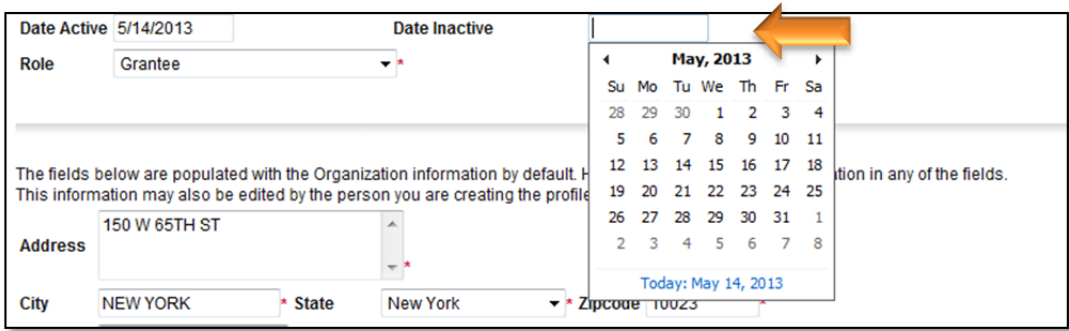
4.4.2. Click on the **Organization Members** link.



4.4.3. Current users (members) for the organization will be displayed. Click on the **user's name** link in the Person column.



4.4.4. Inactivate the user by selecting (or entering) a Date Inactive and click the **SAVE** button.



4.5. Managing Roles

4.5.1. Refer to section 4.1, Grantee Roles, of this Guide for a list of Grantee system roles and their responsibilities. In order to effectively use roles to manage your business on the Gateway, each role must be assigned separately. That is, it is advised that you do not change a user's role on the system.

4.5.2. Assign separate accounts for separate roles. For example, Mary Smith of Nonprofit XYZ, Inc. is registered on the Gateway initially as a Delegated Administrator. With this role she manages the Document Vault/NFP Prequalification Application. A new online grant opportunity has been posted that XYZ, Inc. wishes to apply for. Mary's role as Delegated Administrator will not allow her to create an application online. Mary should:

- Create a new User Profile for herself using the Add Member instructions outlined in Section 4.2, Creating User Accounts.
- Set her role to Grantee
- Log in with her new Grantee username and password
- Follow the instructions in Section 6, Online Application to create and complete an application for funding

4.5.3. Only an authorized Grantee contract Signatory or Grantee System Administrator may submit an online grant application. Mary will have to follow the same process outlined above to add an authorized user to the Organization who can submit applications on its behalf.







5. Document Vault Tutorial

The Document Vault is an online repository where you can store key organizational information in a single secure online location for use by all State agencies, replacing the current practice whereby you are repeatedly asked to provide the same document on a program-by-program, agency-by-agency basis.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Document Vault](#)

Organization Details

Instructions:
 Below is a list of required and additional forms and documents based on your organization's entity type.
 All required documents must be uploaded.
 The additional documents may be requested based on the opportunities you apply for.

Status	Page Name	Note	Created By	Last Modified By
Required Forms				
	Organization Capacity			
	Organization Compliance			
	Organization Integrity			
	Service Descriptors			
	Service Capacity			
Not For Profit Required Documents				
	Certificate of Incorporation or Equivalent Document			

The Forms and Documents displayed will vary by organization type. Begin the process of uploading those documents which are most frequently requested by the State agencies with which you do business. Once they are available in the system, if a State agency requests one of these documents they should be directed to the Grants Gateway.

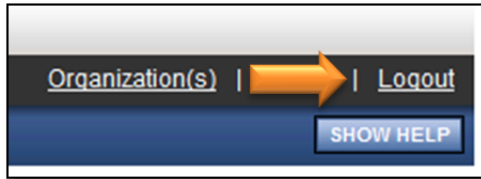
This section provides detailed information on populating your document vault and, if necessary submitting it to be reviewed for prequalification. Note: at this time prequalification is only required for not-for-profit organizations¹.

5.1. Grantee Organization Information

¹ **Some not-for-profit organizations may be exempted from Prequalification. See www.grantsreform.ny.gov/grantees for more information. For exempt not-for-profits, this step will be completed by Grants Reform at registration time.*

Before you can populate your Document Vault you must complete your Grantee Organization Information*.

5.1.1. Click the **Organization(s)** link on the home page.



5.1.2. On the Organization Information page there are a number of data elements that are imported from the Statewide Financial System (SFS). These data elements are grayed out and cannot be updated in the Grants Gateway. If this information is inaccurate you must change it in SFS (http://www.osc.state.ny.us/vendor_management/forms.htm) and it will be imported into the Grants Gateway the day after it is processed. Complete all of the required fields (indicated by *).

Organization - Capital Test Case

Please complete all the required fields below. Required fields are marked with an *.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#)

Organization Information

SFS Payee Name	<input type="text" value="SINGER PROPERTIES"/>			
Organization Legal Name	<input type="text" value="Capital Test Case"/>			
Organization DBA/Assumed Name	<input type="text"/>			
Payment Address	<input type="text" value="78 OLD LYME RD"/>			
City	<input type="text" value="CHAPPAQUA"/>	State	<input type="text" value="New York"/>	Zipcode
County	<input type="text"/>			<input type="text" value="10514-3814"/>
Phone Number	<input type="text"/>	Fax	<input type="text"/>	
Email	<input type="text" value="WmpfqxWL@aol.com"/>			
Website	<input type="text"/>			
SFS Vendor ID	<input type="text" value="1000000194"/>			
Entity Type	<input type="text" value="Not-For Profit"/>			

You will be asked to select the agency that your organization has done the most business with (greatest number of contracts) in the last 3 years. If your organization has not had a contract with a State agency select the one you anticipate contracting with.

Choose the state agency from the list below that your organization has had the most contracts with in the last three years. If you have never had a contract with any of these agencies, choose the state agency you anticipate contracting with in the future.

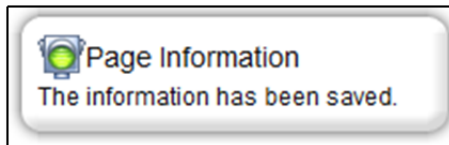
Office of Alcoholism & Substance Abuse Services



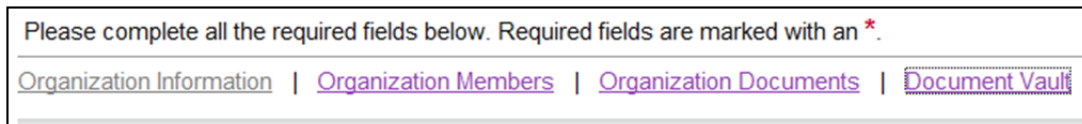
5.1.3. Click the **SAVE** button.



5.1.4. When the information is captured correctly, you will get the “Green Light” to move forward.








5.1.5. Once you have selected the agency the Document Vault tab will be available on the menu bar. Click the Document Vault link to begin the process of submitting information for State Agency review.



5.2. Document Vault

Each organization type has a unique set of forms and data sets it can populate. For the example below, the “Not-for-Profit-Profit” organization type was used, so required documents and forms for a Not-for-Profit are displayed. . (All organization types have a list of “Form Optional Documents” which can house any additional information you would like to upload).

5.2.1. Click each “Required Form” link and populate all required fields.


Status	Page Name	Note	Created By	Last Modified By
Required Forms				
	Organization Capacity			
	Organization Compliance			
	Organization Integrity			
	Service Descriptors			
	Service Capacity			

5.2.2. Populate all required information.

NOTE: Required fields are marked with an *.

ORGANIZATION CAPACITY

- Does organization have a system whereby one staff person is authorized to receive money and someone else is authorized to disburse money?*

Yes No 

- Does the organization have an automated payroll system?*

Yes No

- Does your organization use an electronic system for accounting?*







Yes No

5.2.3. Click the **SAVE** button after each document is completed.








5.2.4. After confirming that your document has been saved, scroll to the bottom of the screen and click the next document in the section.

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Organization Capacity		DelegatedAdministrator, Grantee 5/7/2013 1:39:55 PM	
	Organization Compliance			
	Organization Integrity			
	Service Descriptors			
	Service Capacity			

5.2.5. Repeat this process until each of the “Required Forms” is completed and saved.

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Organization Capacity		DelegatedAdministrator, Grantee 5/7/2013 1:39:55 PM	
	Organization Compliance		DelegatedAdministrator, Grantee 5/7/2013 1:45:33 PM	
	Organization Integrity		DelegatedAdministrator, Grantee 5/7/2013 1:46:13 PM	
	Service Descriptors		DelegatedAdministrator, Grantee 5/7/2013 1:46:41 PM	
	Service Capacity		DelegatedAdministrator, Grantee 5/7/2013 1:49:24 PM	DelegatedAdministrator, Grantee 5/7/2013 1:49:36 PM

5.2.6. When you are filling out the Service Descriptors form, please use the instructions below for Question #3.

- Work left to right when selecting items in the dropdowns. In the example below on the first line you would select Age and then Children.
- When you choose an item from the first dropdown (level 1) the second dropdown (level 2) will be populated with the appropriate associated values. This will continue until all pertinent selections have been populated.
- Note that not all items will have corresponding selections for the third and fourth levels. For example, in the first line below there are no corresponding values for levels 3 and 4.

3. Does your organization offer specialized programs for any of the following populations? Please choose all that apply.

Age	Children		
Court Involved	Criminal Justice Involved	Paroled	
Court Involved	Juvenile Justice Involved	Arrested	Released on own recognizance/Bail

5.2.7. When you are filling out the Service Capacity form, please use the instructions below.

If you choose **yes** to question number 1:

Choose one existing or previous contract you have had with a State agency for the service area you chose, and answer the following questions:

- Enter existing Contract/Grant ID number: Use State agency generated Contract ID
- Type: Enter the type of grant (Member Item, Competitive, Non-competitive)
- Funding Agency: Enter the State agency that held your contract
- Funding Source Type: Enter Funding Source (State, Federal, or Unknown)
- Funder Reference Name: Name of contact at the State agency that worked on your grant

- Funding Reference Title: Title of the funding reference
- Funding Reference Email: Email address of the funding reference
- Program Name/Description: Name or short description of the project funded
- Contract Start Date: Date the contract began
- Contract End Date: Date the contract ended
- Total Contract Amount: Dollar amount of the contract

Select Level 1*	Select Level 2*	Select Level 3*	Select Level 4 (if applicable)
Human Services	Service Area	Education Supports	Community Engagement

1. Does your organization currently have, or has it had in the past 5 years, contracts or grants to deliver services in the Service Area you chose above?*

Yes No

If yes:

Enter existing Contract/Grant ID number:	C012345
Grant Type:	Non-competitive
State Agency:	State Education Department
Funding source type:	State
State agency contact name:	John Smith
State agency contact title:	Independent Living Centers Manager
State agency contact phone number:	(518) 555-1212
State agency contact email address:	jsmith@mail.nysed.gov
Funded Program Name/Description:	Operation of an Independent Living Center
Contract start date:	10/01/2012
Contract end date:	09/30/2015
Total contract amount:	\$100,000.00

If you choose **no** to question number 1: you will be asked question number 2, which is:

Do key staff members employed by your organization have experience delivering the selected Service?

If you choose **yes** to question number 2:

You will be asked to identify that staff member and enter key information about them.

Select Level 1* Select Level 2* Select Level 3* Select Level 4 (if applicable)

Human Services Service Area Education Supports [Dropdown]

1. Does your organization currently have, or has it had in the past 5 years, contracts or grants to deliver services in the Service Area you chose above?* Yes No

2. Do key staff members employed by your organization have experience delivering the selected Service?*

If yes:

Staff Member Name:

Staff member title:

Staff member email address:

Staff member phone number:

If you choose **no** to question number 2: you will be asked question number 3, which is: You have indicated that your organization has not had contracts or grants within the past five years and does not currently employ staff with experience to perform the selected Service. Do you wish to submit a Capability Statement that describes current programs offered and the rationale for launching or expanding Services?









If you choose **yes** to question number 3:

You will be directed to upload a capability statement in the Optional Documents section of the Document Vault.

5.2.8. To return to the Grantee Document Vault document list, click the “Document Information” link at the top of the screen.



Repeat the process for the “Not-For-Profit Required Documents.” Please note that some items may require multiple parts (i.e. senior leadership resumes may include more than one resume). In that case, please create one PDF with all of the required resumes and upload that.

Not For Profit Required Documents	
	Certificate of Incorporation or Equivalent Document
	IRS 501(c) Determination Letter
	IRS 990
	Audit/Reviews and Findings
	CHAR500 or CHAR 410
	Board of Directors Profile
	Senior Leadership Resumes
	Corporate Bylaws

Each of the “Required Document” upload pages gives you the ability to select the document you want to upload by using the Browse button. Select the correct document and enter any required information (as indicated by *).

CERTIFICATE OF INCORPORATION OR EQUIVALENT DOCUMENT

Instructions:

- Select the Browse button to locate the file you wish to upload
- Complete all required fields (marked with an *)
- Select the Save button to complete the upload and save the data.

One of the most common documents needed by State Agencies is an organization’s Certificate of Incorporation and amendments. All validly formed business entities must upload relevant organizational documents that have been filed with the NY Department of State.

Upload *

Date Issued *

Click the **SAVE** button after each document is populated. After each “save”, scroll to the bottom of the page and click on the next document in the Required Documents sub-section.

For complete instructions on prequalification forms, documents, and required dates, please see the [Vendor Prequalification Manual](#) found on the [Grants Reform](#) website.

5.2.9. You can also add “Optional Documents.” Be sure to follow the same procedure as the previous sections.

- Populate all required fields.
- Click the **SAVE** button after each document is populated.
- Scroll down and click the next document you wish to include.

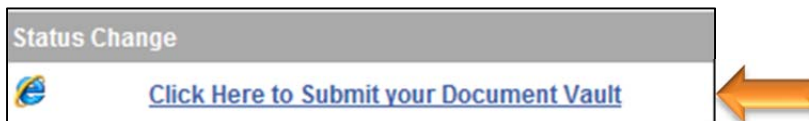


5.2.10. Return to the Document Vault main page by clicking the “**GDV-0000**” link at the top.

5.3. Prequalification

Not-for-profit organizations will use the Document Vault as tool to complete a Prequalification Application to do business with the State. Once you have completed populating your Document Vault, if your organization is a not-for-profit you must submit your Prequalification Application for State review.

5.3.1. On the Document Vault main page click the **Click Here to Submit your Document Vault** link.



5.3.2. Click on the button to submit your Document Vault.

[Back](#) Rectangular Snip

My Organization Information

Select a button below to execute the appropriate status push.

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Document Vault	Denise's NFP	Grantee	Document Vault Modifications Required	N/A - N/A N/A

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Document Vault](#)

Possible Statuses

SUBMIT DOCUMENT VAULT

Select the **Submit Document Vault** button below to submit your Document Vault to the State for review.

Please note: Once you submit your document vault, you will not be able to make changes until a State agency user re-opens it for modifications. Please make sure your changes are complete before pressing the **Submit Document Vault** button.

SUBMIT DOCUMENT VAULT

5.3.3. You will be asked to attest to two certifications in order to submit. Click on “I agree.” (If you click on “I do not agree,” your document vault will not be submitted).

Please make a selection below to continue.

MWBE CERTIFICATION

By selecting the agree button below, I certify and agree that I am authorized on behalf of the applicant and its governing body to commit the applicant, its subsidiaries, and any of its subcontractors, to comply with the requirements of Article 15-A of the New York State Executive Law: Participation By Minority Group Members and Women With Respect To State Contracts by providing opportunities for MBE/WBE participation. I further certify that the applicant, its subsidiaries, and any of its subcontractors will maintain such records and take such actions necessary to demonstrate such compliance throughout the completion of the project. Furthermore, I understand that, should the project receive a funding award, the applicant shall be required to use good faith efforts to achieve prescribed MWBE goals assigned to the project.

MANDATORY CERTIFICATION

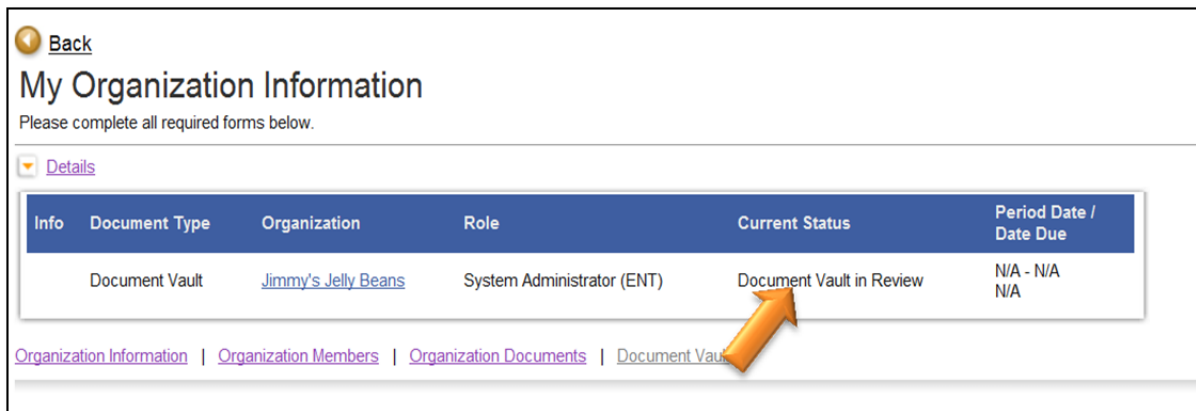
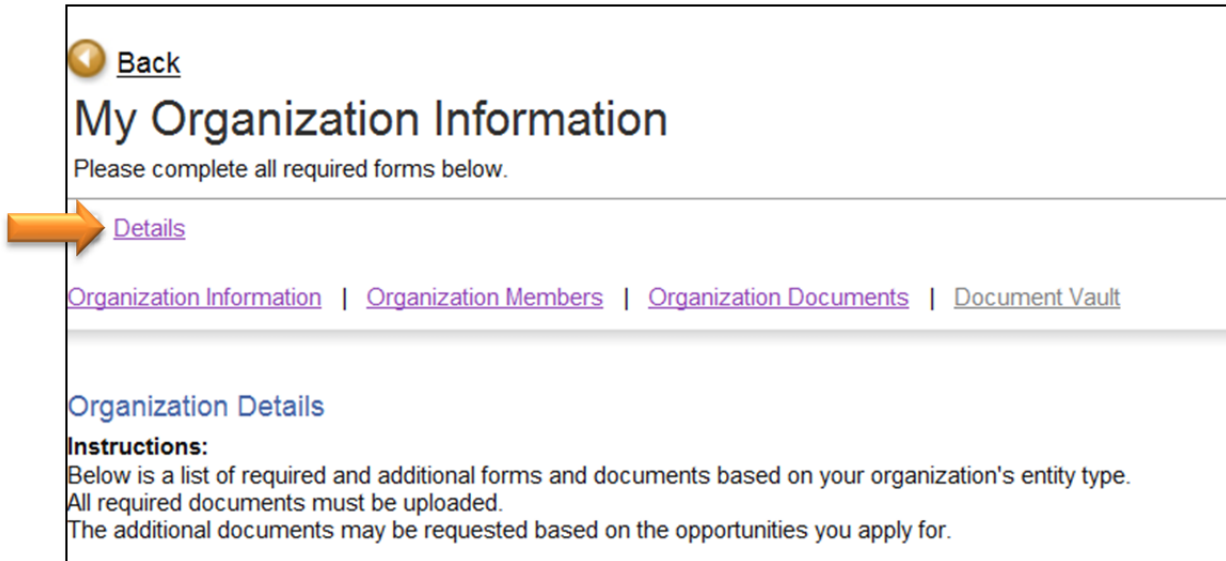
By selecting the agree button below, I certify:

- I am authorized on behalf of the applicant and its governing body to submit this information.
- All of the information contained herein and all statements, data and supporting documents which have been made or furnished, are true and correct and complete to the best of my knowledge and belief.
- I recognize that this questionnaire is submitted for the express purpose of assisting New York State in making responsibility determinations regarding an award of contracts or grants or approval of a subcontract.
- I acknowledge that New York State will rely on such information disclosed by me.
- I acknowledge that New York State may, in its discretion, by means which it may so choose, verify the truth and accuracy of all statements made herein.
- I understand that if any change occurs in the information I have provided, that I will promptly notify the State of such changes and that failure to notify the State of such changes will constitute cause of disapproval of any application or revocation of any agreement made with the State.
- I understand that any false statement or misrepresentation will constitute cause for disapproval of any application or revocation of any agreement made with the State upon which such information was relied.
- I further acknowledge that my submission of this document, knowing that it contains a false statement or false information, constitutes a crime under New York State law, and that I may be prosecuted and subject to a fine and/or a term of imprisonment if so convicted of such a crime.

I AGREE

I DO NOT AGREE


5.3.4. You can then confirm it has been submitted by clicking on the expand Details button on your Document Vault.



Once the Document Vault has been submitted the Grantee Delegated Administrator and/or Grantee that submitted the Document Vault will receive an email indicating that the Document Vault has been submitted. Within the Grants Gateway, a system generated message will also be delivered to the Grants Gateway Inbox.

5.3.5. Once a Prequalification Specialist from a State Agency reviews your Prequalification file, the Document Vault status will change. You can check back to see the status at any time.


- Current Status – Document Vault Prequalified. Your Prequalification Application has been accepted and no further action is required.


Role	Current Status	Period Date / Date Due
System Administrator (ENT)	 Document Vault Prequalified	N/A - N/A N/A

- Current Status – Document Vault Modifications Required. You will receive an email from the Gateway if your Document Vault needs modifications. You will also receive a system generated message in your Grants Gateway Inbox.

My Tasks

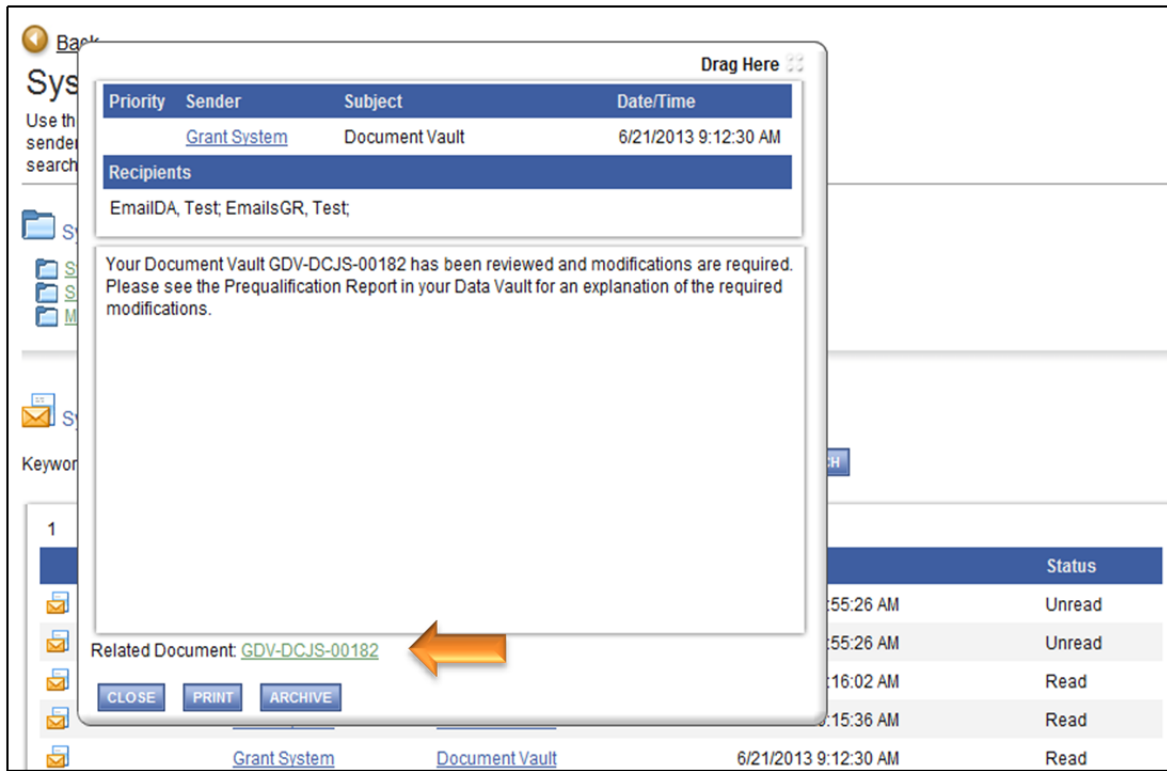
Export Results to Screen Sort by: -- Select -- GO

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Document Vault	Paige Test Emails NFP	GDV-DCJS-00182	Document Vault Modifications Required	6/21/2013	

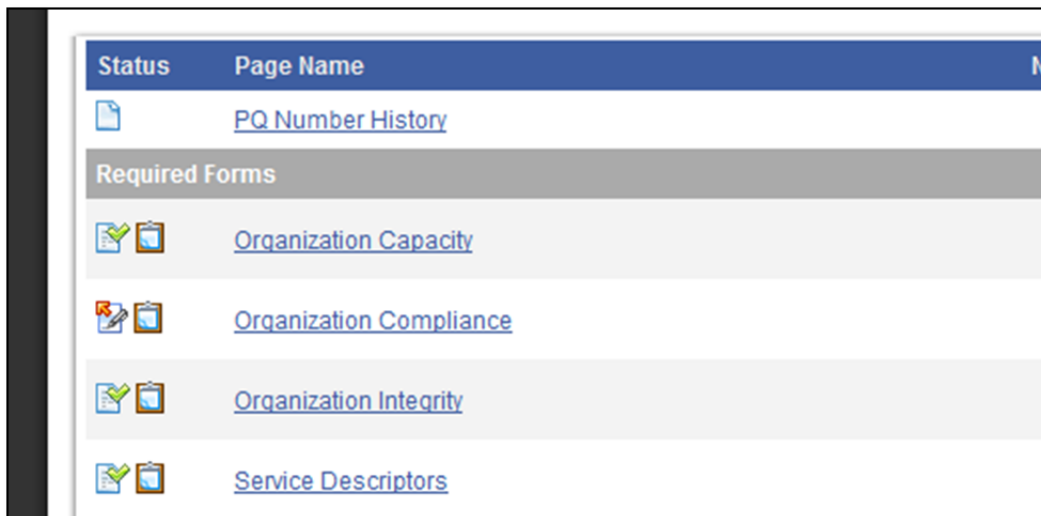


CLOSE TASKS

5.3.6. To retrieve the Document Vault for modifications, click on Home, My Tasks and the link for Document Vault.








5.3.7. As the State Agency reviews the Document Vault they will add questions or comments for the particular section of the Document Vault that requires further information or clarification. This will be indicated by an orange arrow in the first status column of the Document Vault.




5.3.8. When a Document Vault is returned to a Grantee in Modifications Required Status, run the State Prequalification Application Status Report to determine what action is required.

Management Screens

-  [State Prequalification Application Status Report](#)
-  [Status History](#)
-  [Process Flow Snapshot](#)
-  [Modification History](#)
-  [Add/Edit People](#)

Prequalification Application Status Report

Status: Document Vault Modifications Required 

Submission Date: 06/10/2013 07:29:33AM

Name of Roles Assigned: Karen Pierino

Email of Roles Assigned: karen.pierino@otda.ny.gov

Legal Name: FAMILY OF WOODSTOCK INC
 Payee Name: FAMILY OF WOODSTOCK INC
 SFS Vendor ID: 1000027410

Prequalification Element	Date Modified	Prequalification Status	Date Of Status	Internal Comments	Comments for Vendor
Organization Capacity	06/03/2013 08:13:51AM	Approved	06/19/2013 09:39:35AM		
Organization Compliance	06/03/2013 08:20:19AM	Pending	06/19/2013 10:37:15AM	Question 11 requires an Anti-Nepotism policy	Question 11- Agency is requi
Organization Integrity	06/03/2013 08:31:36AM	Approved	06/19/2013 09:53:22AM		

5.3.9. Unless otherwise instructed by the State agency you should make the necessary corrections where indicated on the Prequalification Status Report , then follow the instructions for submitting a Document Vault as outlined beginning in Section 5.3.1, Submitting a Document Vault.

Once the corrected Document Vault has been resubmitted the State agency will complete its review. When the Vault in its entirety is considered acceptable, the reviewer will change the status to Document Vault Prequalified.

The Grantee Delegated Administrator will receive a system generated email in the Grants Gateway Mailbox indicating the Prequalified Status and will also receive a system generated message in the system Inbox.



Your Task box will no longer show a “Document Vault” Task, which also is an indication that no further work on the Document Vault is required.

- 5.3.9.1. To view the Document Vault status, click on the Organization(s) link, then click on the Details link on the next screen. Notice that the status has changed to Document Vault Prequalified.

My Organization Information
Please complete all required forms below.

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Document Vault	Adirondack Historical Association	System Administrator (ENT)	Document Vault Prequalified	N/A - N/A N/A

To view the final Prequalification Status Report Scroll to the bottom of the Document Vault page and select State Prequalification Application Status Report.

View the results of the report to confirm that the agency has approved the Document Vault.

Management Screens

-  [State Prequalification Application Status Report](#)
-  [Status History](#)
-  [Process Flow Snapshot](#)
-  [Modification History](#)
-  [Add/Edit People](#)

Prequalification Application Status Report



Status: Document Vault Prequalified
Submission Date: 06/19/2013 11:13:30AM
Name of Roles Assigned: Emma PQL Graham, Randal Palmer
Email of Roles Assigned: emma.graham@ovs.ny.gov, frank.hughes@budget.ny.gov

Legal Name: Adirondack Historical Association
Payee Name: ADIRONDACK HISTORICAL ASSOC

You should print this report for your files.

5.4. Required Documents Expiration

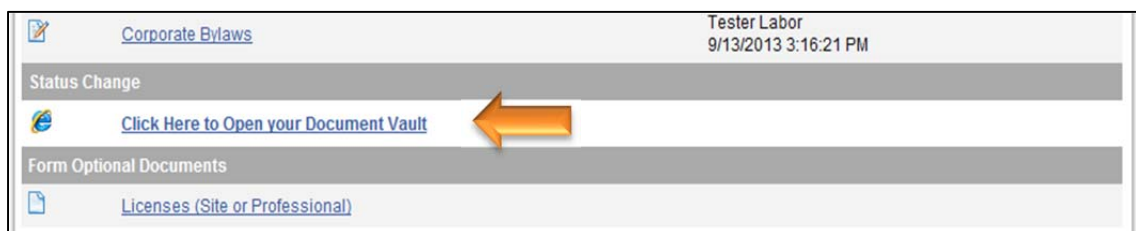
New York State requires Grantees to annually update the organization's IRS 990 Tax Form, the Audit Review and Findings and the CHAR 500 (Charities Registration Form) in the Grants Gateway to remain Prequalified and eligible for State grant awards.

- 5.4.1. The Grants Gateway will send system generated email to each Grantee Delegated Administrator for your organization 30, 20 days and 10 days in advance of the expiration of one of the Required Documents.

Upon receiving this email, the Grantee should obtain all of the documents that require updating. Only the IRS 990, Audit Review and Findings and the CHAR 500 Charities Registration Form require annual updating.

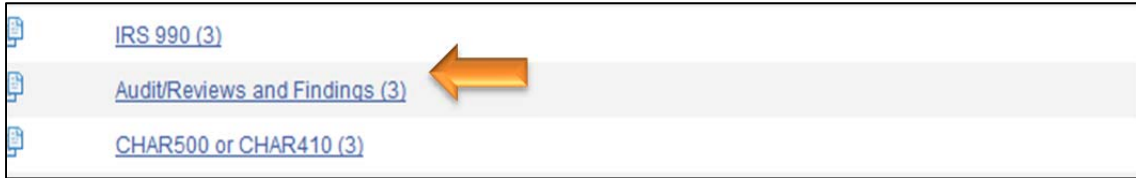
- 5.4.2. The Grantee does not have to wait the intervening 30 days to upload the Documents. To open the Document Vault for updating, log into the Grants Gateway and click the Organization link in top blue navigation ribbon. Click the Document Vault link to open the main Document Vault page.

- 5.4.3. From the main Document Vault page use the Click Here to Open Document Vault link. This will change the status to Document Vault Prequalified Open and the Grantee can upload the new documents by clicking the appropriate section from the Main Document Vault page. Please note that proactively opening your vault for updates does not affect your Prequalified status.



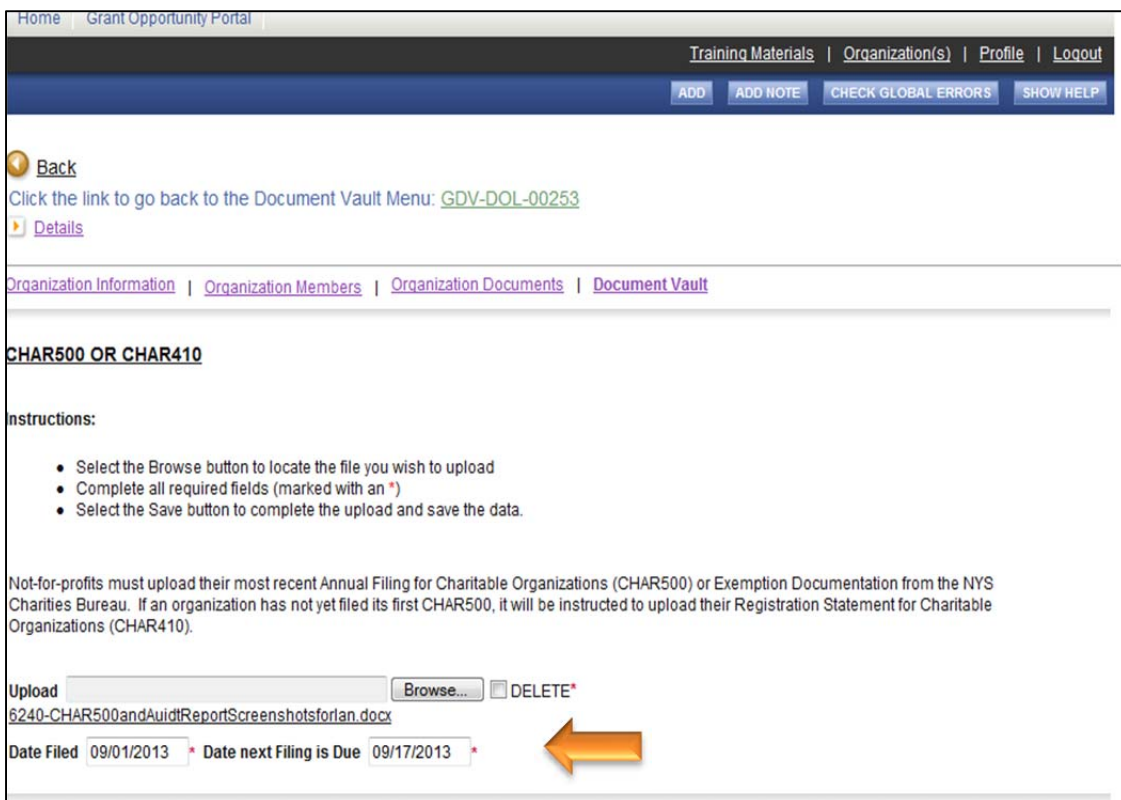
The Grants Gateway uses the filed Date Next Filing is Due to trigger the Document Vault to change from its current status to Document Vault Expired. Once the Document Vault is in Expired Status the Grantee is

no longer Prequalified, and must upload the most current documents or the appropriate extension from the IRS and submit for review to reinstate Prequalified Status.

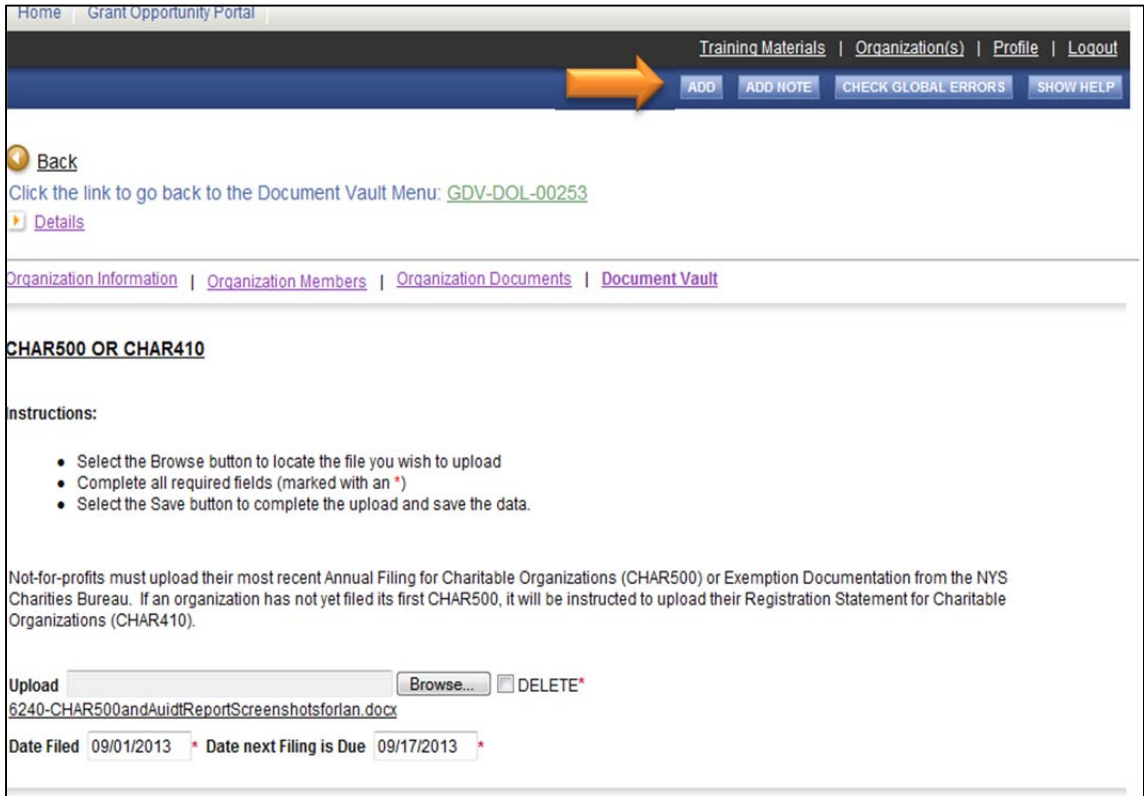


From the main Document Vault Page click the link for each of the documents that require updating. You will see the current document that is uploaded and the Date Next Filing is Due is nearing expiration or has expired.

In the example below the CHAR 500 would expire on 9/17/2013 which will prompt the Grants Gateway to change the status of the Document Vault to Expired. Please see the [Vendor Prequalification Manual](#) for more information on expiration dates.



Next, in each of the three sections select the ADD button from the top navigation ribbon to open a new screen that allows you to enter new dates and to upload the newest, most current form. (IRS 990, Audit Review and Findings, and CHAR 500 Charities Registration Form).



Home | Grant Opportunity Portal

Training Materials | Organization(s) | Profile | Logout

ADD ADD NOTE CHECK GLOBAL ERRORS SHOW HELP

Back
Click the link to go back to the Document Vault Menu: [GDV-DOL-00253](#)
[Details](#)

Organization Information | Organization Members | Organization Documents | Document Vault

CHAR500 OR CHAR410

Instructions:

- Select the Browse button to locate the file you wish to upload
- Complete all required fields (marked with an *)
- Select the Save button to complete the upload and save the data.

Not-for-profits must upload their most recent Annual Filing for Charitable Organizations (CHAR500) or Exemption Documentation from the NYS Charities Bureau. If an organization has not yet filed its first CHAR500, it will be instructed to upload their Registration Statement for Charitable Organizations (CHAR410).

Upload DELETE*

6240-CHAR500andAuditReportScreenshotsforlan.docx

Date Filed 09/01/2013 * Date next Filing is Due 09/17/2013 *

CHAR500 OR CHAR410

Instructions:

- Select the Browse button to locate the file you wish to upload
- Complete all required fields (marked with an *)
- Select the Save button to complete the upload and save the data.

Not-for-profits must upload their most recent Annual Filing for Charitable Organizations (CH Charities Bureau. If an organization has not yet filed its first CHAR500, it will be instructed to Organizations (CHAR410).

Upload *

Date Filed * Date next Filing is Due *

5.4.4. Once the Grantee has completed the uploading process for the three updated documents the next step is to submit the Document Vault to the State for review.

To submit a Document Vault, navigate to the main Document Vault page and use the Click here to Submit Document Vault link. Just as when you first submitted the Document Vault, you will be asked to agree to an attestation before submitting the Document Vault. You will then receive a system generated email indicating that your Document Vault has been submitted successfully. The Document Vault will be assigned to a State Prequalification Specialist for review and approval of the new documents. If you have proactively updated your document vault, your status will be set to Prequalified In Review and your Prequalification status will remain intact. If, however, your document vault has been allowed to Expire, your status will be Document Vault in Review. This is not a prequalified status; you will not be prequalified until the new documents are approved and your status reset to Prequalified.

6. Online Application

This section of the User Guide is to provide direction for the process of applying online for a grant via Grants Gateway. It provides a brief overview of the process that a Grantee should follow in order to find a grant to apply for and follow the application process through to submission.

At this point the Grantee Organization should already be registered in the Grants Gateway, and the appropriate person should have a username and password and be assigned the role of Grantee* in the system. Not-for-profits should already have been registered and prequalified. If you have not registered or are not prequalified, please go through the related Registration (Section 3) and/or Grantee Document Vault (Section 5) section(s) of this document first.

This section will include following sub-sections:

- Search for Grants
- Create an Online Application for a Specific Grant
- Retrieve Application
- Add/Edit Users tool
- Submit an Online Application
- Tools Available

**Note that Grantee System Administrator and Grantee Contract Signatory may also initiate and edit an online application.*

6.1. Search for Grants

6.1.1. To begin using the Gateway, click on Grants Gateway Login at the top left corner of the Grants Gateway.



Note: If you have two usernames and roles, make sure you log in as a Grantee.

6.1.2. In the login section enter the Username and Password.

Note: If you try to login twice and you get a warning that your Password is not correct, do not attempt to log in a third time or you will be locked out for 15 minutes. After two attempts, click on “Forgot Password” just below the Login information and enter your username and email address. You will be emailed a new password within minutes.

6.1.3. Click on “View Opportunities” link on the home screen to view all available opportunities.

6.1.4. On the Available Opportunities page, a high-level list of open solicitations is presented. Funding Agency and Due date are listed along with the eligible entities that may apply for a specific grant.

[Back](#)

Opportunities

Search by Grant Opportunity

Search by Due Date From: To:

Search by Eligibility

Search by Funding Agency

Search Results

Click the **Grant Opportunity Name** to view more detail and apply.
Sort the results by clicking on a column heading (sorting by Eligibility is not an option)
A full list of Grant Opportunities can be found on the [Grant Opportunity Portal](#).


Funding Agency	Grant Opportunity	Status	Availability Date	Eligibility	Due Date
Office of Temporary & Disability Assistance	Short Term disability training	Available	December 30, 2013	For Profit, Governmental Entity, Individual, Not-For-Profit, Tribal Organization	Feb 3 2015 1:00AM
Office of Temporary & Disability Assistance	Short Term disability training	Available	December 30, 2013	For Profit, Governmental Entity, Individual, Not-For-Profit, Tribal Organization	Feb 3 2015 1:00AM
Division of Criminal Justice Services	DCJS Demo 2014 Alternative to Incarceration Grant	Available	November 11, 2013	For Profit, Governmental Entity, Individual, Not-For-Profit, Tribal Organization	Nov 15 2014 4:00PM

6.1.5. Users can also find grant opportunity they wish to apply for by using available search criteria such as:

- Search By Grant Opportunity Name
- Search by Due Date
- Search by Eligibility
- Search by Funding Agency



6.1.6. To learn more about it or to begin the opportunity, click on the name of the Grant Opportunity.

Funding Agency	Grant Opportunity	Status	Availability Date	Eligibility	Due Date
Division of Criminal Justice Services	DCJS Demo 2014 Alternative to Incarceration Grant 	Available	November 11, 2013	For Profit, Governmental Entity, Individual, Not-For-Profit, Tribal Organization	Nov 15 2014 4:00PM

6.2. Create an Online Application for a Specific Grant

6.2.1. By Clicking on the Grant Opportunity Name on the Opportunities Page, the system will display the main page of any particular Grant Opportunity.

[Back](#)

Opportunities

NOTICE: Online application is required for this opportunity. If you are concerned about your ability to apply online please contact Video at tutorial@tutorial.com.

Funding Profile

<p>Grant Opportunity ID DCJ01-ABCD-2013</p> <p>Agency Division of Criminal Justice Services</p> <p>Grant Opportunity DCJS Demo 2013 Alternative to Incarceration Grant</p> <p>Contact Name Video</p> <p>Contact Email tutorial@tutorial.com</p> <p>Solicitation Profile This is a demonstration grant description to provide an example of what a Grant Opportunity Description could look like.</p> <p style="text-align: center;">APPLY FOR GRANT OPPORTUNITY</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #003366; color: white;"> <th colspan="2">Full Announcement Details</th> </tr> </thead> <tbody> <tr> <td>Announcement Link</td> <td>Click here</td> </tr> <tr> <td>Release Date</td> <td>Tuesday, October 22, 2013</td> </tr> <tr style="background-color: #f2f2f2;"> <td>Applications Due (Funding Round (FR) / Date / Time)</td> <td> <ul style="list-style-type: none"> FR 1 / December 25, 2013 / 04:00 PM EST </td> </tr> <tr> <td>Bidder's Conference(s)/Application Workshop(s)</td> <td><i>None available</i></td> </tr> <tr style="background-color: #f2f2f2;"> <td>Anticipated Award Date</td> <td></td> </tr> <tr> <td>Anticipated Initial Contract Length</td> <td>24 Months</td> </tr> <tr style="background-color: #f2f2f2;"> <td>Total Funding Available</td> <td>\$1,200,000.00</td> </tr> <tr> <td>Anticipated Amount of Award(s)</td> <td></td> </tr> <tr style="background-color: #f2f2f2;"> <td>Letter of Intent</td> <td></td> </tr> <tr> <td>Letter of Intent Due</td> <td></td> </tr> <tr style="background-color: #f2f2f2;"> <td>Eligible Applicants</td> <td>Not-For-Profit, For Profit, Governmental Entity, Tribal Organization, Individual</td> </tr> <tr> <td>Target Population(s)</td> <td>Age - Adults, Caregivers</td> </tr> <tr style="background-color: #f2f2f2;"> <td>Service Category(ies)</td> <td>Justice Services</td> </tr> </tbody> </table>	Full Announcement Details		Announcement Link	Click here	Release Date	Tuesday, October 22, 2013	Applications Due (Funding Round (FR) / Date / Time)	<ul style="list-style-type: none"> FR 1 / December 25, 2013 / 04:00 PM EST 	Bidder's Conference(s)/Application Workshop(s)	<i>None available</i>	Anticipated Award Date		Anticipated Initial Contract Length	24 Months	Total Funding Available	\$1,200,000.00	Anticipated Amount of Award(s)		Letter of Intent		Letter of Intent Due		Eligible Applicants	Not-For-Profit, For Profit, Governmental Entity, Tribal Organization, Individual	Target Population(s)	Age - Adults, Caregivers	Service Category(ies)	Justice Services
Full Announcement Details																													
Announcement Link	Click here																												
Release Date	Tuesday, October 22, 2013																												
Applications Due (Funding Round (FR) / Date / Time)	<ul style="list-style-type: none"> FR 1 / December 25, 2013 / 04:00 PM EST 																												
Bidder's Conference(s)/Application Workshop(s)	<i>None available</i>																												
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Anticipated Amount of Award(s)																													
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Eligible Applicants	Not-For-Profit, For Profit, Governmental Entity, Tribal Organization, Individual																												
Target Population(s)	Age - Adults, Caregivers																												
Service Category(ies)	Justice Services																												

[Top of the Page](#)

6.2.2. The following details about the particular Grant opportunity will be displayed on the main page of the Grant Opportunity.

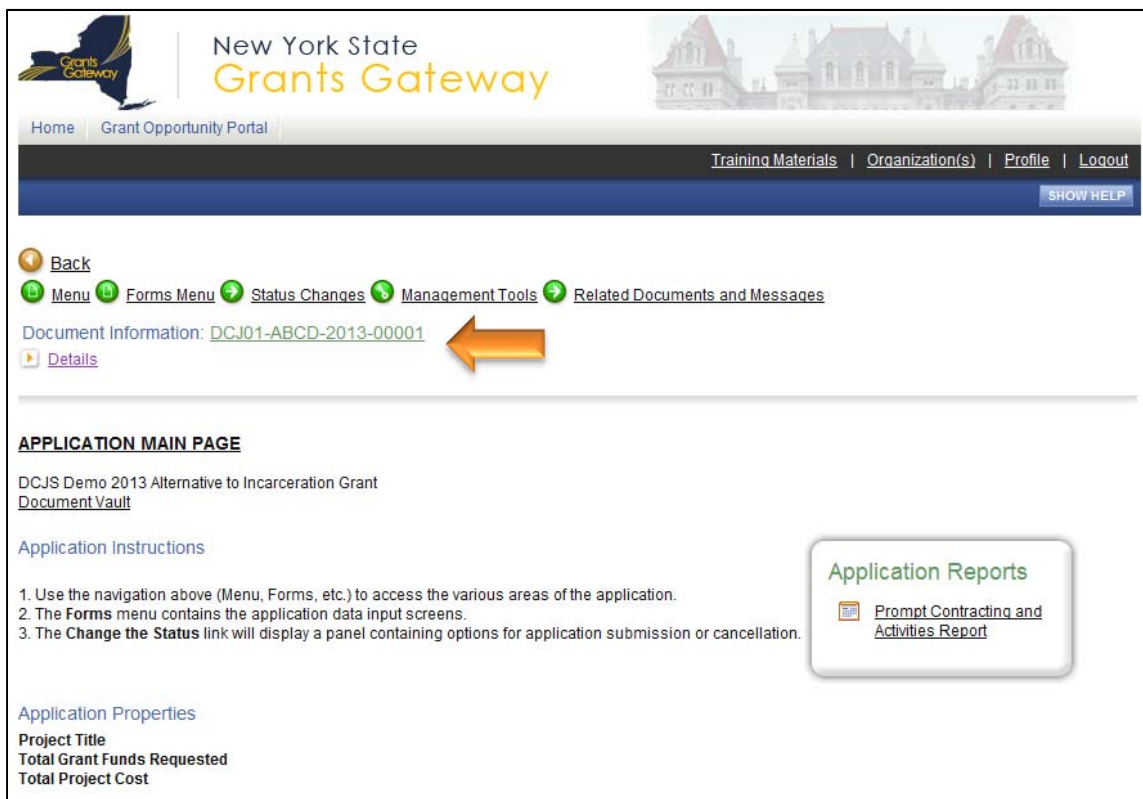
- Grant Opportunity ID
- Agency issuing the Grant Opportunity
- Contact Person Name and Email address
- The Profile of the available Grant Opportunity
- Full Announcement Details

6.2.3. Click on the “APPLY FOR GRANT OPPORTUNITY” link to begin the application process.



It is very important you do not click “Apply for Grant Opportunity” again (after your initial application has been created) in the system, as it will create duplicate applications (if the RFP allows more than one Application per grantee). Once an application has been initiated, you should continue using that one by utilizing the application search function (see section 6.3 for information).

6.2.4. The system will display the Main screen of the application. Note the Application ID assigned.



New York State
Grants Gateway

Home | Grant Opportunity Portal

Training Materials | Organization(s) | Profile | Logout

SHOW HELP

Back

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Document Information: DCJ01-ABCD-2013-00001

Details

APPLICATION MAIN PAGE

DCJS Demo 2013 Alternative to Incarceration Grant
Document Vault

Application Instructions

1. Use the navigation above (Menu, Forms, etc.) to access the various areas of the application.
2. The **Forms** menu contains the application data input screens.
3. The **Change the Status** link will display a panel containing options for application submission or cancellation.

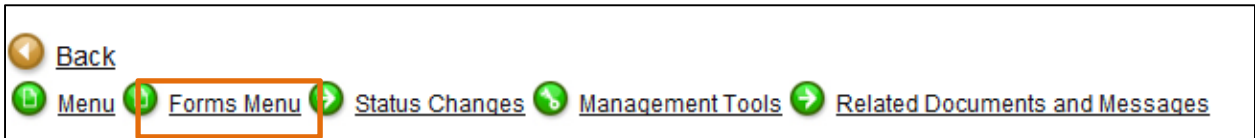
Application Reports

Prompt Contracting and Activities Report

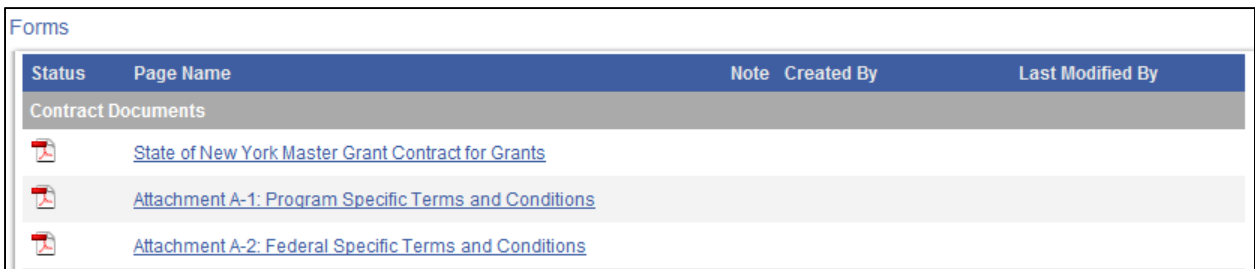
Application Properties

Project Title
Total Grant Funds Requested
Total Project Cost

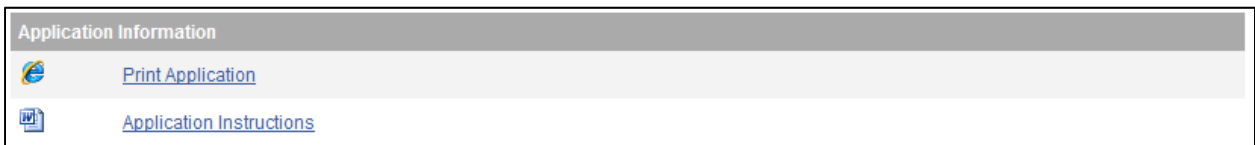
6.2.5. Click on the Forms Menu to complete the application forms to apply for the Grant Opportunity.



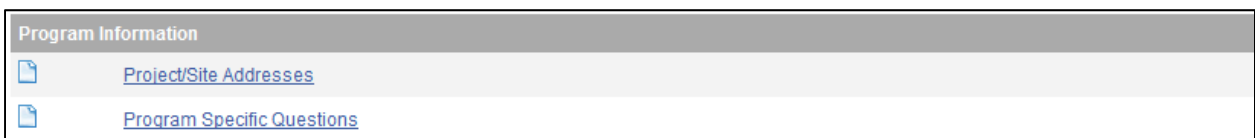
6.2.6. The first section of the Forms Menu will display sample Contract Documents, including a blank version of New York State’s Master Contract for Grants and any Program Specific or Federal Terms and Conditions.



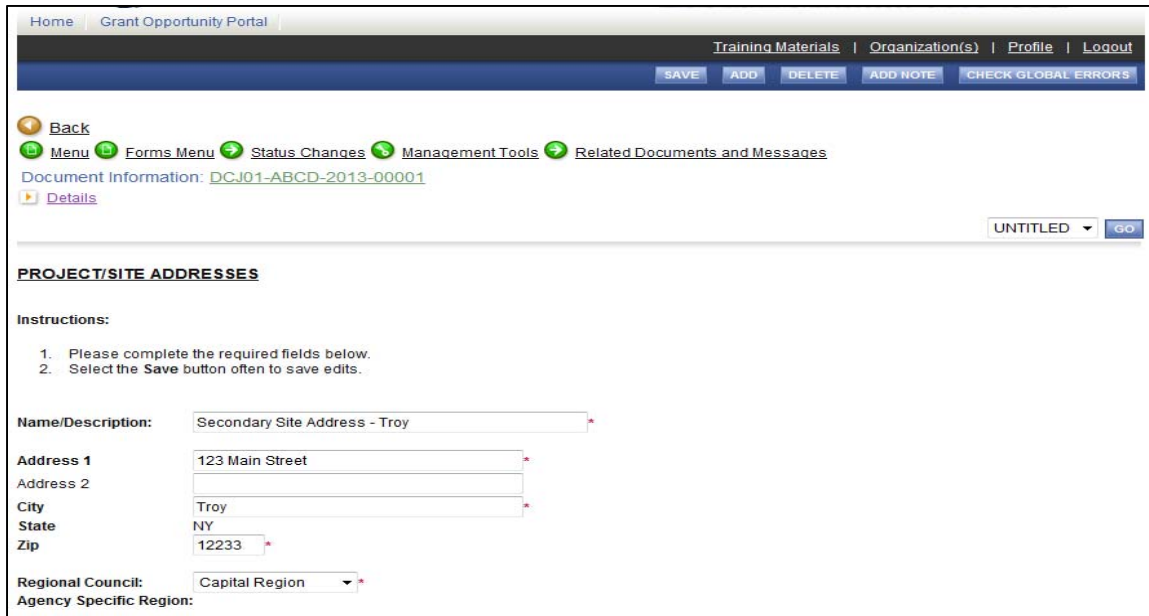
6.2.7. The second section of the Forms Menu includes Application Information. The Print Application link will allow you to print the application as you fill in the information. This section will also have additional Application Instructions if the State Agency has provided them.



6.2.8. The next section in the Forms Menu is Program Information.



6.2.8.1. Click on the Project/Site Addresses to open the form and complete the information.



Home Grant Opportunity Portal

Training Materials | Organization(s) | Profile | Logout

SAVE ADD DELETE ADD NOTE CHECK GLOBAL ERRORS

Back

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Document Information: DCJ01-ABCD-2013-00001

Details

UNTITLED GO

PROJECT/SITE ADDRESSES

Instructions:

1. Please complete the required fields below.
2. Select the Save button often to save edits.

Name/Description: Secondary Site Address - Troy

Address 1: 123 Main Street

Address 2:

City: Troy

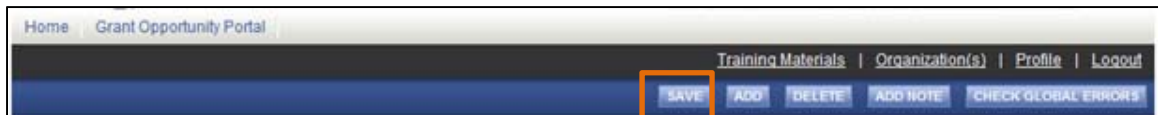
State: NY

Zip: 12233

Regional Council: Capital Region

Agency Specific Region:

6.2.8.2. Click on the SAVE button to save the information on this page.

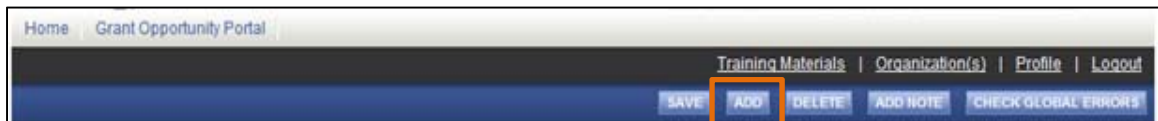


Home Grant Opportunity Portal

Training Materials | Organization(s) | Profile | Logout

SAVE ADD DELETE ADD NOTE CHECK GLOBAL ERRORS

6.2.8.3. Click on the ADD button to add a second address.



Home Grant Opportunity Portal

Training Materials | Organization(s) | Profile | Logout

SAVE ADD DELETE ADD NOTE CHECK GLOBAL ERRORS

Note: The add button will only appear if it was allowed by the funding agency. When more than one address is saved in the system, a pull down menu will appear which gives you an option to go to any of the previously saved addresses.



















6.2.8.4. Return to the forms Menu and click on the Program Specific Questions to open the form. Follow the instructions provided in the opportunity to complete the form.

6.2.8.5. Click on the SAVE button to save the information on this page.

6.2.8.6. Click on the DELETE button if you wish to delete the information entered on the Program Specific Questions form.

6.2.9. The next section in the Forms Menu will be the Budget Section. This section will have forms based on the budget type the State Agency has chosen for this opportunity.

6.2.9.1. Expenditure Budget

Expenditure Budget	
	Personal Services - Salary
	> Personal Services - Salary Narrative
	Personal Services - Fringe
	> Personal Services - Fringe Narrative
	Contractual
	Travel
	Equipment
	> Equipment Narrative
	Utilities
	> Utilities Narrative
	Operating Expenses
	> Operating Expenses Narrative
	Other Expenses Detail
	> Other Narrative
	Expenditure Summary
	Revenue Worksheet
	> Revenue Narrative
	Administrative Worksheet

- Fill all the applicable detail budget forms you need to include in your budget by clicking on the individual forms.
- After you fill the form click on the SAVE button to save the entered information on the budget category.
- The system might include a Match Worksheet, Revenue Worksheet and/or Administrative worksheet for you to complete only if the funding agency has made it a requirement.
- Once your detail pages have been completed, click on the Expenditure Summary and click save to insure everything has been entered as required.

EXPENDITURE SUMMARY

Instructions:

1. Save this form to display a roll-up of the category budget details.
2. Click Forms Menu to return to the navigation links.







Category of Expense	Grant Funds	Match Funds	Match % Calculated	Match % Required	Other Funds	Total
1. Personal Services						
a) Salary	\$0	\$0	0%	0%	\$0	\$0
b) Fringe	\$0	\$0	0%	0%	\$0	\$0
Subtotal	\$0	\$0	0%		\$0	\$0
2. Non Personal Services						
a) Contractual	\$25,000.00	\$25,000.00	100%	100%	\$0	\$50,000.00
b) Travel	\$0	\$0	0%	0%	\$0	\$0
c) Equipment	\$0	\$0	0%	0%	\$0	\$0
d) Space/Property & Utilities	\$0	\$0	0%	0%	\$0	\$0
e) Operating Expenses	\$0	\$0	0%	0%	\$0	\$0
f) Other	\$25,000.00	\$25,000.00	100%	100%	\$0	\$50,000.00
Subtotal	\$50,000.00	\$50,000.00	100%		\$0	\$100,000.00
Total	\$50,000.00	\$50,000.00	100%	0%	\$0	\$100,000.00
PERIOD TOTAL	\$25,000.00					

6.2.9.2. Performance Budget

Performance Budget	
 Performance Budget	A ZohraGrantee 2/26/2014 1:43:47 PM
 Performance Summary	A ZohraGrantee 2/26/2014 1:44:14 PM



- Fill in the Performance Budget form by clicking on the form.
- After you fill the form click on the SAVE button to save the entered information on the budget category.
- Once your detail pages have been completed, click on the Performance Summary and click save to insure everything has been entered as required.

6.2.9.3. Capital Budget

Capital Budget	
 Scoping and Pre Development	
 Design	
 Acquisition	
 Construction	
 Administration	
 Capital Summary	

- a. Fill all the applicable forms you need to include in your budget by clicking on the form.
- b. After you fill the form click on the SAVE button to save the entered information on the budget category.
- c. Once your detail pages have been completed, click on the Capital Summary and click save to insure everything has been entered as required.

6.2.9.4. Net Deficit Budget




Net-Deficit Budget	
	Net Deficit Budget Narrative Rob Zombie 11/15/2013 2:44:57 PM
	Net Deficit Budget (4)

- a. Fill in the Net Deficit Budget form by clicking on the form.
- b. After you fill the form click on the SAVE button to save the entered information on the budget category

6.2.10. The next section of the Forms Menu is the Work Plan. The Work Plan can be Grant Opportunity Defined **or** Grantee Defined based on the funding agency decision.

6.2.10.1. Grant Opportunity Defined Work Plan

When the funding agency defines a Work Plan, Objectives and Tasks in Grants Gateway, you will see Grant Opportunity Defined Work plan in the Forms Menu.

Work Plan: Grant Opportunity Defined	
	Work Plan Overview Form 
	Objectives and Tasks Grant System 3/12/2014 3:45:04 PM

- Click on the Work Plan Overview Form and complete all the mandatory fields.

[Back](#)
[Menu](#) [Forms Menu](#) [Status Changes](#) [Management Tools](#) [Related Documents and Messages](#)

Document Information: [ART01-111-2014-00001](#)
My Activities: [New 0](#), [Current 0](#), [Review 0](#), [Assigned 0](#)
[Details](#)

WORK PLAN OVERVIEW FORM

Instructions:
The purpose of this form is to capture organizational information necessary for application processing, as well as a detailed accounting of the proposed or funded project. It is made up of three sections:

1. Project Summary
2. Organizational Capacity
3. Project Details - Objectives, Tasks and Performance Measures

If applicable, specific instructions/requirements for completing these sections may be found in the Grant Opportunity under which you are applying. Click Forms Menu to return to the navigation links.

Work Plan Period From * To *

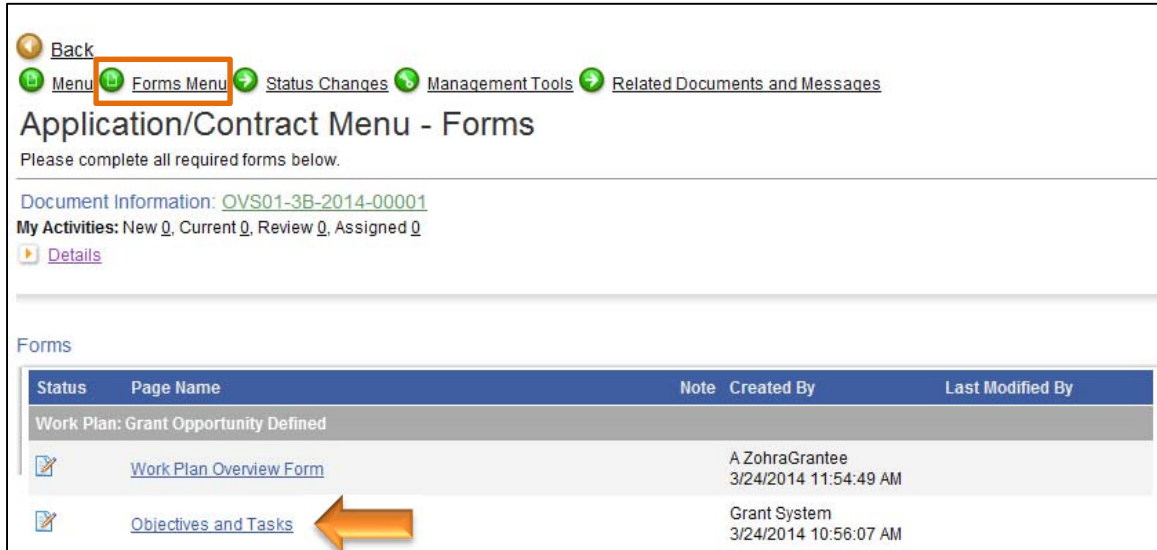
Project Summary
Provide a high-level overview of the project, including the overall goal and desired outcomes. Include information such as location, target population, overall number of persons to be served, service delivery method and hours of operation.

Organizational Capacity
Describe the staffing, qualifications and ongoing staff development/training activities, and relevant experience of the provider organization to support the project.

- Click on the **SAVE** button after all the required information is entered in the Work Plan Overview form.

[Training Materials](#) | [Organization\(s\)](#) | [Profile](#) | [Logout](#)

- Click on the Objectives and Task to complete the Tasks



Back

Menu **Forms Menu** Status Changes Management Tools Related Documents and Messages

Application/Contract Menu - Forms

Please complete all required forms below.

Document Information: [OVS01-3B-2014-00001](#)

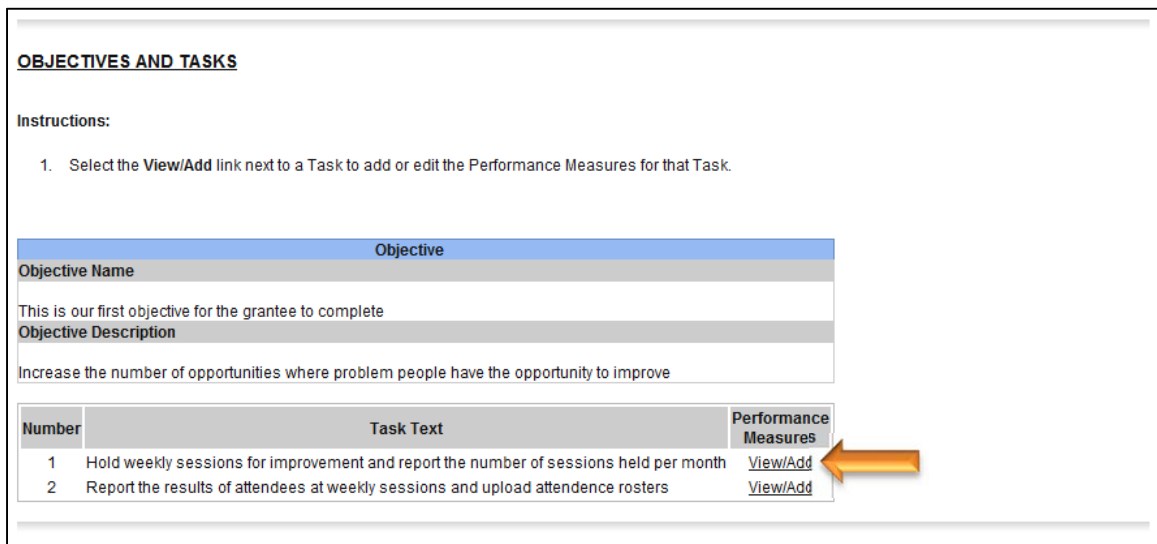
My Activities: [New 0](#), [Current 0](#), [Review 0](#), [Assigned 0](#)

[Details](#)

Forms

Status	Page Name	Note	Created By	Last Modified By
Work Plan: Grant Opportunity Defined				
	Work Plan Overview Form		A ZohraGrantee 3/24/2014 11:54:49 AM	
	Objectives and Tasks		Grant System 3/24/2014 10:56:07 AM	

- Click on the View/Add link to add Performance Measures for each of the defined Tasks



OBJECTIVES AND TASKS

Instructions:

1. Select the **View/Add** link next to a Task to add or edit the Performance Measures for that Task.

Objective	
Objective Name	
Objective Description	This is our first objective for the grantee to complete Increase the number of opportunities where problem people have the opportunity to improve

Number	Task Text	Performance Measures
1	Hold weekly sessions for improvement and report the number of sessions held per month	View/Add
2	Report the results of attendees at weekly sessions and upload attendance rosters	View/Add

- Enter required information on the Performance Measure screen

[Back](#)

[Menu](#) [Forms Menu](#) [Status Changes](#) [Management Tools](#) [Related Documents and Messages](#)

Document Information: [DOL01-ABC-2014-00001](#)

My Activities: [New 0](#), [Current 0](#), [Review 0](#), [Assigned 0](#)

[Details](#)

PERFORMANCE MEASURE

Instructions:

1. Enter a *Performance Measure* in the field(s) provided below.
2. Select the **Save** button.
3. To add another *Performance Measure*, select the **Add** button above.
4. Click **Forms Menu** to return to the navigation links.

Objective: This is our first objective for Grantee to complete
Task: Grant Opportunity Defined Objectives and Tasks 1

Performance Measure Name

Narrative

0 of 1000

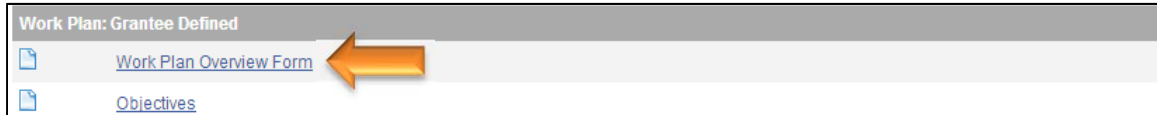
Upload

- Click on the **SAVE** button after all the required information is entered in the form.

[Training Materials](#) | [Organization\(s\)](#) | [Profile](#) | [Logout](#)

6.2.10.2. Grantee Defined Work Plan

When the Grantee is instructed to define the Work Plan, Objectives and Tasks in the Grants Gateway, you will see Grantee Defined Work plan in the Forms Menu.



- Click on the Work Plan Overview Form and complete all the mandatory fields.

[Back](#)

[Menu](#)
[Forms Menu](#)
[Status Changes](#)
[Management Tools](#)
[Related Documents and Messages](#)

Document Information: [ART01-111-2014-00001](#)

My Activities: [New](#), [Current](#), [Review](#), [Assigned](#)

[Details](#)

WORK PLAN OVERVIEW FORM

Instructions:
 The purpose of this form is to capture organizational information necessary for application processing, as well as a detailed accounting of the proposed or funded project. It is made up of three sections:

1. Project Summary
2. Organizational Capacity
3. Project Details - Objectives, Tasks and Performance Measures

If applicable, specific instructions/requirements for completing these sections may be found in the Grant Opportunity under which you are applying. Click Forms Menu to return to the navigation links.

Work Plan Period From * To *

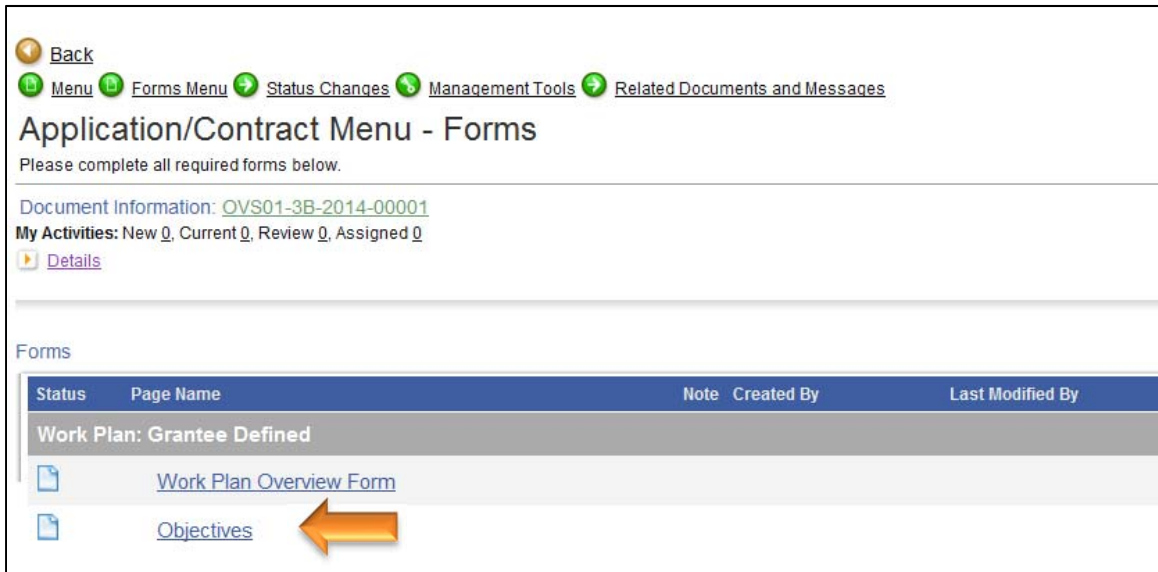
Project Summary
 Provide a high-level overview of the project, including the overall goal and desired outcomes. Include information such as location, target population, overall number of persons to be served, service delivery method and hours of operation.

Organizational Capacity
 Describe the staffing, qualifications and ongoing staff development/training activities, and relevant experience of the provider organization to support the project.

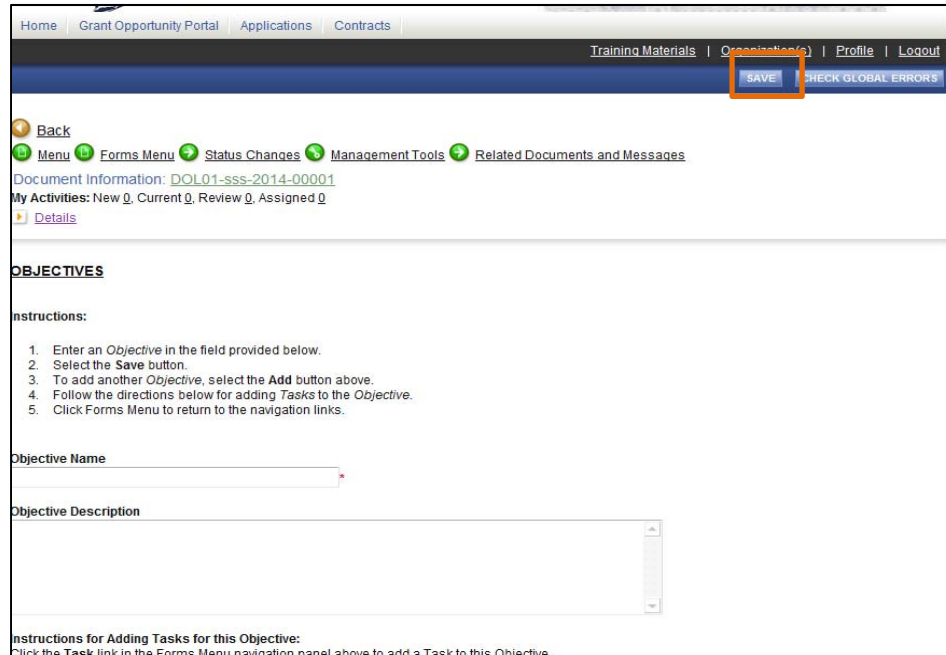
- Click on the SAVE button after all the required information is entered in the Work Plan Overview form.



- Click on the Objectives link to enter an Objective for this project.



- Click on the SAVE button after all the required information is entered.



Home | Grant Opportunity Portal | Applications | Contracts | Training Materials | **Objectives** | Profile | Logout

SAVE | CHECK GLOBAL ERRORS

[Back](#)

[Menu](#) [Forms Menu](#) [Status Changes](#) [Management Tools](#) [Related Documents and Messages](#)

Document Information: [DOL01-sss-2014-00001](#)

My Activities: [New 0](#), [Current 0](#), [Review 0](#), [Assigned 0](#)

[Details](#)

OBJECTIVES

Instructions:

1. Enter an *Objective* in the field provided below.
2. Select the **Save** button.
3. To add another *Objective*, select the **Add** button above.
4. Follow the directions below for adding *Tasks* to the *Objective*.
5. Click **Forms Menu** to return to the navigation links.

Objective Name

Objective Description

Instructions for Adding Tasks for this Objective:
[Click the Task link in the Forms Menu navigation panel above to add a Task to this Objective](#)

Note: The system will allow adding more than one objective if not restricted by Funding Agency.

- After you save the Objective, hover over the Forms Menu and click on the Tasks link to enter task(s) for the Objective you created.

New York State
Grants Gateway

Home | Grant Opportunity Portal | Applications | Contracts

Training Materials | Organization(s) | Profile | Logout

SAVE | ADD | DELETE | ADD NOTE | CHECK GLOBAL ERRORS

Back

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Document Information

My Activities: New 0, Current 0, Review 0, Assigned 0

Details

OBJECTIVES

Instructions:

1. Enter an Objective
2. Select the Save
3. To add another Objective
4. Follow the direct
5. Click Forms Men

Objective Name
ABC Objective

Objective Description
Test

Status	Page Name	Note
	Work Plan Overview Form	
	Objectives	
	Tasks	

- Enter all the required information and click on the save button on the Tasks screen.

Training Materials | Organization(s) | Profile | Logout

SAVE | CHECK GLOBAL ERRORS

Back

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Document Information: DOI_01-sss-2014-00001

My Activities: New 0, Current 0, Review 0, Assigned 0

Details

TASKS

Instructions:

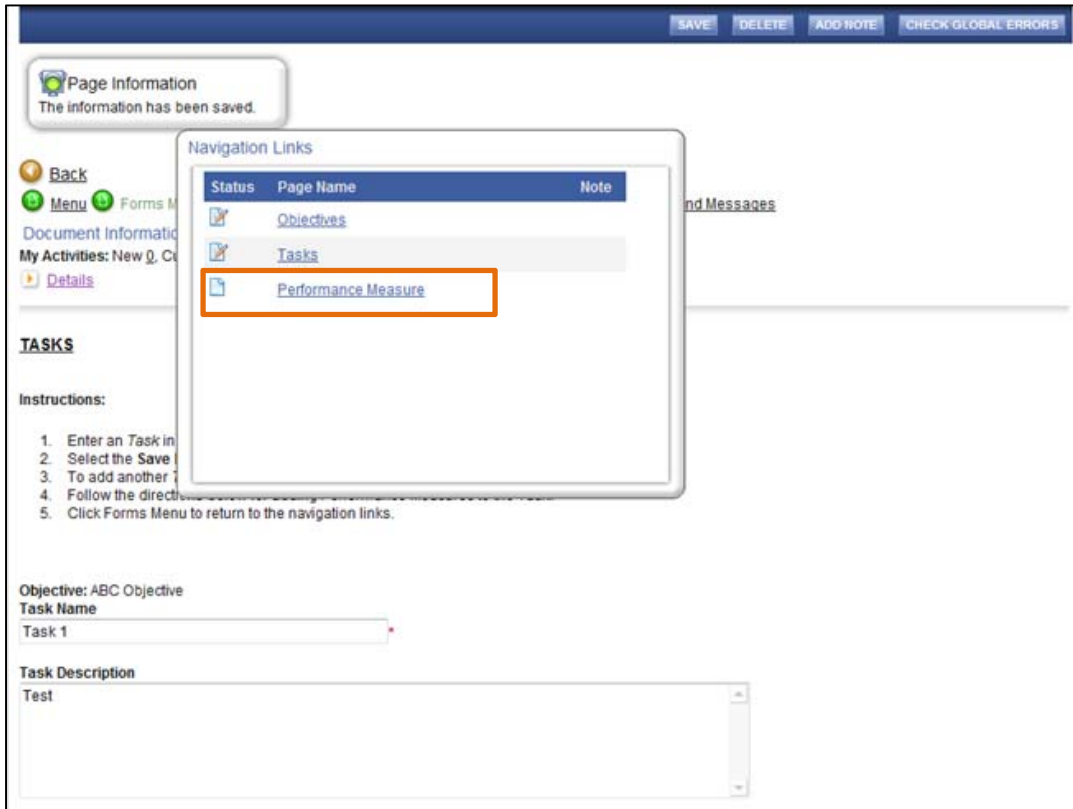
1. Enter an Task in the field provided below.
2. Select the Save button.
3. To add another Task, select the Add button above.
4. Follow the directions below for adding Performance Measures to the Task.
5. Click Forms Menu to return to the navigation links.

Objective: ABC Objective

Task Name

Task Description

- Hover over the Forms Menu and click on the Performance Measure link to enter Performance Measure(s) for the Task(s) you created.



- Enter all the required information and click on the save button on the Performance Measure screen.



New York State
Grants Gateway

[Home](#) | [Grant Opportunity Portal](#) | [Applications](#) | [Contracts](#)

[Training Materials](#) | [Organization\(s\)](#) | [Profile](#) | [Logout](#)

[SAVE](#) [CHECK GLOBAL ERRORS](#)

[Back](#)
[Menu](#) [Forms Menu](#) [Status Changes](#) [Management Tools](#) [Related Documents and Messages](#)

Document Information: [DOL01-sss-2014-00001](#)
 My Activities: New 0, Current 0, Review 0, Assigned 0
[Details](#)

PERFORMANCE MEASURE

Instructions:

1. Enter a *Performance Measure* in the field(s) provided below.
2. Select the **Save** button.
3. To add another *Performance Measure*, select the **Add** button above.
4. Click Forms Menu to return to the navigation links.

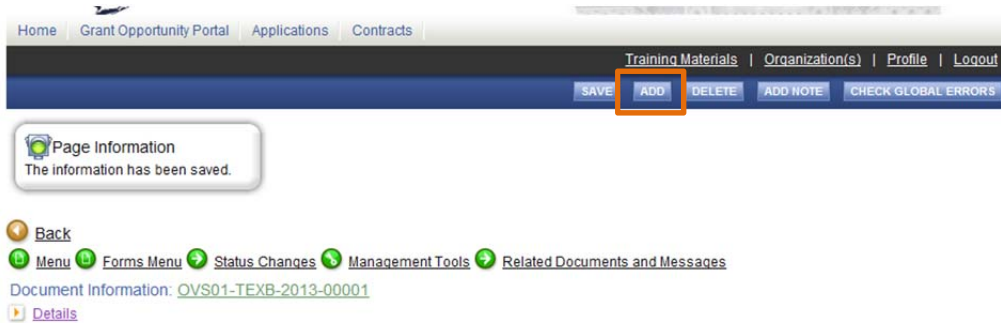
Objective: ABC Objective
Task: Task 1

Performance Measure Name

Integer

Upload
 [Browse...](#)


- Once one set of Objectives, Tasks, and Performance Measures are complete, you can add a second set. Click on the Add Button:



[Home](#) | [Grant Opportunity Portal](#) | [Applications](#) | [Contracts](#)

[Training Materials](#) | [Organization\(s\)](#) | [Profile](#) | [Logout](#)

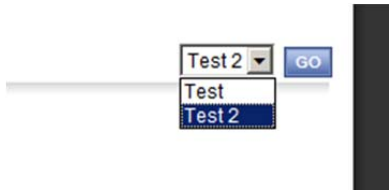
[SAVE](#) [ADD](#) [DELETE](#) [ADD NOTE](#) [CHECK GLOBAL ERRORS](#)

 **Page Information**
 The information has been saved.

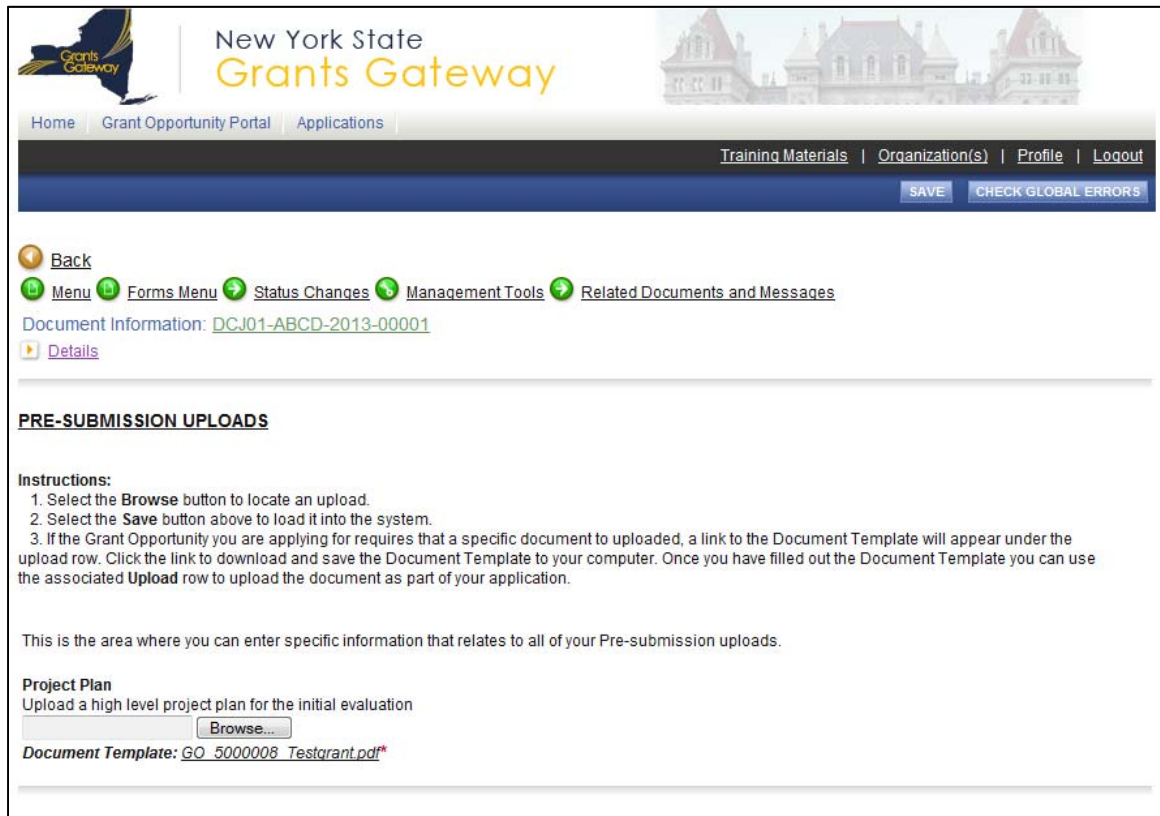
[Back](#)
[Menu](#) [Forms Menu](#) [Status Changes](#) [Management Tools](#) [Related Documents and Messages](#)

Document Information: [OVS01-TEXB-2013-00001](#)
[Details](#)

- Once a second set is created, you can toggle between the two to work on them by clicking the dropdown with the Go button (this will appear after the second set is created). Additional sets of Objectives, Tasks and Performance Measures are created in the same way.



6.2.11. The next Section in the Online Grant Application is Pre-Submission Uploads. Pre-Submission uploads (if present) may require you to upload documents specified by the funding agency.



New York State
Grants Gateway

Home | Grant Opportunity Portal | Applications

Training Materials | Organization(s) | Profile | Logout

SAVE CHECK GLOBAL ERRORS

Back

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Document Information: [DCJ01-ABCD-2013-00001](#)

[Details](#)

PRE-SUBMISSION UPLOADS

Instructions:

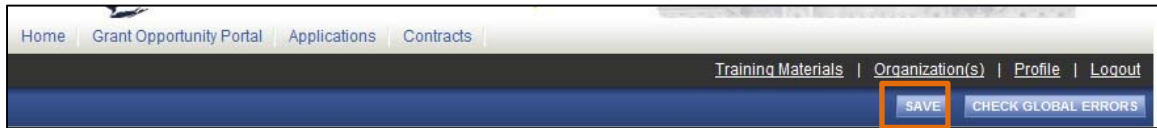
1. Select the **Browse** button to locate an upload.
2. Select the **Save** button above to load it into the system.
3. If the Grant Opportunity you are applying for requires that a specific document to be uploaded, a link to the Document Template will appear under the upload row. Click the link to download and save the Document Template to your computer. Once you have filled out the Document Template you can use the associated **Upload** row to upload the document as part of your application.

This is the area where you can enter specific information that relates to all of your Pre-submission uploads.

Project Plan
Upload a high level project plan for the initial evaluation

Document Template: [GO_5000008_Testgrant.pdf](#)*

6.2.11.1. Enter all the required information and click on the save button on the Pre-submission upload screen. Please note there is a 10MB maximum size for any uploads.

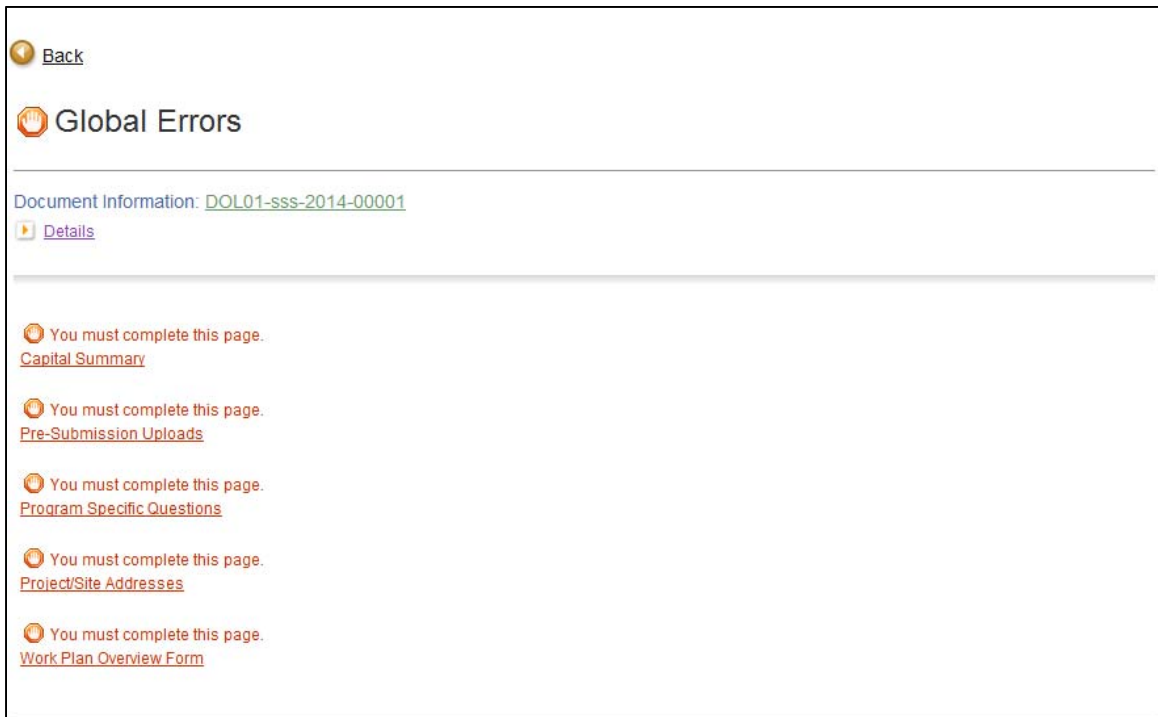


6.2.12. Check for Global Errors

6.2.12.1. After All the required forms are completed and saved successfully in the online application, click on the CHECK GLOBAL ERROR link, and the system will check your application for completeness.

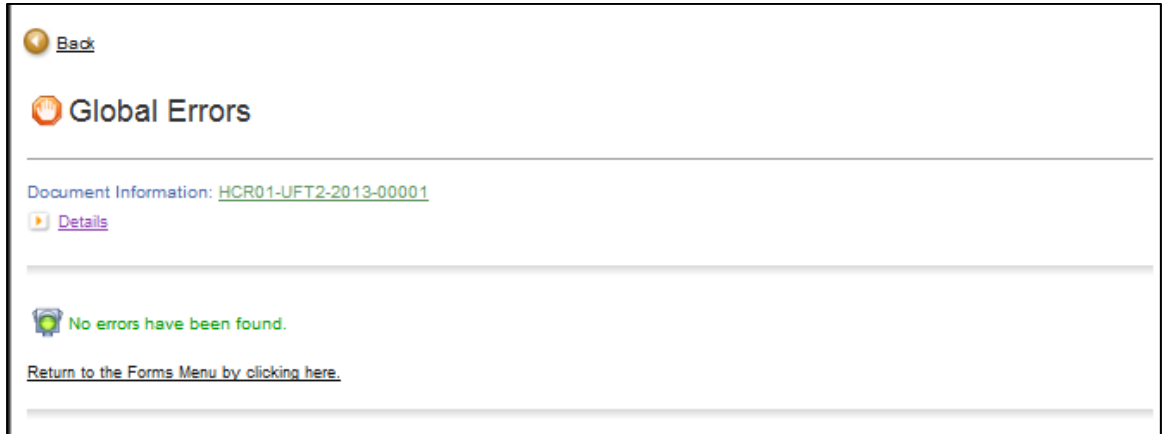
6.2.12.2. You also can run the global error check at any time in the application process to see if any errors or omissions exist.

6.2.12.3. The system will display an error if you have missed one or more required section in your application.



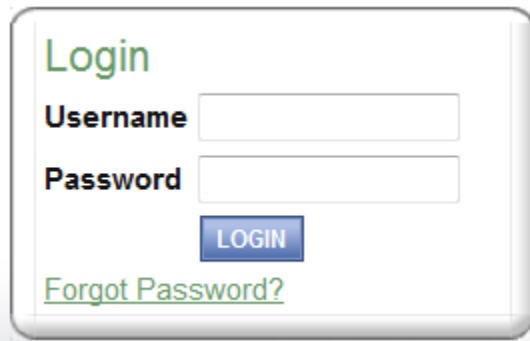
6.2.12.4. Once there are no Global Errors found in the online application, it is ready to be submitted.

6.2.12.5. The global error check will also alert you to any pages that may need to be reviewed if you changed a page that is related to it.

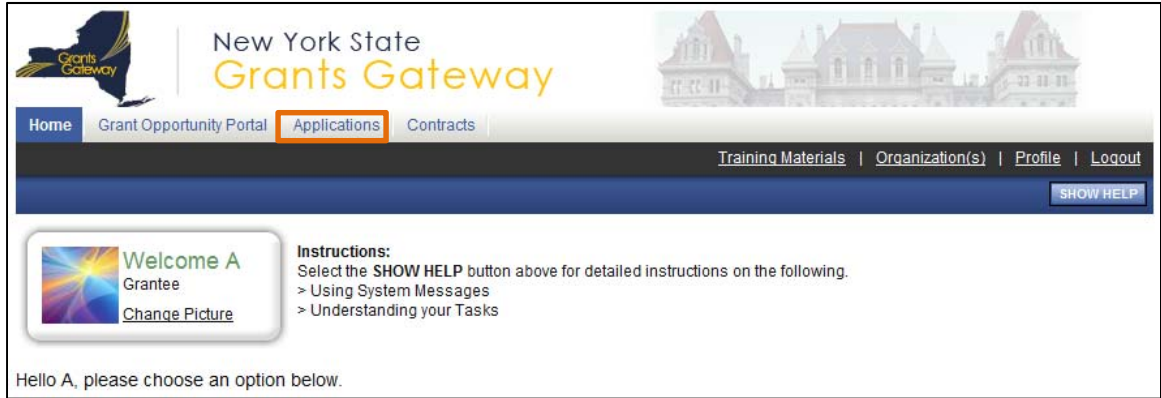


6.3. Retrieve Application

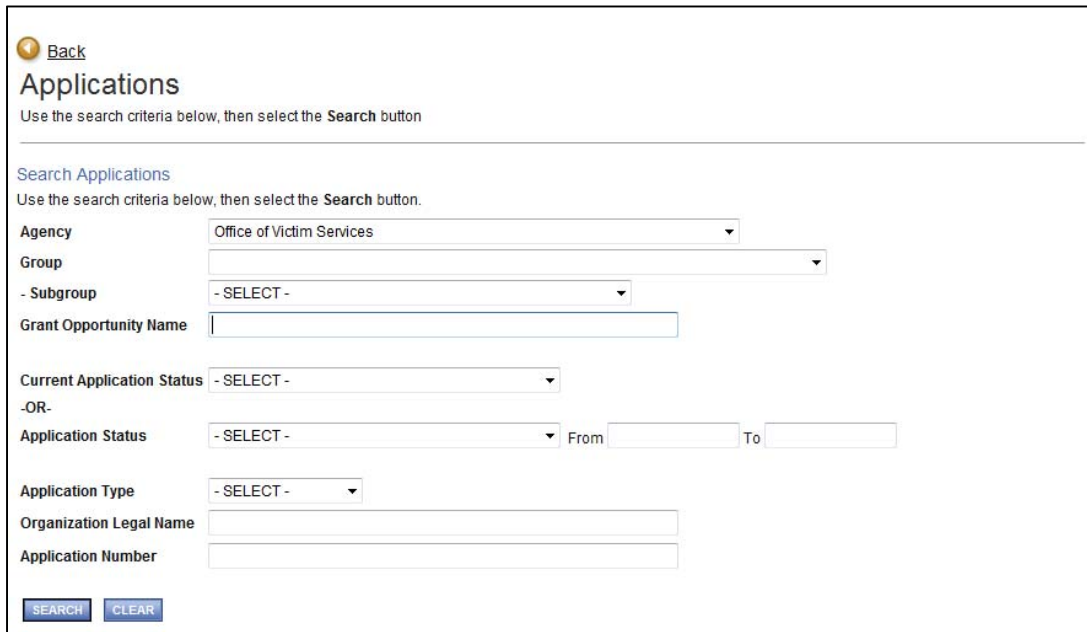
6.3.1. The grantee organization can retrieve the application they have already started. Start by logging in to Grants Gateway using your Gateway credentials.



6.3.2. Once you are logged in to Grants Gateway, click on the Applications link located on top of your home screen.



6.3.3. Enter information in the search fields to narrow your results or click directly on search to see all the online applications in the Grants Gateway.



6.3.4. Select the **SEARCH** button.



6.3.5. Click the **Application Number** to retrieve the application and start working on it.

Search Results

Export Results to Sort by:

Number of Results 1

Application Number	Grant Opportunity Name	Application Type	Organization Legal Name	Status	Start Date	End Date
DCJ01-ATI015-2015-00004	DCJS Demonstration 2015 Alternative to Incarceration Grant	Competitive	Zohra NFP	Application in Process	Mar 26, 2014	

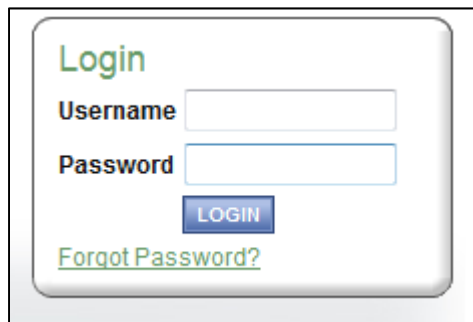
6.3.6. It is very important you do not click “Apply for Grant Opportunity” again in the system when looking for an existing application, as it will create duplicate applications (if the RFP allows more than one Application per grantee). Once an application has been initiated, you should continue using that one by utilizing the application search function.

6.4. Cancel Application

In the Grants Gateway system, any application which is in “Application in Process” status can be cancelled. Roles mentioned below can change the application status to “Application Cancelled”

- Grantee Contract Signatory
- Grantee System Administrator

6.4.1. Start by logging in to Grants Gateway.



Login

Username

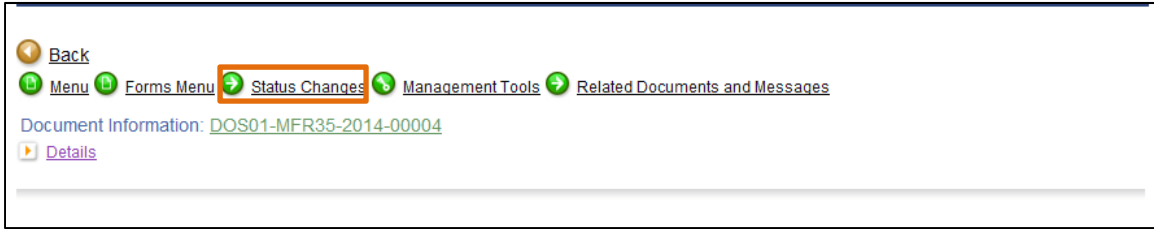
Password

[Forgot Password?](#)

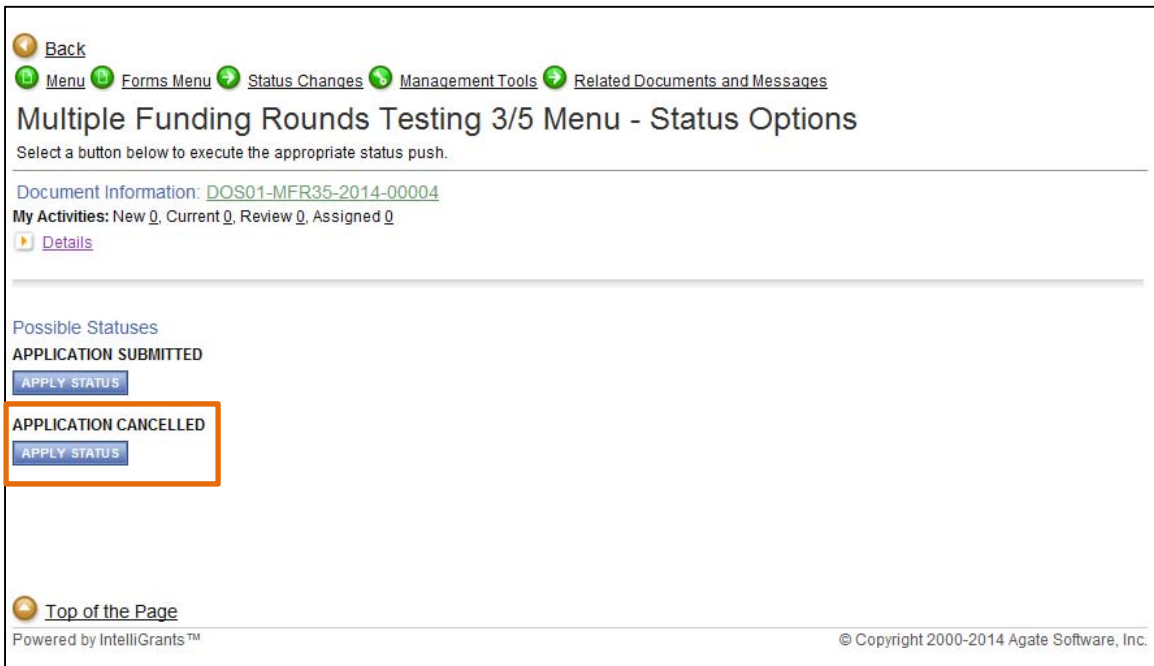
6.4.2. Retrieve the application you would like to cancel.

Note: Please refer section 6.3 on how to Retrieve an Application.

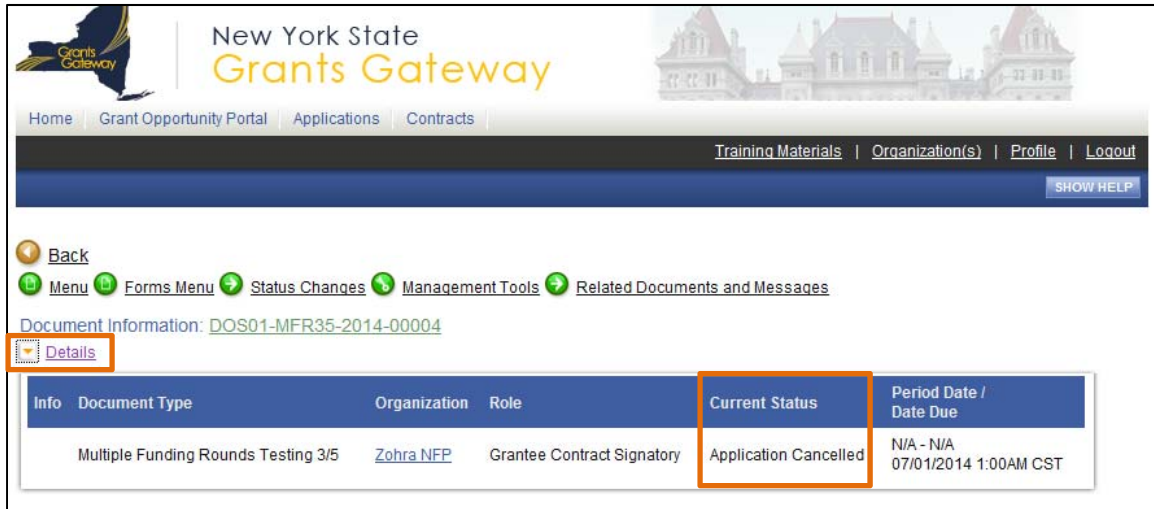
6.4.3. Click on the Status Changes link.



6.4.4. Click on the APPLY STATUS button located under APPLICATION CANCELLED.



6.4.5. To confirm the status of your Application click on the Details link. The current Status of the application would be “Application Cancelled”.



New York State Grants Gateway

Home | Grant Opportunity Portal | Applications | Contracts

Training Materials | Organization(s) | Profile | Logout

SHOW HELP

Back

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

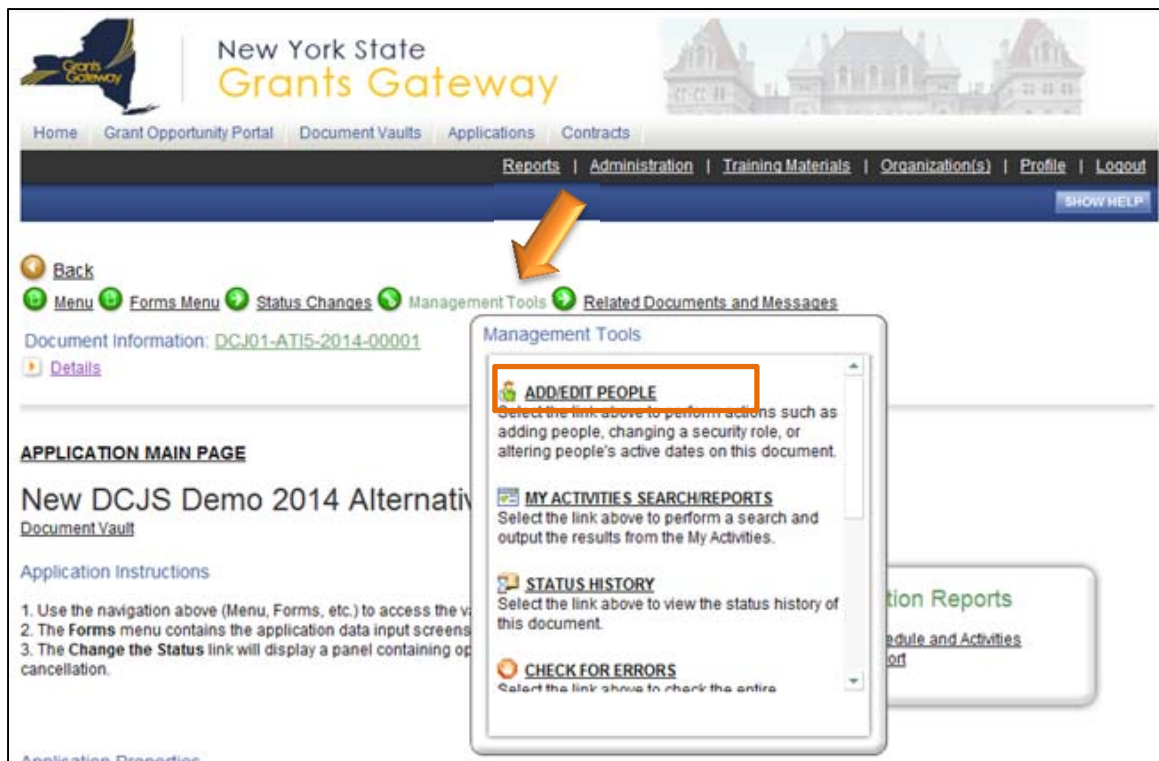
Document Information: [DOS01-MFR35-2014-00004](#)

Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Multiple Funding Rounds Testing 3/5	Zohra NFP	Grantee Contract Signatory	Application Cancelled	N/A - N/A 07/01/2014 1:00AM CST

6.5. Add/Edit People tool

The Grantee can add other people from his/her organization to the application they are working on using the Add/Edit People tool located in Management Tools in the application. If you add someone to your application either to **Review the Application** or to **Submit the Application**, the moment you add them, it will become a task for that person and will be displayed in their task box.



New York State Grants Gateway

Home | Grant Opportunity Portal | Document Vaults | Applications | Contracts

Reports | Administration | Training Materials | Organization(s) | Profile | Logout

SHOW HELP

Back

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Document Information: [DCJ01-AT15-2014-00001](#)

Details

APPLICATION MAIN PAGE

New DCJS Demo 2014 Alternati
Document Vault

Application Instructions

1. Use the navigation above (Menu, Forms, etc.) to access the v
2. The Forms menu contains the application data input screens
3. The Change the Status link will display a panel containing op
cancellation.

Application Properties

Management Tools

- 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

Application Reports

chedule and Activities
ort

6.5.1. A list of users in your organization will appear. You can select the system role for the person to whom you want to assign that particular role.

Document Information: [DOS01-TFR-2014-00001](#)
 My Activities: New , Current , Review , Assigned
[Details](#)

Current People Assigned

<input type="checkbox"/>	Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/>	A ZohraGrantee Email	Zohra NFP (Grantee)	Grantee	3/31/2014 <input type="text"/>	Grant System
<input type="checkbox"/>	A ZohraGCS Email	Zohra NFP (Grantee Contract Signatory)	Grantee Payment Signatory ▼	<input type="text"/>	
<input type="checkbox"/>	Testing ContractSig Email	Zohra NFP (Grantee Contract Signatory)	Grantee Contract Signatory ▼	<input type="text"/>	

6.5.2. You can add users by selecting the check box next to their name and selecting the **Save** button at the top of the page.

Home | Grant Opportunity Portal | Applications | Contracts | Training Materials | Organization(s) | Profile | Logout

SAVE CHECK GLOBAL ERRORS SHOW HELP

<input checked="" type="checkbox"/>	A ZohraGCS Email	Zohra NFP (Grantee Contract Signatory)	Grantee Contract Signatory ▼	<input type="text"/>
<input checked="" type="checkbox"/>	Testing ContractSig Email	Zohra NFP (Grantee Contract Signatory)	Grantee Payment Signatory ▼	<input type="text"/>

6.6. Submit an Online Application

Note: Please refer to Section 4.1 – “Grantee Roles” to determine which Grantee roles can submit the application.

6.6.1. In order to submit your online application, click on the Status Changes link located top of your application main page.



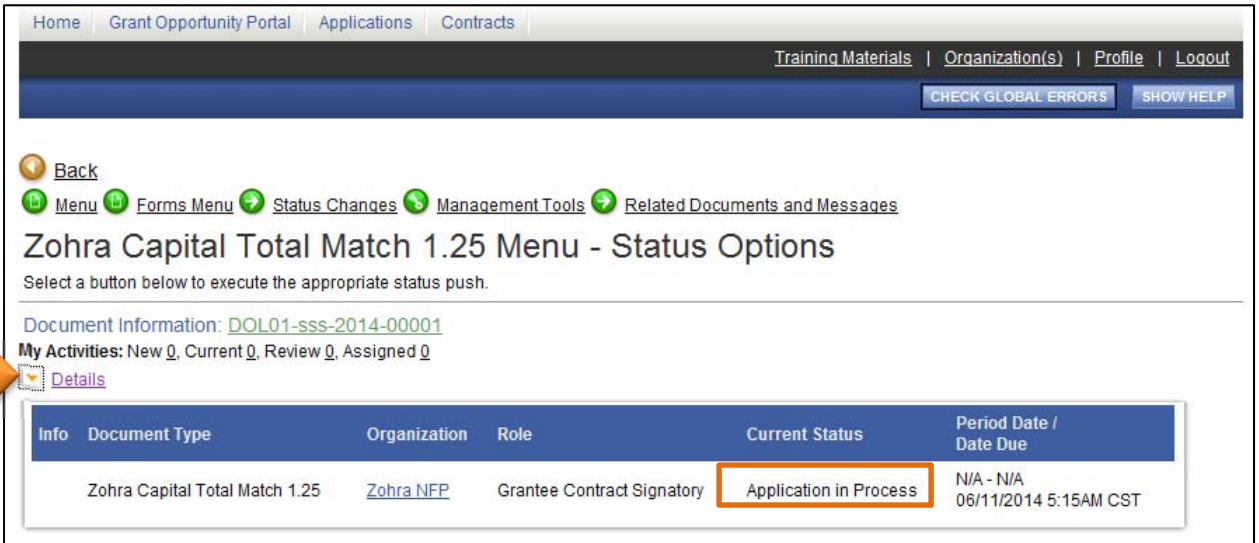
6.6.2. Click on the APPLY STATUS button located under APPLICATION SUBMITTED.



6.6.3. Prior to final submission, you will need to certify the agreement as stated. Please read the paragraph closely and click on I agree. If you select I DO NOT AGREE, your application will not be submitted. Click I AGREE to submit the application.

6.6.4. Once your application is submitted you are returned to the Application main page. If you hover over the status changes link you will see that there are no available status options at this time.

6.6.5. To check the current status of your Application click on the Details link. When you are working on your Application, The application status would say “Application in Process”.



Home | Grant Opportunity Portal | Applications | Contracts

Training Materials | Organization(s) | Profile | Logout

CHECK GLOBAL ERRORS SHOW HELP

Back

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Zohra Capital Total Match 1.25 Menu - Status Options

Select a button to execute the appropriate status push.

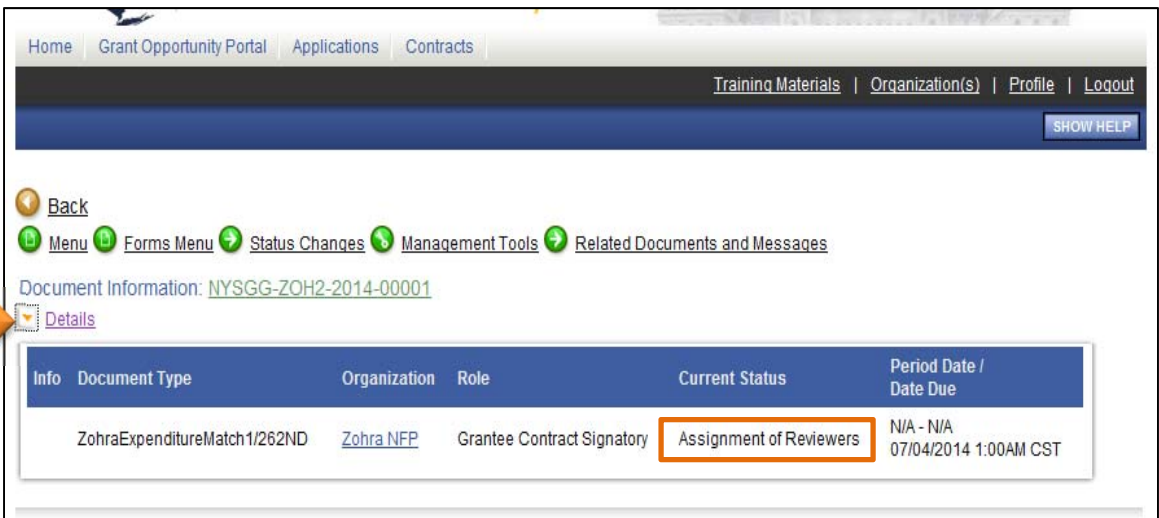
Document Information: [DOL01-sss-2014-00001](#)

My Activities: New 0, Current 0, Review 0, Assigned 0

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Zohra Capital Total Match 1.25	Zohra NFP	Grantee Contract Signatory	Application in Process	N/A - N/A 06/11/2014 5:15AM CST

6.6.6. After you Submit your application, the application status in the Details grid would say “Assignment of Reviewers.” Congratulations! This status means you have successfully submitted an application.



Home | Grant Opportunity Portal | Applications | Contracts

Training Materials | Organization(s) | Profile | Logout

SHOW HELP

Back

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Document Information: [NYSGG-ZOH2-2014-00001](#)

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	ZohraExpenditureMatch1/262ND	Zohra NFP	Grantee Contract Signatory	Assignment of Reviewers	N/A - N/A 07/04/2014 1:00AM CST

6.6.7. If the funding agency has decided to have Bid Lock on the application, after you submit your application, the application status in the Details



grid would say “Lock Bid Assignment of Reviewers.” Congratulations! This status means you have successfully submitted an application.

The screenshot shows a web application interface with a navigation menu at the top. The main content area displays document information for 'DOL01-sss-2014-00001'. Below this is a table with the following data:

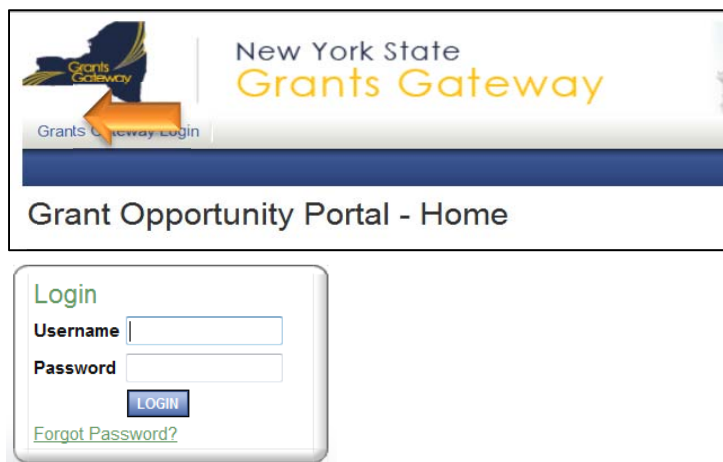
Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Zohra Capital Total Match 1.25	Zohra NFP	Grantee Contract Signatory	Lock Bid Assignment of Reviewers	N/A - N/A 06/11/2014 5:15AM CST

7. Contract Development Process

7.1. Editing Contract Information

Once the Program Manager reviews the contract related information in the Grants Gateway, they may send it to grantee for any needed changes. This section explains how to make those changes.

7.1.1. Log in to Grants Gateway using your credentials.




The screenshot shows the New York State Grants Gateway login page. At the top left is the New York State logo with the text 'NEW YORK STATE OF OPPORTUNITY.' and 'Grants Gateway'. To the right of the logo is the text 'New York State Grants Gateway'. Below this is a blue horizontal bar with the text 'Grant Opportunity Portal - Home'. The main content area contains a 'Login' form with the following elements: a 'Login' heading, a 'Username' label followed by a text input field, a 'Password' label followed by a text input field, a blue 'LOGIN' button, and a 'Forgot Password?' link.

7.1.2. Click on the Open Tasks button located under My Tasks to view available task(s) on the Grants Gateway Home screen (This might take few seconds to open up).

Note: When the contract is in the status of “Contract Information Requested (PM),” the user who initiated the application will get a Task in their Task box in the Grants Gateway. This could be any person in your organization with the role of Grantee, Grantee Contract Signatory, or Grantee System Administrator.

My Tasks
 You have 8 new tasks.
 You have 1 tasks that are critical.
 Select the **Open Tasks** button below to view your active tasks.



Powered by IntelliGrants™ © Copyright 2000-2014 Agate Software, Inc.

7.1.3. Select the Name of the contract in the status of “Contract Info Requested (PM)” from the Tasks list.

Important Note: You can work on any contract within your organization (even ones not specifically assigned to you) if you have the Grantee, Grantee System Administrator or Grantee Contract Signatory role in the Grants Gateway System. Please see Section 11 of this document which describes how to search for a contract.

My Tasks
 Export Results to Sort by:

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Application/Contract	Zara Child 1 NFP	PDV01-0925-2014-00002	Contract Info Requested (PM)	9/29/2014	9/25/2015
	Application/Contract	Zara Child 1 NFP	PDV01-0918-2014-00001	Grantee Contract Signature Required	9/19/2014	9/30/2015
	Application/Contract	Zara Child 1 NFP	PDV01-0825-2-2014-00001(2)	Grantee Contract Signature Required	8/26/2014	
	Application/Contract	Zara Child 1 NFP	PDV01-0915-2014-00001(2)	Contract Info Requested New Period (PM)	9/16/2014	

The system will display the **Contract Main Page** where you can review contract related information such as:

- Contract Properties
- Period Financial Summary
- Period Reports

Note: Please refer to Section: 13 of this document to understand the Period Schedule Report.

Application Reports (only for competitive grant opportunities)

[Back](#)

[Menu](#)
[Forms Menu](#)
[Status Changes](#)
[Management Tools](#)
[Related Documents and Messages](#)

Document Information: [PDV01-0925-2014-00002](#)

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application/Contract	Zara Child 1 NFP	Grantee Contract Signatory	Contract Info Requested (PM)	09/01/2014 - 08/31/2015 09/25/2015 1:00AM EST

CONTRACT MAIN PAGE (GRANTEE)

Contract Properties

Contract Number	Contract Term From	Contract Term To	Contract Period From	Contract Period To	Contract Type	SFS Contract
PDV01-T00019GG-1310000	09/01/2014	08/31/2018	09/01/2014	08/31/2015	Simplified Renewal Agreement	No

Period 1: 09/01/2014-08/31/2015

Period Financial Summary

Period Total	\$50,000.00
--------------	-------------

Period Reports

- [Period Schedule Report](#)
- [Modification History](#)
- [Modification Schedule Report](#)

Application Reports
(Competitive Opportunities only)

- [Schedule and Activities Report](#)

7.1.4. Edit the required contract information by selecting the appropriate option in the Forms Menu and adding/editing the forms as requested by the State Agency user. Items that can be edited include:

- Program Information
- Budget Forms
- Work Plan
- Post-Submission Uploads



New York State Grants Gateway

Home | Grant Opportunity Portal | Applications | Contracts | Payments | Tasks | Training Materials | Organization(s) | Profile | Logout

Back | **Forms Menu** | Status Changes | Management Tools | Related Documents and Messages

Application/Contract Menu - Forms

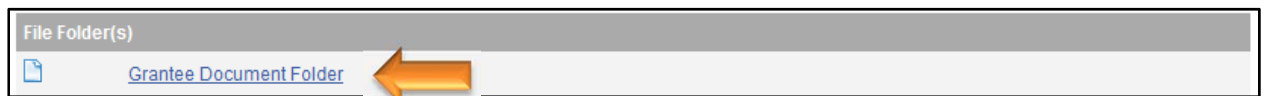
Please complete all required forms below.

Document Information: [PDV01-0925-2014-00002](#)

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application/Contract	Zara Child 1 NFP	Grantee Contract Signatory	Contract Info Requested (PM)	09/01/2014 - 08/31/2015 09/25/2015 1:00AM EST

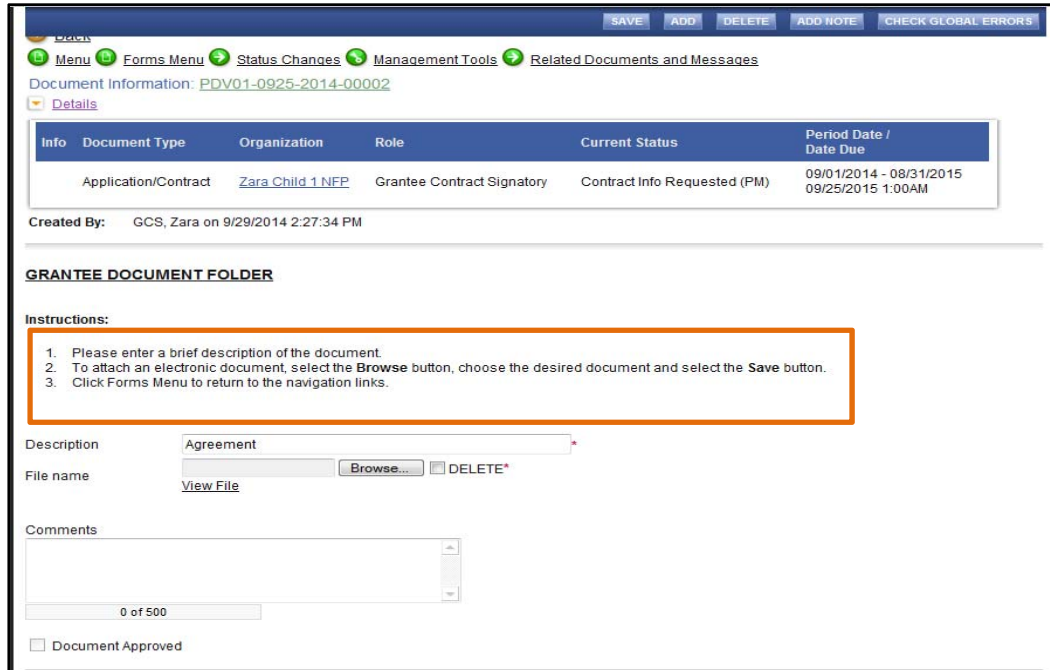
7.1.5. The Grantee Document Folder (located at the bottom of the Forms Menu in File Folder(s) section) can be used to upload any contract related document(s), if requested by the State.



File Folder(s)

[Grantee Document Folder](#)

7.1.5.1. Follow the instructions on the screen to upload a document to this folder.



Document Information: PDV01-0925-2014-00002

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application/Contract	Zara_Child_1.NFP	Grantee Contract Signatory	Contract Info Requested (PM)	09/01/2014 - 08/31/2015 09/25/2015 1:00AM

Created By: GCS, Zara on 9/29/2014 2:27:34 PM

GRANTEE DOCUMENT FOLDER

Instructions:

1. Please enter a brief description of the document.
2. To attach an electronic document, select the **Browse...** button, choose the desired document and select the **Save** button.
3. Click Forms Menu to return to the navigation links.

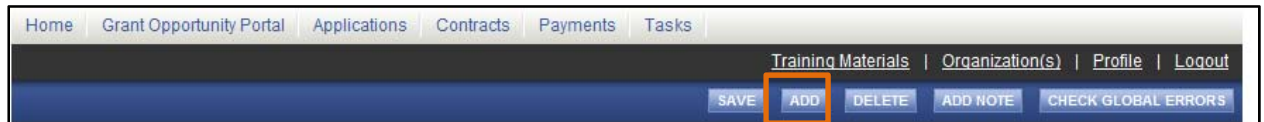
Description:

File name: DELETE*

Comments:

Document Approved

7.1.5.2. To upload more than one document to this folder, click on the **ADD** button located in the blue ribbon at top of the screen.



Home | Grant Opportunity Portal | Applications | Contracts | Payments | Tasks | Training Materials | Organization(s) | Profile | Logout

7.1.5.3. To delete a document from Grantee Document Folder, select the **DELETE** checkbox next to the file and click on the **SAVE** button located in the blue ribbon at top of the screen.

Home | Grant Opportunity Portal | Applications | Contracts | Tasks

Training Materials | Organization(s) | Profile | Logout

SAVE ADD DELETE ADD NOTE CHECK GLOBAL ERRORS

Back

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Document Information: PDV01-0925-2014-00002

[Details](#)

GRANTEE DOCUMENT FOLDER

Instructions:

1. Please enter a brief description of the document.
2. To attach an electronic document, select the **Browse** button, choose the desired document and select the **Save** button.
3. Click Forms Menu to return to the navigation links.

Description: Agreement

File name: Browse... DELETE*

[View File](#)


Comments


0 of 500

Document Approved

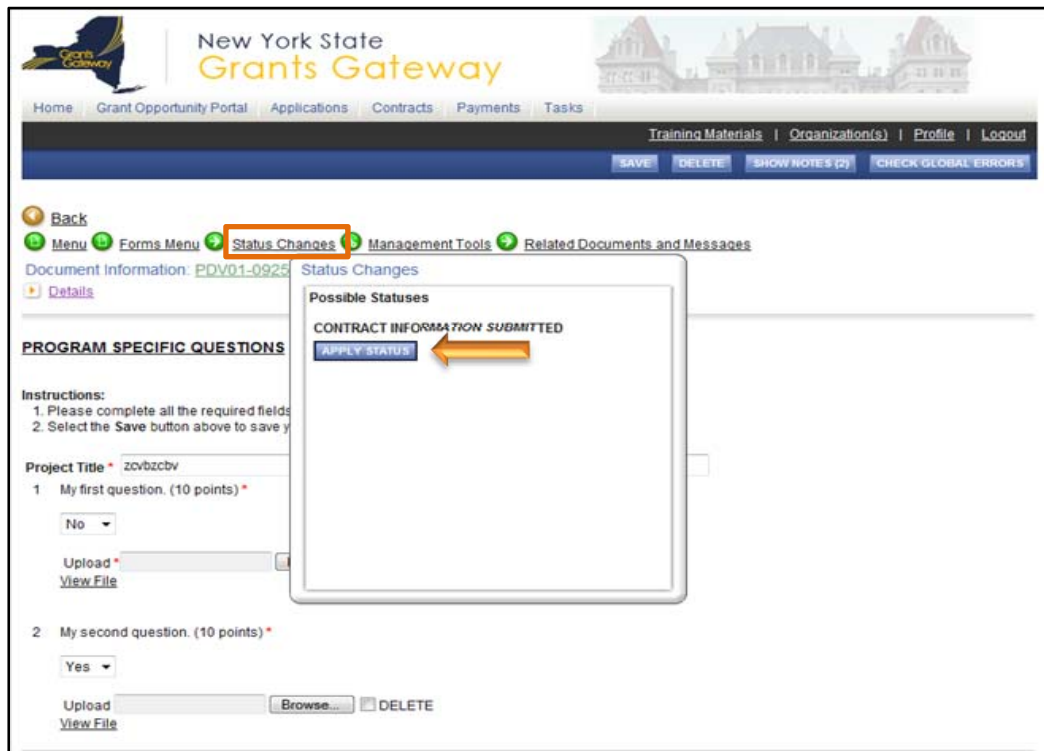
- 7.1.6. At the bottom of the Forms Menu, you will be able to see contract related forms such as:
- Contract Versions:** This section will be updated once the approval process begins in the Grants Gateway. For instance, a version that is signed by the Grantee Contract Signatory will be stored as a PDF file and displayed here.
- Contract Preview:** In this section, the system will display all the current (real time) contract related information in a preview of the Master Grant Contract.

Contract

 [Contract Versions](#)

 [Contract Preview](#)

- 7.1.7. The Add Notes tool in the grants gateway is a very useful tool. You can use this tool to attach a note to any of the forms for your own use (think of it as a “post-it” note). Please refer to Section 9 of this document for instructions on how to add a note to forms.
- 7.1.8. Once the contract is ready to be reviewed, the Grantee, Grantee Contract Signatory or Grantee System Administrator can submit the contract back to the Program Manager for review by changing the contract status to **“Contract Information Submitted”** located in the Status Changes.



8. Contract Approval Process

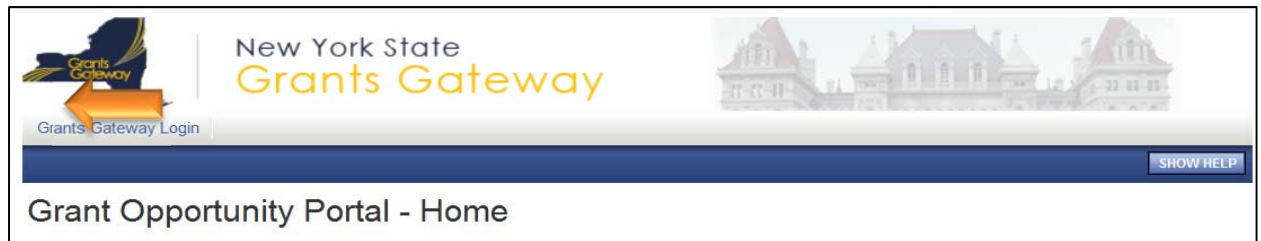
Once the contract has passed through the Contract Development loop (Program Manager Review, Contract Manager Review, and Internal Review, if applicable) in the Grants Gateway, the contract approval process can begin.

The Contract Manager has reviewed the contract and has determined that there are no more changes needed.

The Contract Manager has changed the status to **“Grantee Contract Signature Required”** to obtain the grantee’s signature.

8.1. Log in to the Grants Gateway with your Grantee Contract Signatory or Grantee System Administrator credentials.

(Note: To add a Grantee Contract Signatory or Grantee System Administrator for the contract please follow the Add/Edit People process shown in Section 10.)



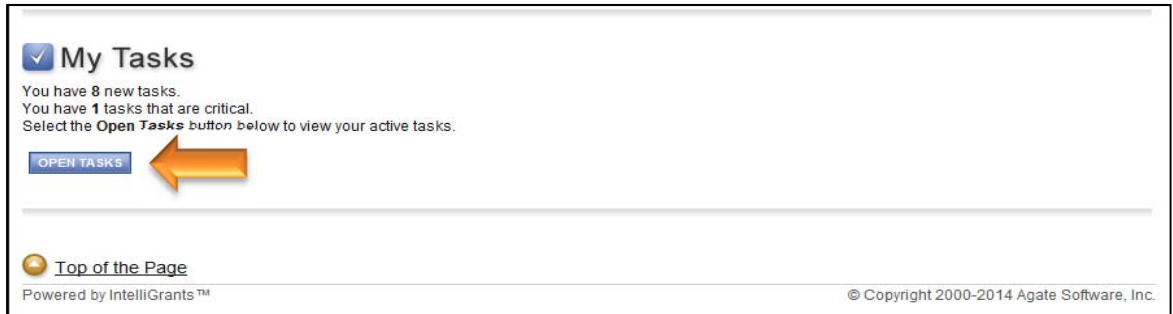
Login

Username

Password

[Forgot Password?](#)

8.2. Click on Open Tasks button located under My Tasks to view available task(s).



8.2.1. Select the name of the contract in the status of “Grantee Contract Signature Required” in the tasks list.

Important Note: You can sign any contract within your organization if you have the role of Grantee System Administrator or Grantee Contract Signatory in the Grants Gateway System, even if it’s not assigned to you. Please see Section 11 of this document on how to search for a contract.



My Tasks

Export Results to [Screen](#) Sort by: [-- Select --](#) [GO](#)

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Application/Contract	Zara Child 1 NFP	PDV01-0925-2014-00002	Grantee Contract Signature Required	10/5/2014	9/25/2015
	Application/Contract	Zara Child 1 NFP	PDV01-0918-2014-00001	Grantee Contract Signature Required	9/19/2014	9/30/2015
	Application/Contract	Zara Child 1 NFP	PDV01-1001-2014-00001	Grantee Contract Signature Required	10/5/2014	10/1/2015
	Application/Contract	Zara Child 1 NFP	PDV01-0825-2-2014-00001(2)	Grantee Contract Signature Required	8/26/2014	
	Application/Contract	Zara Child 1 NFP	PDV01-0915-2014-00001(2)	Contract Info Requested New Period (PM)	9/16/2014	

[CLOSE TASKS](#)

8.3. The system will display the Contract Main Page where you can see contract related information such as:

- Contract Properties
- Period Financial Summary
- Period Reports
- Application Reports (only for competitive grant opportunities)

[Training Materials](#) | [Organization\(s\)](#) | [Profile](#) | [Logout](#)

SHOW HELP

[Back](#)

[Menu](#)
[Forms Menu](#)
[Status Changes](#)
[Management Tools](#)
[Related Documents and Messages](#)

Document Information: [PDV01-0925-2014-00002](#)

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application/Contract	Zara Child 1 NFP	Grantee Contract Signatory	Grantee Contract Signature Required	09/01/2014 - 08/31/2015 09/25/2015 1:00AM EST

CONTRACT MAIN PAGE (GRANTEE)

Contract Properties

Contract Number	Contract Term From	Contract Term To	Contract Period From	Contract Period To	Contract Type	SFS Contract
PDV01-T00019GG-1310000	09/01/2014	08/31/2018	09/01/2014	08/31/2015	Simplified Renewal Agreement	No

Period 1: [09/01/2014-08/31/2015](#)

Period Financial Summary

Period Total	\$50,000.00
--------------	-------------

Period Reports

- [Period Schedule Report](#)
- [Schedule History](#)
- [Modification Schedule Report](#)





Application Reports
(Competitive Opportunities only)

- [Schedule and Activities Report](#)

8.3.1. Before signing the contract make sure to review all the forms on the forms menu.

Note: During the **“Grantee Contract Signature Required”** stage, you will not be able to edit any information on any of the forms listed on forms menu. If you need to make any changes to the contract at this stage, you will have to change the contract status to **“Contract Manager Review”** using the Status Changes Tool. This will push the contract back into the Contract Development loop.

8.3.2. To preview the unsigned version of the contract, go to Forms Menu -> Contract -> Contract Versions.

Contract			
	Expenditure Budget Financial Summary	Zara GCS 9/29/2014 11:36:11 AM	
	Contract Versions 	Zohra CM 10/5/2014 12:14:12 PM	Zohra CM 10/5/2014 12:14:12 PM
	Contract Preview		

8.3.3. Click on the File Link next to Unsigned Contract to review the contract.

Note: It is the grantee’s responsibility to review the entire contract before signing it as it might have changed during the contract development process.

Home | Grant Opportunity Portal | Applications | Contracts | Tasks

Training Materials | Organization(s) | Profile | Logout

ADD NOTE | CHECK GLOBAL ERRORS

Back

Menu | Forms Menu | Status Changes | Management Tools | Related Documents and Messages

Document Information: PDV01-0925-2014-00002

Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application/Contract	Zara Child 1 NFP	Grantee Contract Signatory	Grantee Contract Signature Required	09/01/2014 - 08/31/2015 09/25/2015 1:00AM

Created By: CM, Zohra on 10/5/2014 12:14:12 PM
Modified By: CM, Zohra on 10/5/2014 12:14:12 PM

CONTRACT VERSIONS

Instructions:

- Click a link below to view the version of the contract.

Version	Role	Person	Signature Status	File Link
Unsigned Contract	N/A	N/A	Grantee Signature Required	U-PDV01-T00019GG-1310000-P1-100514.pdf 10/05/2014 12:14 AM
Grantee Signed Contract	Grantee Signatory		Grantee Signature Complete	
Agency Signed Contract	Agency Signatory		Agency Signature Complete	
Attorney General Signed Contract	AG Signatory		AG Signature Complete	
OSC Approval	External		Contract Executed	
OSC Non-Approval				

Offline Contract? No



8.4. You can sign the contract by going to Status Changes and applying the status of “Grantee Contract Signature Complete”.

Home | Grant Opportunity Portal | Applications | Contracts | Tasks

Training Materials | Organization(s) | Profile | Logout

ADD NOTE | CHECK GLOBAL ERRORS

Back

Menu | Forms Menu | Status Changes | Management Tools | Related Documents and Messages

Document Information: PDV01-0925-2014-00002

Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application/Contract	Zara Child 1 NFP	Grantee Contract Signatory	Grantee Contract Signature Required	09/01/2014 - 08/31/2015 09/25/2015 1:00AM

Created By: CM, Zohra on 10/5/2014 12:14:12 PM
Modified By: CM, Zohra on 10/5/2014 12:14:12 PM

CONTRACT VERSIONS

Instructions:

- Click a link below to view the version of the contract.

Version	Role	Person	Signature Status	File Link
Unsigned Contract	N/A	N/A	Grantee Signature Required	U-PDV01-T00019GG-1310000-P1-100514.pdf 10/05/2014 12:14 AM
Grantee Signed Contract	Grantee Signatory		Grantee Signature Complete	
Agency Signed Contract	Agency Signatory		Agency Signature Complete	
Attorney General Signed Contract	AG Signatory		AG Signature Complete	
OSC Approval	External		Contract Executed	
OSC Non-Approval				

Offline Contract? No


Possible Statuses

GRANTEE CONTRACT SIGNATURE COMPLETE
[APPLY STATUS]

CONTRACT MANAGER REVIEW NEW PERIOD
[APPLY STATUS]

CONTRACT MANAGER REVIEW MODIFICATION
[APPLY STATUS]

CONTRACT MANAGER REVIEW
[APPLY STATUS]



8.4.1. Prior to final submission, you will need to certify the agreement as stated. Please read the paragraph closely and click on I AGREE. If you select I DO NOT AGREE, your contract will not be signed and submitted back to the granting State agency. Click I AGREE to sign the contract. This will change the contract status to “Contract Package Validation” and will create a task for Contract Manager.



New York State
Grants Gateway

Home | Grant Opportunity Portal | Applications | Contracts | Tasks

Training Materials | Organization(s) | Profile | Logout

SHOW HELP

Agreement

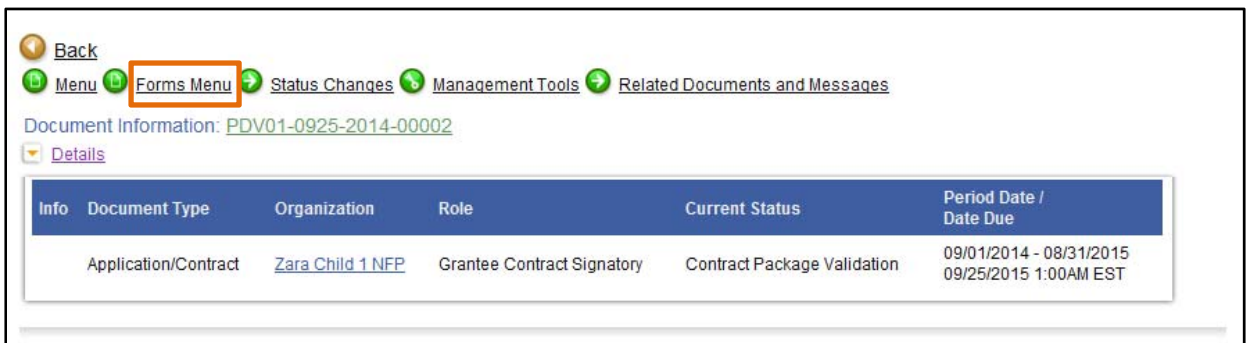
Please make a selection below to continue.

By clicking the **I Agree** button, I, acting in the capacity as Contractor, certify that I am the signing authority, or have been delegated or designated formally as the signing authority by the appropriate authority or official, and as such I do agree, and I have the authority to agree, to all of the terms and conditions set forth in the Master Contract, including all appendices and attachments. I understand that (i) payment of a claim on this Master Contract is conditioned upon the Contractor's compliance with all applicable conditions of participation in this program and (if I am acting in the capacity as a not-for profit Contractor) the accuracy and completeness of information submitted to the State of New York through the Gateway vendor prequalification process and (ii) by electronically indicating my acceptance of the terms and conditions of the Master Contract, I certify that (a) to the extent that the Contractor is required to register and/or file reports with the Office of the Attorney General's Charities Bureau ("Charities Bureau"), the Contractor's registration is current, all applicable reports have been filed, and the Contractor has no outstanding requests from the Charities Bureau relating to its filings and (b) all data and responses in the application submitted by the Contractor are true, complete and accurate. I also understand that use of my assigned User ID and Password on the State's contract management system is equivalent to having placed my signature on the Master Contract and that I am responsible for any activity attributable to the use of my User ID and Password. Additionally, any information entered will be considered to have been entered and provided at my direction. I further certify and agree that the Contractor agrees to waive any claim that this electronic record or signature is inadmissible in court, notwithstanding the choice of law provisions.

I AGREE | **I DO NOT AGREE**

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8.4.2. To view the signed copy of the contract, go to Forms Menu -> Contract -> Contract Versions.







Back | Menu | **Forms Menu** | Status Changes | Management Tools | Related Documents and Messages

Document Information: [PDV01-0925-2014-00002](#)

Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application/Contract	Zara Child 1 NFP	Grantee Contract Signatory	Contract Package Validation	09/01/2014 - 08/31/2015 09/25/2015 1:00AM EST

Contract		
	Expenditure Budget Financial Summary	Zara GCS 9/29/2014 11:36:11 AM
	Contract Versions 	Zohra CM 10/5/2014 12:14:12 PM
	Contract Preview	Zohra CM 10/5/2014 12:14:12 PM

8.4.2.1. Click on the File Link next to Grantee Signed Contract to view the signed contract.

[Back](#)
[Menu](#) [Forms Menu](#) [Status Changes](#) [Management Tools](#) [Related Documents and Messages](#)
 Document Information: [PDV01-0925-2014-00002](#)
[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application/Contract	Zara Child 1 NFP	Grantee Contract Signatory	Contract Package Validation	09/01/2014 - 08/31/2015 09/25/2015 1:00AM

Created By: CM, Zohra on 10/5/2014 12:14:12 PM
Modified By: System, Grant on 10/6/2014 10:12:15 AM

CONTRACT VERSIONS

Instructions:

- Click a link below to view the version of the contract.

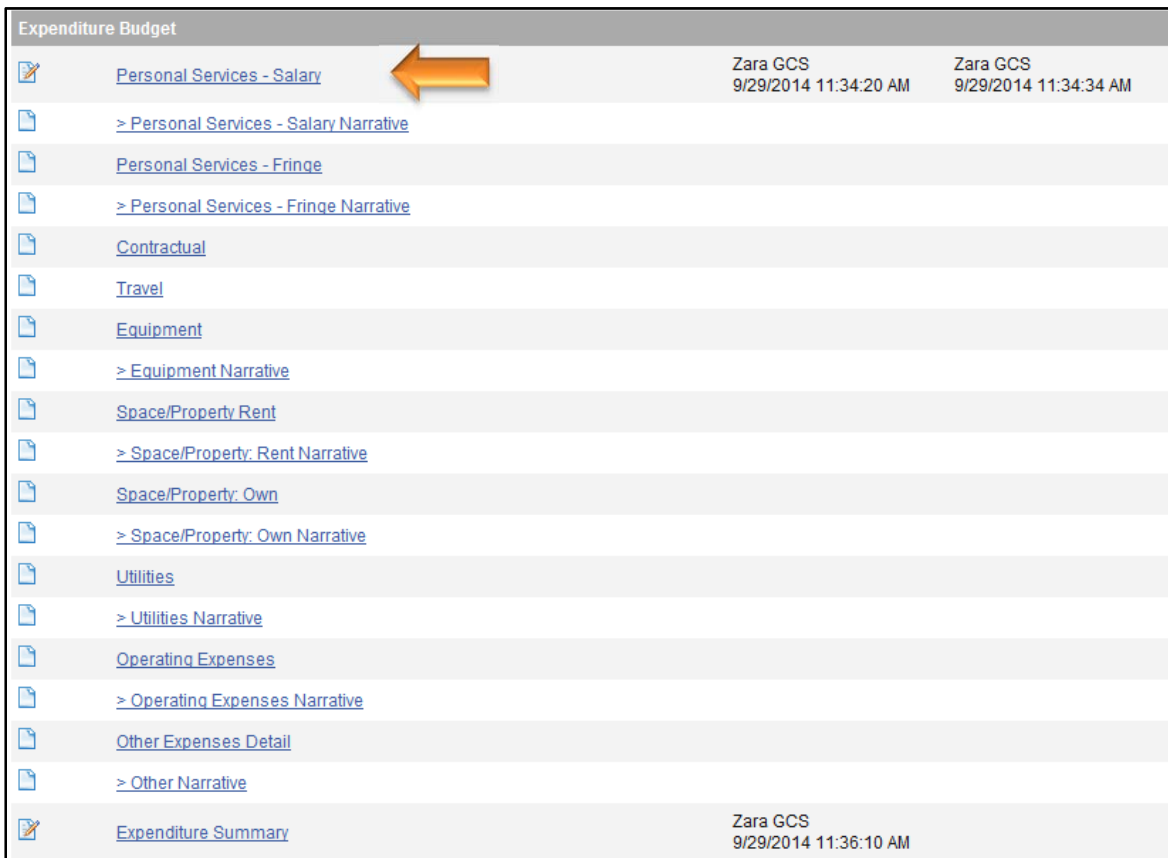
Version	Role	Person	Signature Status	File Link
Unsigned Contract	N/A	N/A	Grantee Signature Required	U-PDV01-T00019GG-1310000-P1-100514.pdf 10/05/2014 12:14 AM
Grantee Signed Contract	Grantee Signatory	Grant System	Grantee Signature Complete	G-PDV01-T00019GG-1310000-P1-100614.pdf 10/06/2014 10:12 AM
Agency Signed Contract	Agency Signatory		Agency Signature Complete	
Attorney General Signed Contract	AG Signatory		AG Signature Complete	
OSC Approval	External		Contract Executed	
OSC Non-Approval				

Offline Contract?

9. Notes Tool

The Notes Tool is a convenient way to manage discussion or direction regarding changes to contract information during the development process.

- 9.1.** To add a note to any of the contract forms, click on the form name, for example, if you want to add a note to the Personal Services – Salary form in the budget section, click on that form.



Expenditure Budget			
	Personal Services - Salary	Zara GCS 9/29/2014 11:34:20 AM	Zara GCS 9/29/2014 11:34:34 AM
	> Personal Services - Salary Narrative		
	Personal Services - Fringe		
	> Personal Services - Fringe Narrative		
	Contractual		
	Travel		
	Equipment		
	> Equipment Narrative		
	Space/Property Rent		
	> Space/Property Rent Narrative		
	Space/Property Own		
	> Space/Property Own Narrative		
	Utilities		
	> Utilities Narrative		
	Operating Expenses		
	> Operating Expenses Narrative		
	Other Expenses Detail		
	> Other Narrative		
	Expenditure Summary	Zara GCS 9/29/2014 11:36:10 AM	

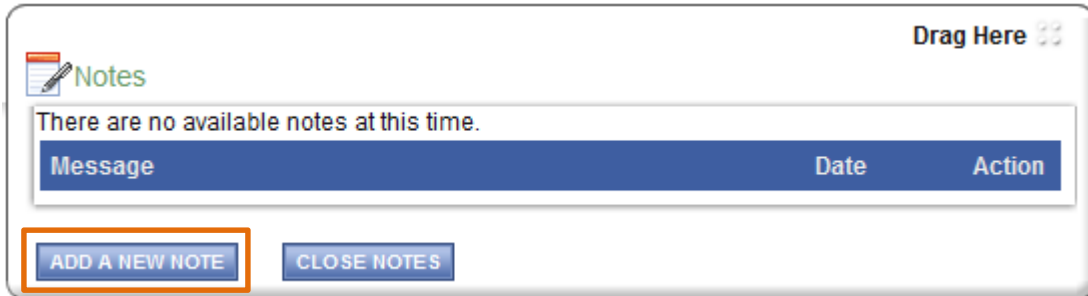
- 9.1.1. The system will display the Personal Services – Salary screen. Click on the Add Note button located at top of the screen in the blue ribbon.



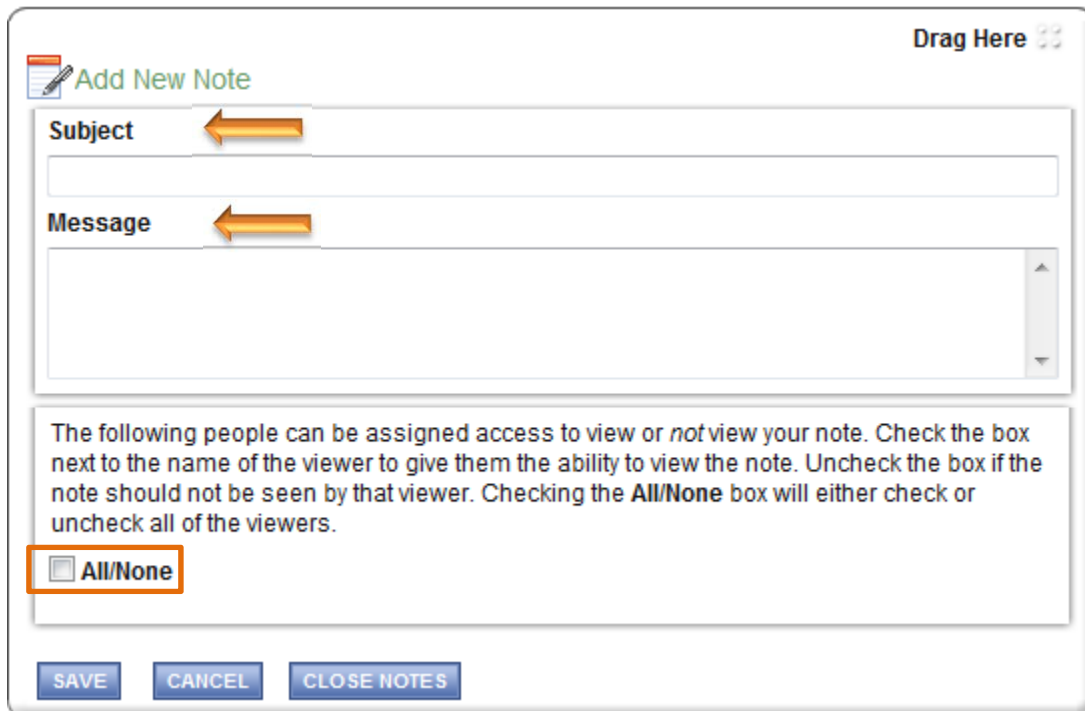
Home | Grant Opportunity Portal | Applications | Contracts | Payments | Tasks | Training Materials | Organization(s) | Profile | Logout

SAVE | ADD | DELETE | **ADD NOTE** | CHECK GLOBAL ERRORS

9.1.2. The system will display a dialog box. Click on the Add A New Note button to add a note to this form.



9.1.3. Enter a Subject and Message. At the bottom of this box you can select All/None to indicate who should be allowed to see this note. **Please be aware, if a user's name is not listed here they will NOT be able to see your note.** In that case, please contact the person directly via email or phone.

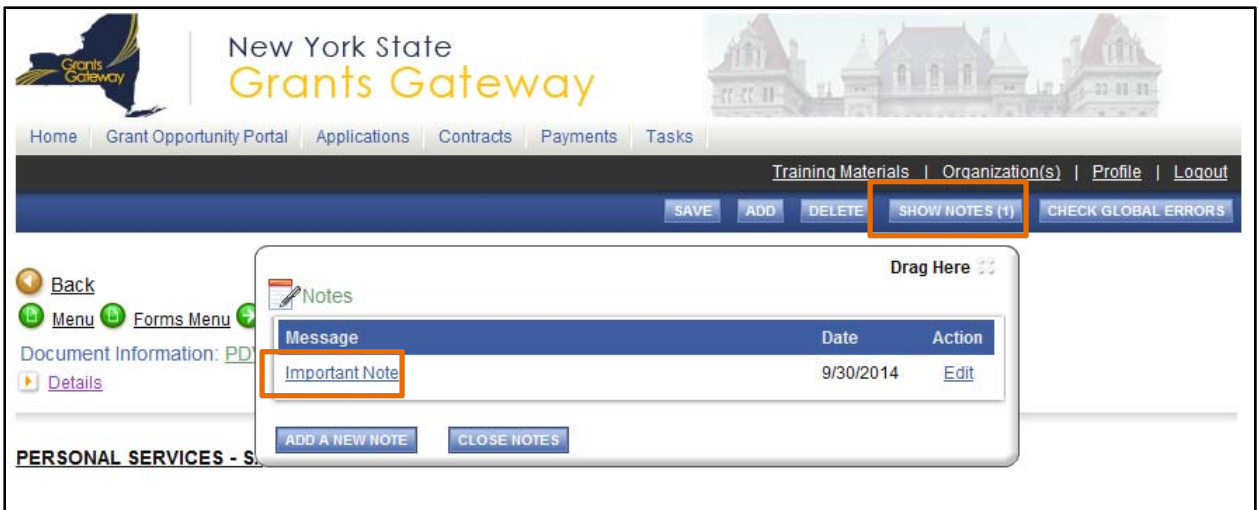


9.1.4. Save your note to allow it to be seen by selected users; Cancel the note if you have decided not to keep it. When finished, click on the Close Notes button located at the bottom of the note box.

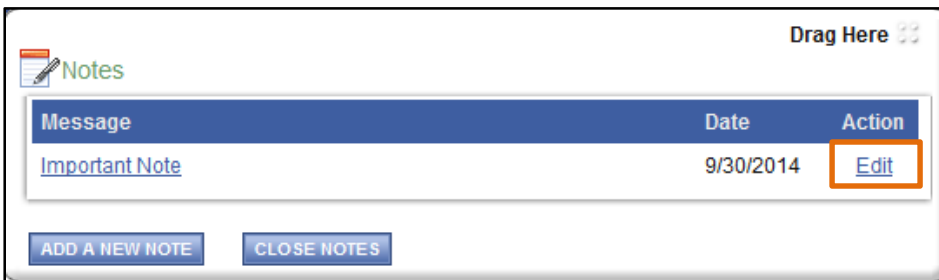
9.1.4.1. Any form which has note attached to it will show a pad and pen symbol next to that form in the Forms Menu.




9.1.5. To see an existing note on any form in the Forms Menu, click on the name of the form in the Forms Menu, and click on the Show Notes button located on at top of the page in the blue ribbon. The system will display the notes box. Click on the Subject of the note to view that particular note.



9.1.5.1. If you have created the note, the system will give you an option to edit it. Click on the Edit button to edit any particular note. Once you are done editing click the Save button to save the changes.



Drag Here ☰

 **Edit Note**

Subject

Message

Example - Editing

The following people can be assigned access to view or *not* view your note. Check the box next to the name of the viewer to give them the ability to view the note. Uncheck the box if the note should not be seen by that viewer. Checking the **All/None** box will either check or uncheck all of the viewers.

All/None

SAVE


DELETE

CANCEL

CLOSE NOTES

9.1.6. You can add more than one note to a form by clicking **Add A New Note** and saving it.

Drag Here ☰

 **Notes**

Message	Date	Action
Important Note	9/30/2014	Edit

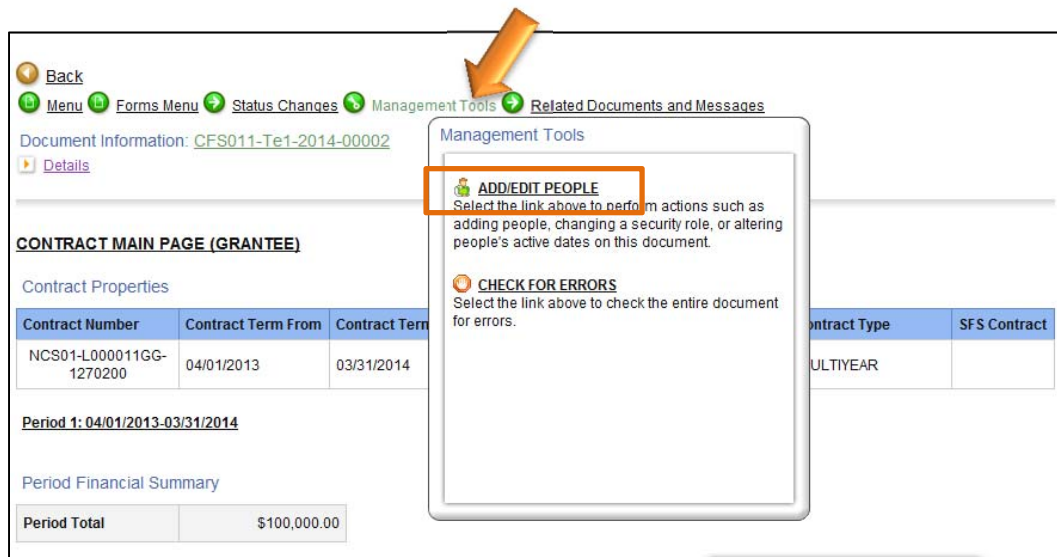
ADD A NEW NOTE

CLOSE NOTES

10. Add/Edit People Tool

The Grantee can add other people from his/her organization to the contract to sign or review it by using the Add/Edit People tool located in Management Tools on the Contract Main Page. If you add a Contract Signatory **to Sign a Contract**, the moment you add them, it will become a task for that person and will be displayed in their task box.

10.1. Click the Add/Edit People Link in the Management Tools Menu.



The screenshot shows the 'CONTRACT MAIN PAGE (GRANTEE)' interface. A 'Management Tools' pop-up menu is open, with an orange arrow pointing to the 'ADD/EDIT PEOPLE' option. The menu also includes a 'CHECK FOR ERRORS' option. The background shows contract details for document CFS011-Te1-2014-00002, including contract number NCS01-L000011GG-1270200, term from 04/01/2013 to 03/31/2014, and a period total of \$100,000.00.

10.2. A list of users in your organization will appear. You can add users by selecting the check box next to their name and selecting the Save button at the top of the page.



The screenshot shows the user management interface. At the top, there are navigation tabs: Home, Grant Opportunity Portal, Applications, Contracts, Training Materials, Organization(s), Profile, and Logout. Below these are buttons for 'SAVE', 'CHECK GLOBAL ERRORS', and 'SHOW HELP'. The main area displays a list of users:

Check Box	User Name	Organization	Role
<input checked="" type="checkbox"/>	A ZohraGCS Email	Zohra NFP (Grantee Contract Signatory)	Grantee Contract Signatory
<input checked="" type="checkbox"/>	Testing ContractSig Email	Zohra NFP (Grantee Contract Signatory)	Grantee Payment Signatory

An orange arrow points to the 'SAVE' button and another orange arrow points to the role dropdown menu for the first user.

11. Search Contracts Tool

You can search the online contract(s) for your organization at any time, even if you are not assigned to them.

11.1. Log in to the Grants Gateway using your Credentials.



New York State
Grants Gateway

Grants Gateway Login

SHOW HELP

Grant Opportunity Portal - Home

Login

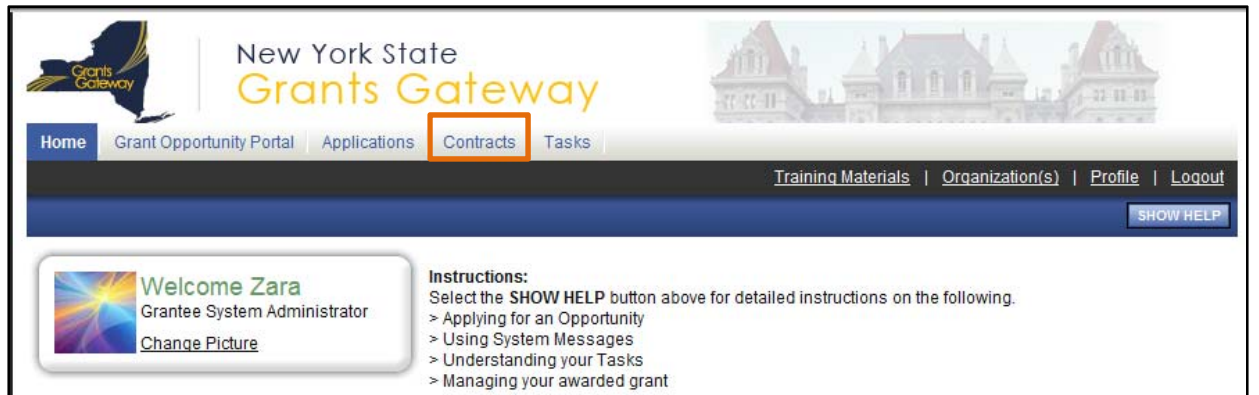
Username

Password

LOGIN

[Forgot Password?](#)

11.2. Click on the Contracts link located at the top of Home screen.



New York State
Grants Gateway

Home Grant Opportunity Portal Applications **Contracts** Tasks

Training Materials | Organization(s) | Profile | Logout

SHOW HELP

Welcome Zara
Grantee System Administrator
[Change 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

11.2.1. You can search the contract by using one or more search criteria on the Contract screen.



[Back](#)

Contracts

Use the search functionality below to locate a contract(s)

Search Contracts

Use the search criteria below, then select the **Search** button.

Grant Opportunity Name

Grant Opportunity ID

Current Contract Status

-OR-

Contract Status From To

Contract Type

Type of Vendor

Contract Number

Contract Term

-From

-To

Contract Period Number

Contract Period

-From

-To

SEARCH

CLEAR

12. Tasks Tool

You can use this tool to generate a list of tasks within your organization at any point in time. This tool is very helpful when you have to work on tasks that were not assigned to you originally. You can also use this tool to monitor contracts and who they are assigned to at any time during the contract development and approval process.

12.1. Log in to Grants Gateway using your Credentials.



New York State
Grants Gateway

Grants Gateway Login [SHOW HELP](#)

Grant Opportunity Portal - Home

Login

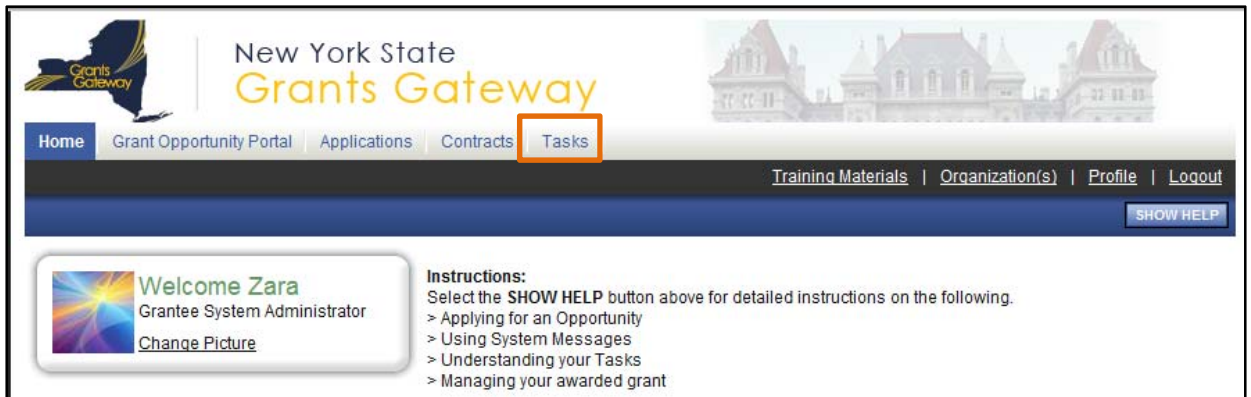
Username

Password

[LOGIN](#)

[Forgot Password?](#)

12.2. Click on the Tasks link located at the top of Home screen.



New York State
Grants Gateway

Home Grant Opportunity Portal Applications Contracts **Tasks** [Training Materials](#) | [Organization\(s\)](#) | [Profile](#) | [Logout](#) [SHOW HELP](#)

Welcome Zara
Grantee System Administrator
[Change 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

12.3. You can search the task(s) by using one or more search criteria on the Task List screen.

[Back](#)

Task List

Use the search functionality below to generate a list of tasks.

Search Tasks

Instructions:

1. Enter your search criteria below, then select the **Search** button.
2. If your search results in more than 200 records, only the first 200 will display. You can refine your search to return fewer tasks.

Agency

Document Type & Status Applications/Contracts Document Vaults

Role

User Name

Grant Opportunity Name

Grant Opportunity ID

Application Number

Contract Number

13. Understanding the Period Schedule Report

The Schedule Reports are tools in the Grants Gateway designed to assist with timely completion of contracting tasks. The Schedule Report details the contract’s progress through contract development and approval. Users can review the extent to which the overall schedule is on track (Remaining Scheduled Days). Users can review overall progress against each schedule stage (Remaining Days). Users can also review a step-by-step status history for the transaction.

NYS GRANTS GATEWAY
Schedule Report: Period

Organization Legal Name: Zara Child 1 NFP
Contract #: PDV01-T00021GG-1310000 (Simplified Renewal Agreement)
Grant Opportunity Type: Competitive

Period 1: 10/01/2014 - 11/15/2015
Term Date: 10/01/2014 - 09/30/2019
Offline No

Period 1 Current Status: Contract Executed **Remaining Scheduled Days 51**

Contract Development:		Status	Role	Scheduled Days	Actual Days	Remaining Days
	Program Manager Review	Program Manager	7	5	2	
	Contract Info Requested (PM)	Grantee	5	6	-1	
	Contract Manager Review	Contract Manager	9	10	-1	
	Contract Internal Review	Contract Manager	4	3	1	
	Subtotal		25	24	1	
Contract Approval:		Status	Role	Scheduled Days	Actual Days	Remaining Days
	Grantee Contract Signature Required	Grantee Contract Signatory	9	8	1	
	Contract Package Validation	Contract Manager	3	4	-1	
	Agency Signature Required	Agency Signatory	5	2	3	
	Contract Manager Routing	Contract Manager	7	1	6	
	AG Review and Approval	Attorney General Signatory	15	14	1	
	AG Not Approved As To Form	Contract Manager	4	0	4	
	Agency SFS Determination	Fiscal Staff	9	3	6	
	Transmit Contract Package to OSC	Contract Manager	8			
	Offline OSC Review And/Or SFS Approval	Contract Manager	15			
	Offline OSC Contract Information Requested	Contract Manager	7			
	Subtotal		82	32	20	
	Total Days		107	56	51	

Run date: 10/30/2014 Page 1 of 10

1. Current Contract Status: The status of the contract when report was run

2. Current Contract Period: The contract period when the report was run
3. Remaining Schedule days: Days remaining for the overall schedule (Total Schedule Days minus Total Actual Days)
4. Remaining Days: Days remaining for each individual status
5. Total Actual Days: Total actual days in which Contract Development and Approval process was complete
6. Total Schedule Days: Total days scheduled for the Contract Development and Approval Process
7. Grants Gateway role responsible for each corresponding status
8. Grants Gateway statuses during the Contract Development and Approval Process.

Example: In the report above, the status of Program Manager Review was scheduled to be completed by the Program Manager in 7 days. However the Program Manager completed their work in 5 days and had 2 days remaining. Similarly, the Grantee was scheduled to complete their work in the status of Contract Information Requested (PM) in 5 days. However, they completed their work in 6 days which means they were 1 day behind. From an individual standpoint, one status was over in days, and one was under. From an overall standpoint, for those two statuses, the net result is one day ahead. In order for the schedule report to be effective, users must consider both the number of days assigned to their individual status (task) and the number of days provided by the overall schedule.

Where one or more users exceed the number of days assigned to their individual status, the contract will be late if others do not recover the balance.

For this reason, the Schedule Report tracks both Status Remaining Days and Remaining (Total) Scheduled Days.

Period 1 Current Status: Grantee Signature Required				Remaining Schedule Days: 37
Contract Development:				
Status	Role	Scheduled Days	Actual Days	Remaining Days
Contract Information Requested (PM)	Grantee	1	1	0
Program Manager Review	Program Manager	2	2	0
Contract Manager Review	Contract Manager	4	6	-2
Contract in Internal Review	Contract Manager	6	8	-2
	Subtotal	13	17	

14. Tools Available

14.1. Grants Reform Website

The Grants Reform Initiative website can be found at www.grantsreform.ny.gov

- 14.1.1. By clicking on the “Grantees” tab at the top of the page you can find numerous Quick Links on the left side of the page for information and samples that you will need to complete the process.



The screenshot shows the homepage of the Grants Reform website. At the top, there is a navigation bar with "New York State" and "State Agencies" links, and a search box. Below the navigation bar is a large banner with the text "Streamlining State Grant Processes" and a graphic of the state of New York with an orange arrow pointing to the bottom right. The main content area is divided into two columns. On the left is a "Quick Links" sidebar with a list of links including "Grants Gateway", "Registration Form for Administrator", "Sample Organization Charts", "Grantee User Guide", "Sample Board of Directors Profile", "Substitute Form W-9", "Senior Leadership CV Template", "MWBE Board Resolution Template", "NFP Prequalification", "Website Resources", "FAQs About Prequalification", "May 15 Correspondence", "Policy Statement", "Documents and Questions", and "Vendor Prequalification Manual". On the right is the main content area with the heading "Information for Current and Potential Grantees". Below this heading are three sections: "The Grant Opportunity Portal", "The Grants Gateway", and "Prequalification Overview".

Information for Current and Potential Grantees

New York State is committed to making the grant contracting process easier for grantees. **The Grant Opportunity Portal and the Grants Gateway will improve the way New York State administers grants** by simplifying and streamlining the grants management process.

The Grant Opportunity Portal

The Grant Opportunity Portal is a one-stop shop for anyone interested in locating funding opportunities. State agencies have already posted nearly 100 upcoming and available procurements and are adding to the list on a daily basis. You can search for and download solicitations with no login required. Check out the Grant Opportunity Portal today!

The Grants Gateway

The Grants Gateway is the next step for organizations interested in doing business with New York State. **This spring, State agency funding opportunities will begin to be posted on the Gateway for online application.** To prepare for this exciting transition, it is essential that all potential bidders register with the Gateway and create an account that will provide full access to the system. Potential applicants can locate [online](#) opportunities by clicking [View Opportunities](#) on the user's Home page.

Prequalification Overview

Pursuant to the New York State Division of Budget Bulletin H-1032, dated June 7, 2013, New York State has instituted key reform initiatives to the grant contract process which require **not-for-profits must register in the Grants Gateway and complete the Vendor Prequalification process.** In the case of competitive grant opportunities:

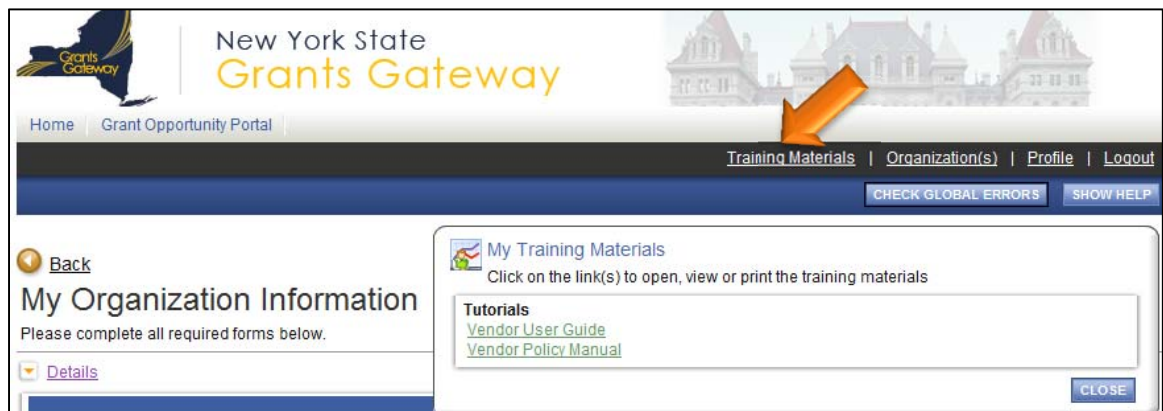
Proposals received from not-for-profit applicants that have not Registered and are not Prequalified in the Grants Gateway on the proposal due date cannot be evaluated. Such proposals will be disqualified from further consideration.

In order to prequalify, not-for-profit organizations must submit an online Prequalification Application through the Grants Gateway. The Prequalification Application is comprised of five components to gauge organizational structure and the types of services provided. The required forms and document uploads are all part of the Document Vault. The Vendor Prequalification Manual detailing the requirements can be found in the Quick Links Section.

- 14.1.2. Video tutorials showing step by step directions for completing a document vault and completing and submitting an application are available on the Videos tab and on our YouTube channel.



- 14.2. You will also find several training materials within the Grants Gateway itself. Log in to Grants Gateway and click on the Training Materials link in the top black ribbon.



15. Helpful Information/Links

- Manuals, guides, FAQs, policies, and more:
www.grantsreform.ny.gov/grantees
- Grants Reform on YouTube:
<http://www.youtube.com/channel/UCYnWskVc7B3ajjOVfOHL6UA>
- Grants Reform Team
Grantsreform@budget.ny.gov
(Application, Policy, and Registration questions)
- www.grantsgateway.ny.gov
Within the Grants Gateway:
 - Training materials
 - Show help
- For technical assistance, you can contact our Grants Gateway's Help Desk at 1-800-820-1890, or via Email at helpdesk@agatesoftware.com, Monday thru Friday 8am to 8pm.
- Questions regarding specific opportunities or applications should be directed to your funding agency.