



New York State Grants Gateway
Grantee Quick Start Guide
Contract Development & Approval Process



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1) Introduction

This document is provided as a “quick start” guide to the online Grants Gateway Contract Development and Contract Approval process. For other Gateway functions, a comprehensive system user manual (Grantee User Guide) can be found at www.grantsreform.ny.gov/Grantees.

This manual is divided in two parts;

- Part 1 of this provides an overview of the online Contract Development process
- Part 2 walks through the online Contract Approval process

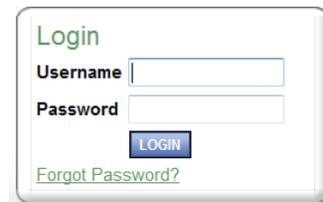
Before contract development begins, the application/contract materials will have been reviewed by a State User and sent to the Grantee for editing or review.



2) Contract Development Process

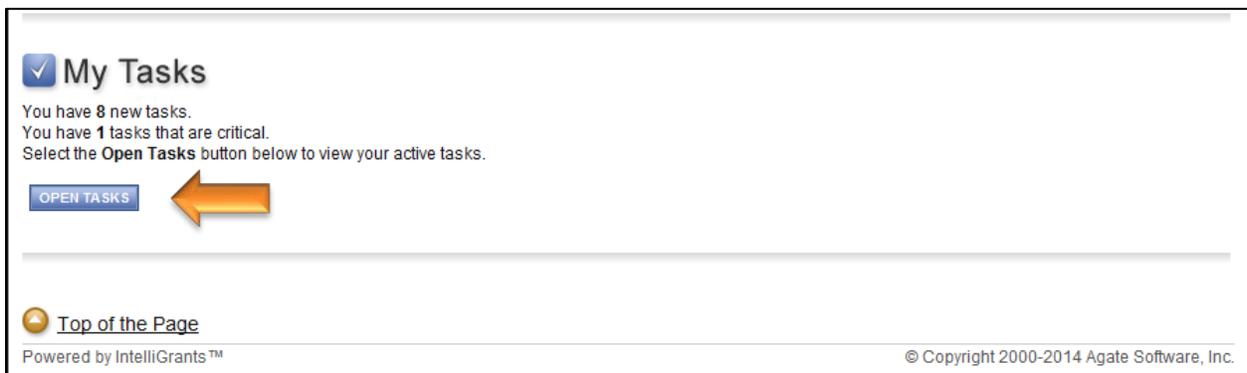
Once the Program Manager reviews the contract related information in the Grants Gateway, they may send it to grantee for any needed changes. This section explains how to make those changes.

2.1 Log in to Grants Gateway using your credentials.



2.2 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.





2.3 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 6 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	

2.4 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: 8 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](#)



2.5 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

The screenshot shows the New York State Grants Gateway interface. The navigation bar includes links for Home, Grant Opportunity Portal, Applications, Contracts, Payments, and Tasks. A secondary navigation bar contains Training Materials, Organization(s), Profile, and Logout, along with buttons for CHECK GLOBAL ERRORS and SHOW HELP. The main menu includes Back, Menu, Forms Menu (highlighted with an orange box), Status Changes, Management Tools, and Related Documents and Messages. The page title is "Application/Contract Menu - Forms" and it includes a "Details" link. Below is a table with document information.

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

2.6 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.

The screenshot shows a "File Folder(s)" section with a single folder named "Grantee Document Folder". An orange arrow points to this folder.

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



SAVE ADD DELETE ADD NOTE CHECK GLOBAL ERRORS

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

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: Agreement

File name: DELETE*

[View File](#)

Comments:

0 of 500

Document Approved

2.6.2 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

SAVE ADD DELETE ADD NOTE CHECK GLOBAL ERRORS

2.6.3 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:

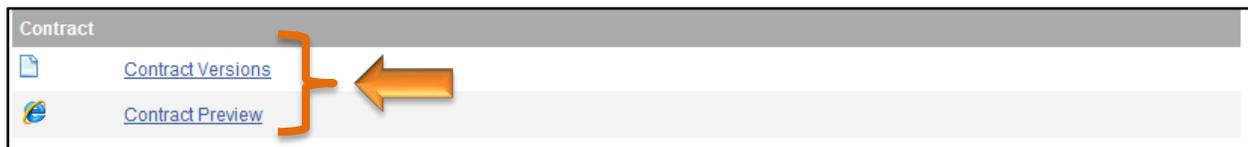
File name: DELETE*

Comments:

Document Approved

2.7 At the bottom of the Forms Menu, you will be able to see contract related forms such as:

- **Contract Version:** 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.





- 2.8 The Add Notes tool in the grants gateway is a very useful tool to communicate with the State Agency as well as within your own organization. You can also 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 4 of this document for instructions on how to add a note to forms.
- 2.9 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.





3) Contract Approval process

3.1 Existing conditions

- 3.1.1 The online contract development process has taken place in the Grants Gateway.
- 3.1.2 The contract has passed through the Contract Development loop (Program Manager Review, Contract Manager Review, and Internal Review, if applicable) in the Grants Gateway.
- 3.1.3 The Contract Manager has reviewed the contract and has determined that there are no more changes needed.
- 3.1.4 The Contract Manager has changed the status to **“Grantee Contract Signature Required”** to obtain the grantee’s signature.

3.2 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 5.)



Login

Username

Password

[Forgot Password?](#)



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

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.

[OPEN TASKS](#)

[Top of the Page](#)

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3.4 Select the name of the contract in the status on **“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: 6 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](#)



3.5 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
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Period Reports

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

Application Reports
(Competitive Opportunities only)

- [Schedule and Activities Report](#)



3.6 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.

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

[Back](#)
[Menu](#) [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	Grantee Contract Signature Required	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 Zohra CM 10/5/2014 12:14:12 PM
	Contract Preview	



- 3.8 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.

The screenshot shows the Grants Gateway interface. At the top, there are navigation tabs: Home, Grant Opportunity Portal, Applications, Contracts, and Tasks. Below these are links for Training Materials, Organization(s), Profile, and Logout, along with buttons for ADD NOTE and CHECK GLOBAL ERRORS. A breadcrumb trail includes Back, Menu, Forms Menu, Status Changes, Management Tools, and Related Documents and Messages. The document information is PDV01-0925-2014-00002. A table lists contract 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

- 3.9 You can sign the contract by going to Status Changes and applying the status of **“Grantee Contract Signature Complete”**.
Note: You can send the contract back to contract development by applying the status **“Contract Manager Review”** if there are any changes that need to be made prior to signature.



Home Grant Opportunity Portal Applications Contracts Tasks

Training Materials | Organization(s) | Profile | Logout

ADD NOTE CHECK GLOBAL ERRORS

Back

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

Document Information: PDV01-0925 Status Changes

Details

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

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

CONTRACT VERSIONS

Instructions:

- Click a link below to view the version of

Version	File Link
Unsigned Contract	N/A
Grantee Signed Contract	Grantee Signatory
Agency Signed Contract	Agency Signatory
Attorney General Signed Contract	AG Signatory
OSC Approval	External
OSC Non-Approval	Contract Executed

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

3.10 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.



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

Back | **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 Zohra CM
10/5/2014 12:14:12 PM 10/5/2014 12:14:12 PM
- [Contract Preview](#)



3.12 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?

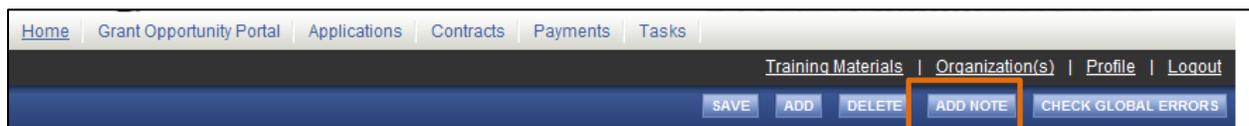


4) Notes Tool

- 4.1 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
	> Personal Services - Salary Narrative	Zara GCS 9/29/2014 11:34:34 AM
	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

- 4.2 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.





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

Notes

There are no available notes at this time.

Message	Date	Action
---------	------	--------

ADD A NEW NOTE CLOSE NOTES

- 4.4 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 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.

Add New Note

Subject

Message

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 CANCEL CLOSE NOTES

- 4.5 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.



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



4.7 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.





4.8 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.

Notes

Message	Date	Action
Important Note	9/30/2014	Edit

ADD A NEW NOTE CLOSE NOTES



Edit Note

Subject
Important Note

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

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

Notes

Message	Date	Action
Important Note	9/30/2014	Edit

ADD A NEW NOTE CLOSE NOTES



5) Add/Edit People tool

5.1 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.

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.

CHECK FOR ERRORS
Select the link above to check the entire document for errors.

CONTRACT MAIN PAGE (GRANTEE)

Contract Properties

Contract Number	Contract Term From	Contract Term To	Contract Type
NCS01-L000011GG-1270200	04/01/2013	03/31/2014	MULTIYEAR

Period 1: 04/01/2013-03/31/2014

Period Financial Summary

Period Total	\$100,000.00
--------------	--------------

5.2 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. You can edit a user by changing their role in the organization, adding or editing the active/inactive dates and selecting Save.

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



6) Search Contracts Tool

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

6.1 Log in to the Grants Gateway using your Credentials.



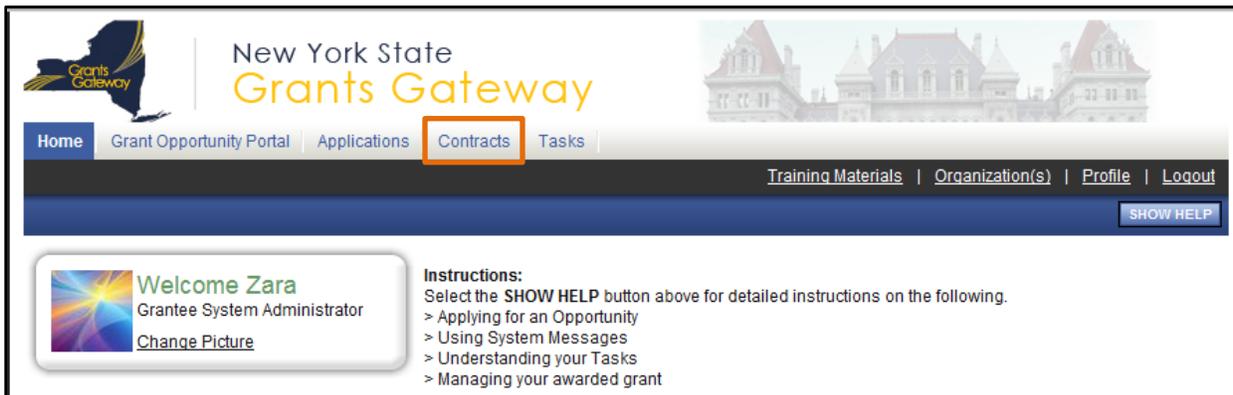
Login

Username

Password

[Forgot Password?](#)

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





6.3 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



7) 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.

7.1 Log in to Grants Gateway using your Credentials.



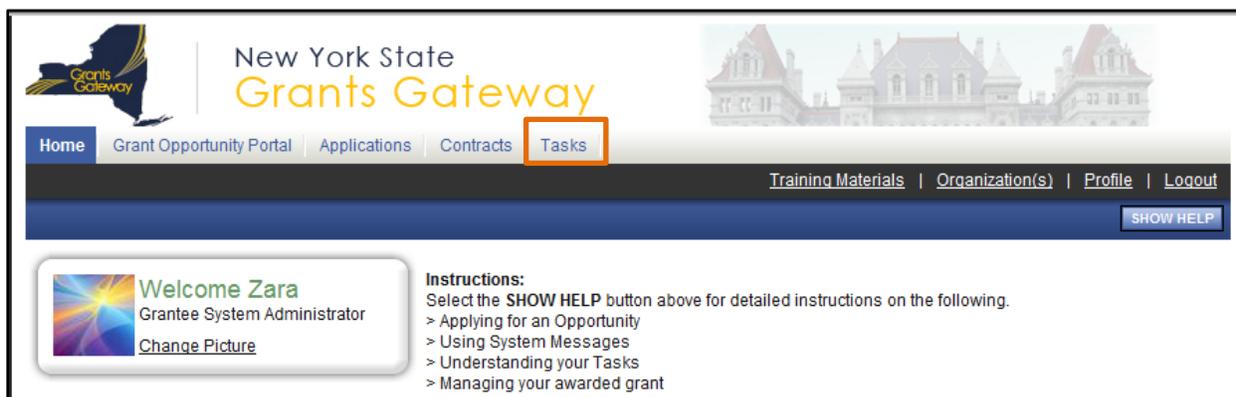
Login

Username

Password

[Forgot Password?](#)

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





7.3 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



8) Understanding the Period Schedule Report

The Schedule Reports are tools in the Grants Gateway designed to assist with timely completion of contracting tasks

NYS GRANTS GATEWAY
Schedule Report: Period

Organization Legal Name: Zara Child 1 NFP
Contract #: PDV01-T00021GG-1310000 (Simplified Reporting Requirement)
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 in 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 STS 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	

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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 Request 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		



9) Helpful Information/Links

- www.grantsreform.ny.gov/grantees
- Grants Reform Videos (includes a document vault tutorial and an application tutorial) on YouTube:
<http://www.youtube.com/channel/UCYnWskVc7B3ajjOVfOHL6UA>
- Agate Help Desk – For any technical assistance with Grants Gateway system
 - Phone: 1-800-820-1890
 - Email: helpdesk@agatesoftware.com
 - Monday thru Friday 8am to 8pm.
- Grants Team Email: grantsreform@budget.ny.gov
(Application, Policy, and Registration questions)
- www.grantsgateway.ny.gov
Within the Grants Gateway
 - Training materials link will contain training documents and videos
 - Show help
- Questions about completing applications/contracts can be emailed to grantsreform@budget.ny.gov
- Questions regarding specific opportunities or applications should be directed to your funding agency.