



New York State
Grants Gateway



New York State Grants Gateway

Vendor User Guide

Version 1.4

April 7, 2014



Table of Contents

1. Grantee Orientation	3
2. Grant Opportunity Portal	4
2.1. Grant Opportunity Portal – Home	4
2.2. Browse a list of Grant Opportunities	5
2.3. Search a list of Grant Opportunities	6
2.4. Download a Grant Opportunity	7
2.5. Sign-up to be notified of upcoming Grant Opportunities	9
2.6. Update Notification Preferences	11
3. Registration	13
3.1. Learn how to become a Registered User	13
3.2. Logging into the Grants Gateway	15
4. Delegated Administrator Tutorial	18
4.1. Grantee Roles	18
4.2. Creating User Accounts	19
4.3. Modifying User Accounts	22
4.4. Inactivating User Accounts	23
5. Document Vault Tutorial	25
5.1. Grantee Organization Information	26
5.2. Document Vault	28
5.3. Prequalification	33
6. Online Application	46
6.1. Search for Grants	47
6.2. Create an Online Application for a Specific Grant	50
6.3. Retrieve Application	68
6.4. Cancel Application	70
6.5. Add/Edit People tool	72
6.6. Submit an Online Application	74
6.7. Tools Available	78
7. Helpful Information/Links	80



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, online application, contract development and signature.

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. 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

New York State
Grants Gateway

Grants Gateway Login [SHOW HELP](#)

Grant Opportunity Portal - Home

Welcome to the Grants Gateway

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 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, grantees 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.

Check back regularly as additional functionality, including online application, contract development and signature, and financial claiming and reporting is on track for release later this year.

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

<h4>BROWSE</h4> <p>Looking for a listing of funding opportunities? Use the browse feature to get started.</p> <p>Browse Now!</p>	<h4>SEARCH</h4> <p>Looking for information about a specific funding opportunity? Use the Search feature to narrow your focus.</p> <p>Search Now!</p>	<h4>NOTIFICATION</h4> <p>Want to be kept informed of upcoming and available funding opportunities? Provide your email address, and identify the types of grants that interest you.</p> <p>Sign-up Now! Already Signed-up? Click here to update preferences.</p>	<h4>REGISTRATION</h4> <p>If you are already a vendor with NYS or are interested in becoming a vendor request access here.</p> <p>Request Access Now!</p>
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For a complete listing of all New York State procurement and grant opportunities, please visit the [Contract Reporter](#).

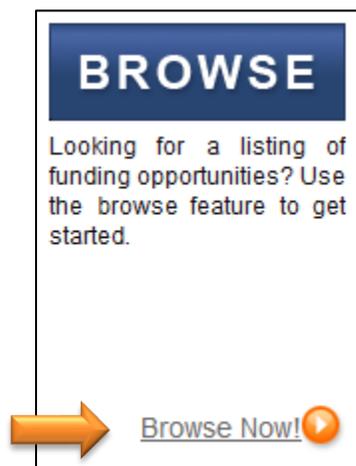


2.2. Browse a list of Grant Opportunities

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:

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



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

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

2.2.3. Click the **Grant Opportunity** name to view the Grant Opportunity Profile (see 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 **Browse for Opportunities** link on any page to return to the **Browse for Opportunities** page.

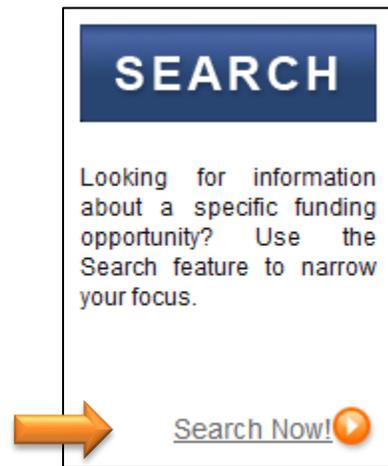


2.3. Search a list of Grant Opportunities

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:

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



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

NOTE: Hold the Ctrl key and click with the mouse to make multiple selections when searching by Eligibility, Funding Agency and/or Service Area.

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"/>



2.3.3. Select the **SEARCH** button.



2.3.4. Click the **Grant Opportunity** name to view the Grant Opportunity Profile (see 4. Download a Grant Opportunity in this Section for further details).

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

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

2.4. Download a Grant Opportunity

The Grant Opportunity Portal allows grantees to download PDF versions of available Grant Opportunities.

Download a Grant Opportunity by doing the following:

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

2.4.2. 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

2.4.3. 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

 **DOWNLOAD GRANT OPPORTUNITY**

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

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

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

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



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

2.4.8. 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.



2.5. 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:

NOTIFICATION

Want to be kept informed of upcoming and available funding opportunities? Provide your email address, and identify the types of grants that interest you.

[Sign-up Now!](#) 

 [Already Signed-up?
Click here to update preferences.](#) 

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

2.5.2. 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"/>	*





2.5.3. 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	

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



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

2.5.5. 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.

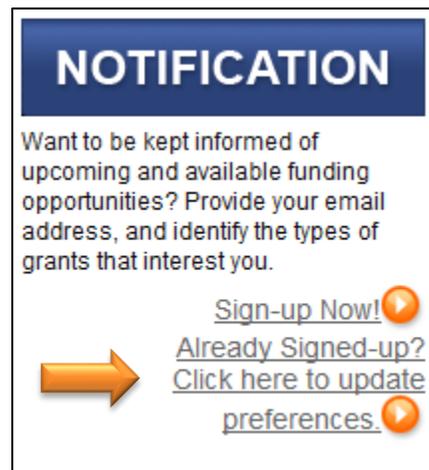
[RETURN TO THE GRANT OPPORTUNITY PORTAL HOME](#)



2.6. 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.

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



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

A form titled "Portal Login" in green text. It contains an "Email Address" label followed by a white text input field. To the right of the input field is a blue button with the word "LOGIN" in white. A large orange arrow points from the right side of the form towards the LOGIN button.



2.6.3. 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	

2.6.4. Select the **UPDATE PREFERENCES** button.



2.6.5. The message below will appear on the screen.

 **Update 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](#)



3. Registration

3.1. Learn how to become a Registered User

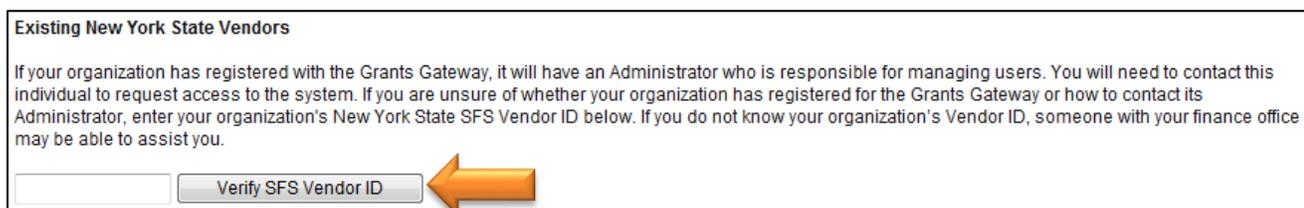
3.1.1. Click the **Request Access Now!** Link on the portal home page.



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.





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.

Welcome to the Grants Gateway

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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, grantees 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.

Check back regularly as additional functionality, including online application, contract development and signature, and financial claiming and reporting is on track for release later this year.

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

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

Page Error(s)
You must change your password the first time you login to the system.

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.

Password * **Confirm Password** *

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



New York State
Grants Gateway



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.

- Grantee Roles
- Creating User Accounts
- Modifying User Accounts
- Inactivating User Accounts

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 Profile

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 Profile

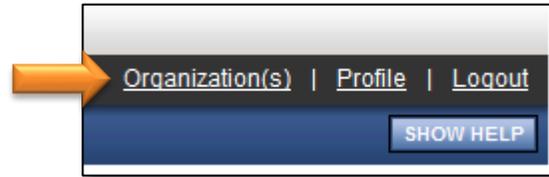


- 4.1.3. **Grantee Contract Signatory** – The Grantee Contract Signatory role is the user authorized to review and sign contracts on behalf of the Grantee Organization. Activities for this role include but are not limited to:
- Initiate, complete and submit applications
 - Sign contracts
 - Initiate,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

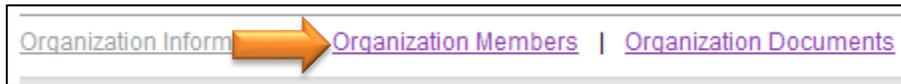
4.2. Creating User Accounts

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.

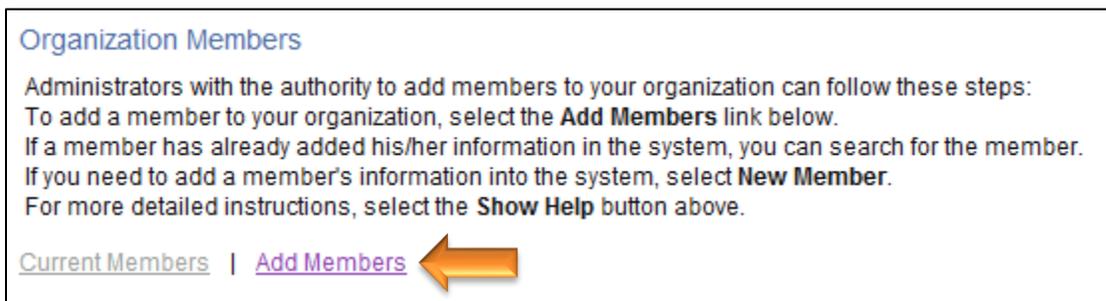
- 4.2.1. Click the **Organization(s)** link on the home page.



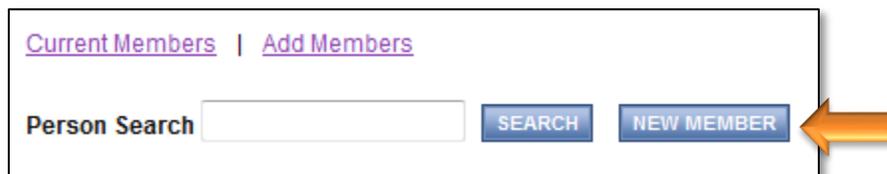
4.2.2. Click on the **Organization Members** link.



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.



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"/>		
	<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.

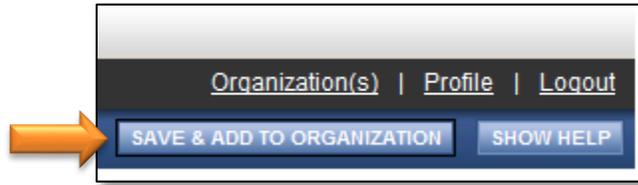
The fields below are populated with the Organization information by default. However, you may edit the information in any of the fields. This information may also be edited by the person you are creating the profile for from their Profile page.

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.

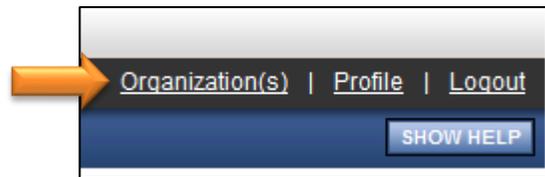


4.2.10. The new user will receive two separate emails from the Grants Gateway: One email will contain the username and the other will contain the password.

4.3. Modifying User Accounts

Note: All users in the system are able to update their profile information with the exception of their role. The Delegated Administrator is responsible for updating user roles when necessary. In addition, 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:

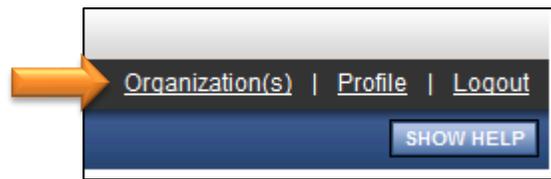
<input type="checkbox"/>	Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/>	Lee, Bruce	Grantee	5/14/2013 - <input type="text"/>		lee, Vivian 5/14/2013	lee, Vivian 5/14/2013
<input checked="" type="checkbox"/>	Lee, Robert		5/14/2013 - <input type="text"/>		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 information as appropriate and click the **SAVE** button.

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.



<input checked="" type="checkbox"/> Lee, Robert	Grantee	5/14/2013		lee, Vivian 5/14/2013
-----------------------------------------------------------------	---------	-----------	--	--------------------------



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

Date Active	5/14/2013	Date Inactive	
Role	Grantee		
The fields below are populated with the Organization information by default. This information may also be edited by the person you are creating the profile.			
Address	150 W 65TH ST		
City	NEW YORK	State	New York
		Zipcode	10023

May, 2013

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: May 14, 2013



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 Required 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 organizations.

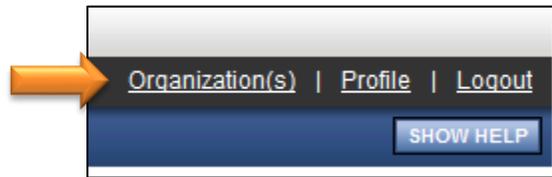
- Grantee Organization Information
- Document Vault
- Prequalification



5.1. Grantee Organization Information

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 pulled in 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 and it will be imported into the Grants Gateway the following day. 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"/>	*
County	<input type="text"/>	
Phone Number	<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"/>	*
State	<input type="text" value="New York"/>	*
Zipcode	<input type="text" value="10514-3814"/>	*
Fax	<input type="text"/>	



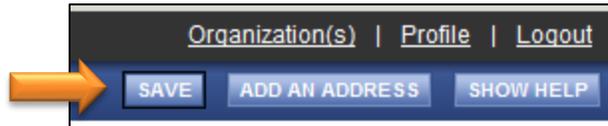
You will be asked to select the agency that your organization has done the most business with (greatest number of contracts) in the last 3 years. If your organization has not had a contract with a State agency select the one you anticipate contracting with.

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.

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

Organization Information | Organization Members | Organization Documents | Document Vault





5.2. Document Vault

Welcome to the Document Vault. In this section, each organization type has a unique set of forms and data sets it can populate. For the example, the “Non-Profit” organization type was used. This type has the most required forms of the list. (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 Forms” 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

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

Yes No

2. Does the organization have an automated payroll system?*

Yes No

3. 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



- i. Contract Start Date: Date the contract began
- j. Contract End Date: Date the contract ended
- k. Total Contract Amount: Dollar amount of the contract

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:

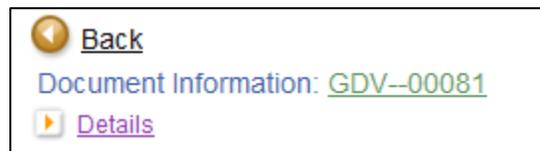
You will be asked to identify that staff member and enter key information about them.

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.



5.2.9. 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:	
<ul style="list-style-type: none">• 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	<input type="text"/> <input type="button" value="Browse..."/> 
Date Issued	<input type="text"/> 

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 www.grantsreform.ny.gov/grantees website.

- 5.2.10. 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.

Form Optional Documents	
	Licenses (Site or Professional)
	Certificate of Assumed Name or DBA
	Certificate of Insurance - Disability
	Certificate of Insurance - Workman's Compensation
	Certificate of Insurance - Unemployment
	Policies and Procedures
	Annual Report

- 5.2.11. 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.



Status Change

 [Click Here to Submit your Document Vault](#) 

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).



[PRINT](#) [SHOW HELP](#)

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.

[Back](#)

My Organization Information

Please complete all required forms below.

[Details](#)

[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.



[Back](#)

My Organization Information

Please complete all required forms below.

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Document Vault	Jimmy's Jelly Beans	System Administrator (ENT)	Document Vault in Review	N/A - N/A N/A

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

Once the Document Vault has been submitted the Grantee Delegate Admin and/or Grantee that submitted the Document Vault will receive an email indicating that the Document Vault has been submitted. Within the Grants Portal, 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.

a. 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

b. 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 the Grants Portal 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.

Back

Drag Here

Priority	Sender	Subject	Date/Time
	Grant System	Document Vault	6/21/2013 9:12:30 AM

Recipients
EmailDA, Test, EmailsGR, Test;

Your Document Vault GDV-DCJS-00182 has been reviewed and modifications are required. Please see the Prequalification Report in your Data Vault for an explanation of the required modifications.

Related Document: [GDV-DCJS-00182](#)

CLOSE PRINT ARCHIVE

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.

Status	Page Name	N
	PQ Number History	
Required Forms		
	Organization Capacity	
	Organization Compliance	
	Organization Integrity	
	Service Descriptors	

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

	Vendor Responsibility Questionnaire	
	Organization Chart	
	Board of Directors Meeting Minutes	
	Other (Specify)	
Management Screens		
	Prequalification Application Status Report	
	Status History	
	Process Flow Snapshot	
	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

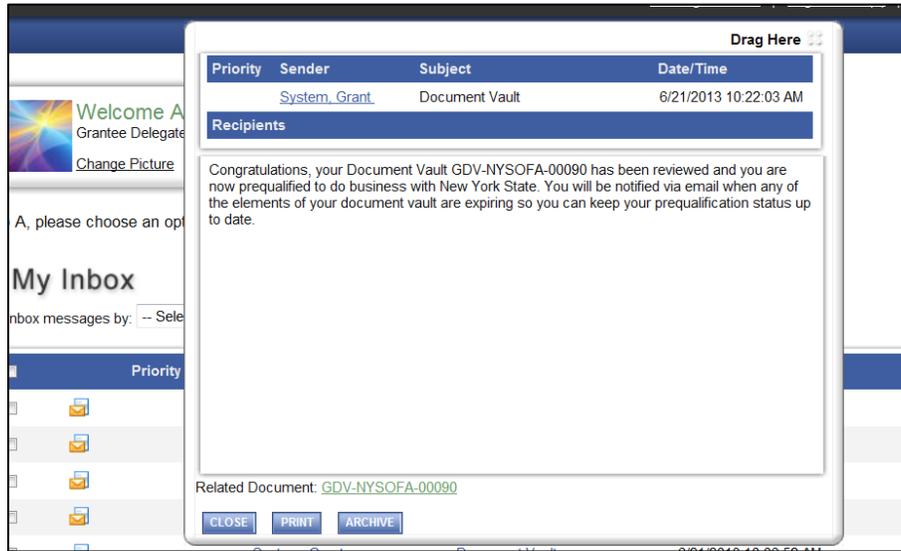
Legal Name: FAMILY OF WOODSTOCK INC
Payee Name: FAMILY OF WOODSTOCK INC
SFS Vendor ID: 1000027410

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 above in Section 3 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 Admin will receive a system generated email in your 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 be available, which also is an indication that no further work on the Document Vault is required.

5.3.10. 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 Prequalification Status Report.

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



- [Vendor Responsibility Questionnaire](#)
- [Organization Chart](#)
- [Board of Directors Meeting Minutes](#)
- [Other \(Specify\)](#)
- Management Screens**
-  [Prequalification Application Status Report](#)
- [Status History](#)
- [Process Flow Snapshot](#)
- [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.

The Document Vault Submission and Approval process is now complete.

Required Documents Expiration

New York State requires Grantees to annually update the organizations 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.

The Grants Gateway will send a system generated email to each Grantee Delegated Administrator for your organization 30 days in advance of the expiration of one of the Required Documents.

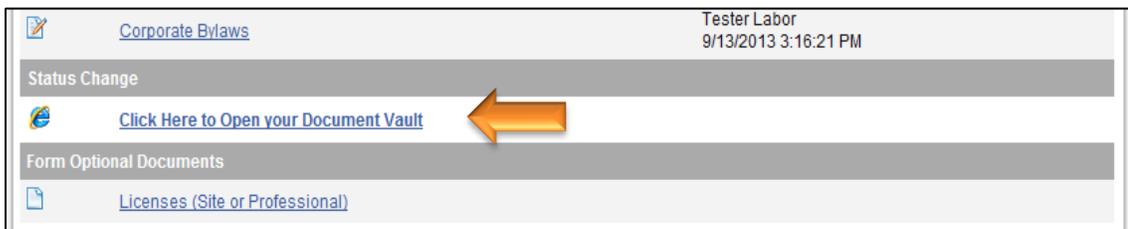
Upon receiving this email, the Grantee should obtain all of the documents that require updating, only the IRS 990, Audit Review and Findings and the CHAR 500 Charities Registration Form require annual updating.



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

Please note that while your organization's Document Vault is in Open status you are not considered Prequalified and are not eligible for State grant awards.

From the main Document Vault page use the Click Here to Open Document Vault link. This will change the status to Open and the Grantee can upload the new documents by clicking the appropriate section from the Main Document Vault page



Next, click on the link for the IRS 990, Audit Review and Findings or the CHAR 500. While each section will need to be updated the process is the same for each section.

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 Open. Once the Document Vault is in Open Status the Grantee must upload the most current documents or the appropriate extension from either the IRS or the New York State Attorney General to maintain Prequalified Status.





From the main Document Vault Page click the link for each of the documents that require updating. You will see that current document 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 Open.

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 Browse... DELETE*

Date Filed * Date next Filing is Due *

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 as outlined in the accompanying chart 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-CHAR500andAuidtReportScreenshotsforlan.docx

Date Filed * Date next Filing is Due *

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 *

Date Filed * Date next Filing is Due *



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 like 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.

This completes the annual uploading of the IRS 990, Audit Review and Findings, and the CHAR 500 Charities Registration Form.



6. Online Application

This section of user guide is to provide guidance 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 been registered and prequalified. If you have not registered or are not prequalified, please go through the related Grantee Document Vault section 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



6.1. Search for Grants

6.1.1. To begin using the Gateway, click on the 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” right 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 Available Opportunities” link on the home screen to view all available opportunities.



Welcome A
Grantee
[Change Picture](#)

Instructions:
 Select the **SHOW HELP** button above for detailed instructions on the following.
 > Using System Messages
 > Understanding your Tasks

Hello A, please choose an option below.

View Available Opportunities

You have Opportunities available.
 Select the **View Opportunities** button below to see what is available to your organization.

[VIEW OPPORTUNITIES](#)

6.1.4. On the Available Opportunities page, a high-level list of open solicitations is presented. Funding Agency, Release date, 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 - All -

Search by Funding Agency - All -

[SEARCH](#) [CLEAR](#)

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 using available search criteria such as:

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

[Back](#)

Opportunities

Search by Grant Opportunity

Search by Due Date From: To:

Search by Eligibility

Search by Funding Agency

6.1.6. To learn more about it or to begin the application process, 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

Grant Opportunity ID
DCJ01-ABCD-2013

Agency
Division of Criminal Justice Services

Grant Opportunity
DCJS Demo 2013 Alternative to Incarceration Grant

Contact Name
Video

Contact Email
tutorial@tutorial.com

Solicitation Profile
This is a demonstration grant description to provide an example of what a Grant Opportunity Description could look like.

APPLY FOR GRANT OPPORTUNITY

[Top of the Page](#)

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)	None available
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

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 ID
- Description of available Grant Opportunity
- Full Announcement Details

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





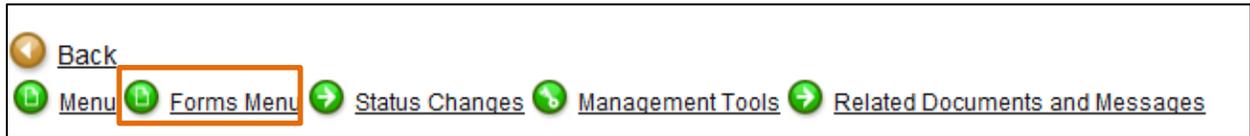
It is very important you do not click “Apply for Grant Opportunity” again (after your initial application has been created) in the system, as it will create duplicate applications (if the RFP allows more than one Application per grantee). Once an application has been initiated, you should continue using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

6.2.5. The system assigns an Application ID to application.



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



6.2.7. 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.

Status	Page Name	Note	Created By	Last Modified By
Contract Documents				
	State of New York Master Grant Contract for Grants			
	Attachment A-1: Program Specific Terms and Conditions			
	Attachment A-2: Federal Specific Terms and Conditions			

6.2.8. 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 grants coordinator has provided them.

Application Information	
	Print Application
	Application Instructions

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

Program Information	
	Project/Site Addresses
	Program Specific Questions

6.2.9.1. Click on the Project/Site Addresses to fill the form.



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:

Address 1:

Address 2:

City:

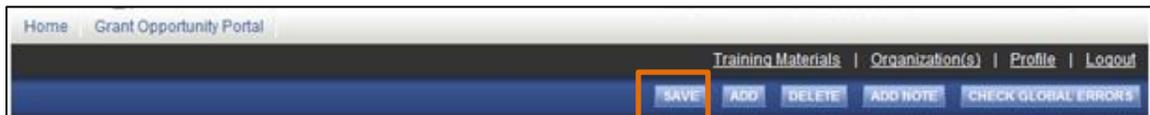
State:

Zip:

Regional Council:

Agency Specific Region:

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



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



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.

6.2.9.4. Click on the Program Specific Questions to fill the form. Follow the instructions provided in the opportunity to complete the form.



Training Materials | Organization(s) | Profile | Logout

SAVE 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: DCJ01-ABCD-2013-00001
[Details](#)

PROGRAM SPECIFIC QUESTIONS

Instructions:
1. Please complete all the required fields.
2. Select the Save button above to save your work frequently.

Project Title

This is where you would enter text that should be read and consider to answer all of the questions. Specifics should be included in the question/text area below.

1 This is the first question. A response is required but an upload is not. (10 points)

A This is a second question. A response is not required but an upload is. (20 points)

2 A third question requires a response and an upload.
Yes DELETE*

[7070-Testgrant.pdf](#)

4 test
No

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

Home Grant Opportunity Portal Applications Contracts

Training Materials | Organization(s) | Profile | Logout

SAVE CHECK GLOBAL ERRORS

6.2.9.6. Click on the DELETE button if you wish to delete the information entered on the program specific questions form.

Home Grant Opportunity Portal Applications Contracts

Training Materials | Organization(s) | Profile | Logout

SAVE DELETE ADD NOTE CHECK GLOBAL ERRORS

6.2.10. The next section in the Forms Menu will be the Budget Section. This section will have forms based on the budget type of the funding agency.



6.2.10.1. 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

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

6.2.10.2. 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

- a. Fill in the Performance 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.



- c. Once your detail pages have been completed, click on the Performance Summary and click save to insure everything has been entered as required.

6.2.10.3. 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.

6.2.10.4. 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

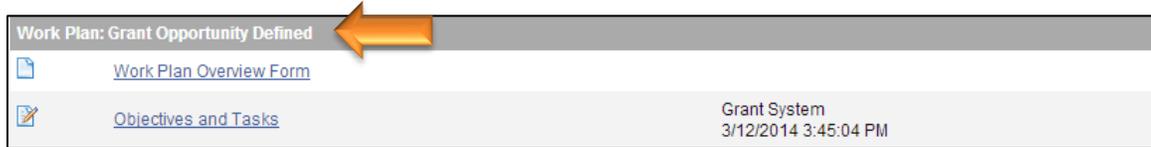
6.2.11. The next section of the Forms Menu is the Work Plan. The Work Plan can be Grant Opportunity Defined **or** Grantee Defined based on the funding agency decision.

6.2.11.1. Grant Opportunity Defined Work Plan



6.2.11.2.

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.



- a. 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.

- b. All the fields on the Work Plan Overview form are mandatory.
- c. Click on the SAVE button after all the required information is entered in the Work Plan Overview form.



SAVE

CHECK GLOBAL ERRORS

d. 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	

e. Click on the View/Add link to add Performance Measures for the each defined Tasks

OBJECTIVES AND TASKS

Instructions:

- 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



f. Enter required information on the Performance Measure screen

The screenshot shows the 'PERFORMANCE MEASURE' screen. At the top, there is a navigation bar with links: Back, Menu, Forms Menu, Status Changes, Management Tools, and Related Documents and Messages. Below this, the document information is 'DOL01-ABC-2014-00001' and there are links for 'My Activities: New, Current, Review, Assigned' and a 'Details' link. The main heading is 'PERFORMANCE MEASURE'. Under 'Instructions', there are four numbered steps: 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. Below the instructions, the 'Objective' is 'This is our first objective for Grantee to complete' and the 'Task' is 'Grant Opportunity Defined Objectives and Tasks 1'. The form has a 'Performance Measure Name' field with a red asterisk, a 'Narrative' text area with a '0 of 1000' character count and a red asterisk, and an 'Upload' section with a 'Browse...' button.

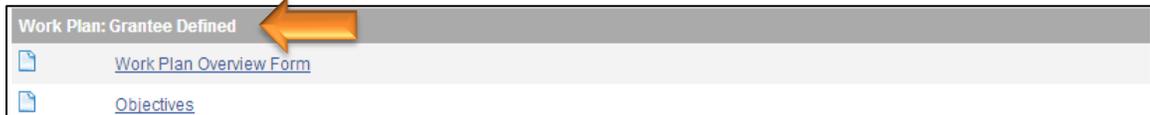
g. Click on the SAVE button after all the required information is entered in the form.

The screenshot shows the bottom navigation bar with links for 'Training Materials', 'Organization(s)', 'Profile', and 'Logout'. There are two buttons: 'SAVE' and 'CHECK GLOBAL ERRORS'. The 'SAVE' button is highlighted with an orange box.



6.2.11.3. 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.



- a. 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 *

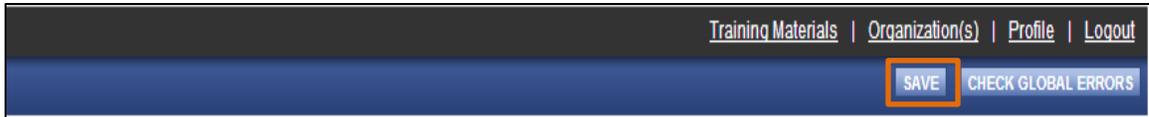
Project Summary
Provide a high-level overview of the project, including the overall goal and desired outcomes. Include information such as location, target population, overall number of persons to be served, service delivery method and hours of operation.

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

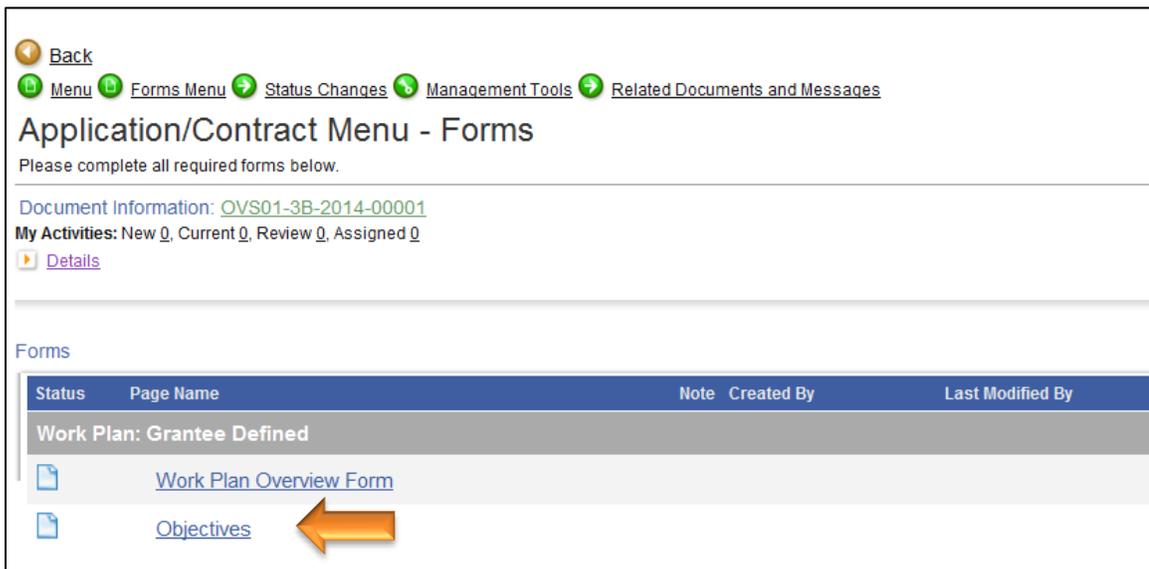
- b. All the fields on the Work Plan Overview form are mandatory.



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



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



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



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](#)

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.

- f. 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 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 Performance Measures to the Objective.
5. Click Forms Menu to return to the navigation links.

Objective Name
ABC Objective

Objective Description
Test

Status	Page Name	Note
	Work Plan Overview Form	
	Objectives	
	Tasks	

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

New York State Grants Gateway

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

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

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



SAVE DELETE ADD NOTE CHECK GLOBAL ERRORS

Page Information
The information has been saved.

Navigation Links

Status	Page Name	Note
	Objectives	
	Tasks	
	Performance Measure	

Back Menu Forms M and Messages

Document Information
My Activities: New 0, C
[Details](#)

TASKS

Instructions:

1. Enter an Task in
2. Select the Save
3. To add another
4. Follow the direct
5. Click Forms Menu to return to the navigation links.

Objective: ABC Objective
Task Name
Task 1

Task Description
Test

- i. 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

- j. Once one set of Objectives, Tasks, and Performance Measures are complete, you can add a second (or more) 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

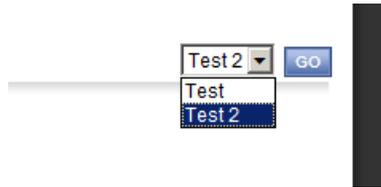
Menu Forms Menu Status Changes Management Tools Related Documents and Messages

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

[Details](#)



- k. 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):



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

The screenshot shows the New York State Grants Gateway application interface. At the top, there is a navigation bar with the logo and the text "New York State Grants Gateway". Below this, there are links for "Home", "Grant Opportunity Portal", and "Applications". On the right side of the navigation bar, there are links for "Training Materials", "Organization(s)", "Profile", and "Logout". Below the navigation bar, there are two buttons: "SAVE" and "CHECK GLOBAL ERRORS".

The main content area has a breadcrumb trail: "Back" (with a left arrow icon), "Menu" (with a list icon), "Forms Menu" (with a right arrow icon), "Status Changes" (with a right arrow icon), "Management Tools" (with a right arrow icon), and "Related Documents and Messages" (with a right arrow icon). Below this, there is a link for "Document Information: DCJ01-ABCD-2013-00001" and a "Details" link (with a right arrow icon).

The section is titled "PRE-SUBMISSION UPLOADS". Underneath, there are "Instructions:" followed by a numbered list:

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.

Below the instructions, there is a paragraph: "This is the area where you can enter specific information that relates to all of your Pre-submission uploads."

The section is titled "Project Plan" and includes the text: "Upload a high level project plan for the initial evaluation". Below this text is a "Browse..." button.

At the bottom, there is a "Document Template" link: "GO_5000008_Testgrant.pdf"



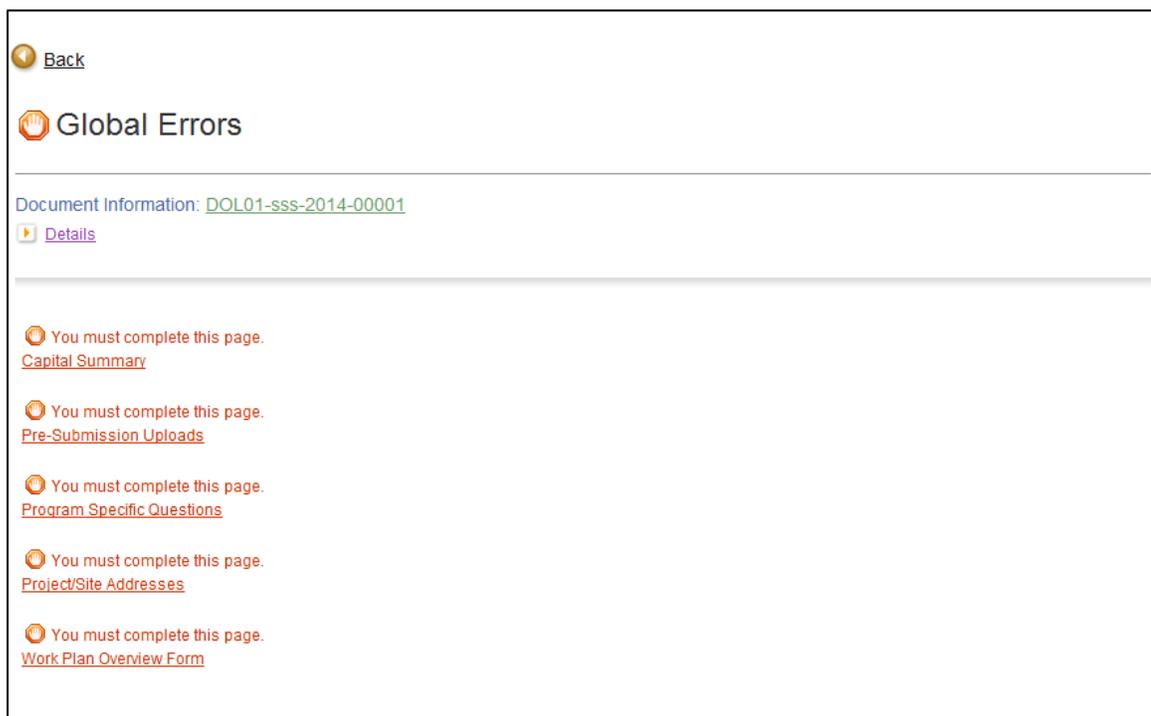
6.2.12.1. Enter all the required information and click on the save button on the Pre-submission upload screen.



6.2.13. Check for Global Errors

6.2.13.1. 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.

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



6.2.13.3. If there are no more Global Errors found in the online application, it is ready to be submitted.



[Back](#)

Global Errors

Document Information: [HCR01-UFT2-2013-00001](#)
[Details](#)

No errors have been found.

[Return to the Forms Menu by clicking here.](#)

6.3. Retrieve Application

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

Login

Username

Password

[Forgot Password?](#)

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

New York State
Grants Gateway

Home | Grant Opportunity Portal | **Applications** | Contracts

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

Welcome A
Grantee
[Change Picture](#)

Instructions:
Select the **SHOW HELP** button above for detailed instructions on the following.
> Using System Messages
> Understanding your Tasks

Hello A, please choose an option below.



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.

Back

Applications

Use the search criteria below, then select the Search button

Search Applications

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

Agency: Office of Victim Services

Group: [dropdown]

- Subgroup: - SELECT -

Grant Opportunity Name: [text box]

Current Application Status: - SELECT -

-OR-

Application Status: - SELECT - From [text box] To [text box]

Application Type: - SELECT -

Organization Legal Name: [text box]

Application Number: [text box]

SEARCH CLEAR

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: Screen Sort by: -- Select -- GO

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 Admin

6.4.1. Start by logging in to Grants Gateway.

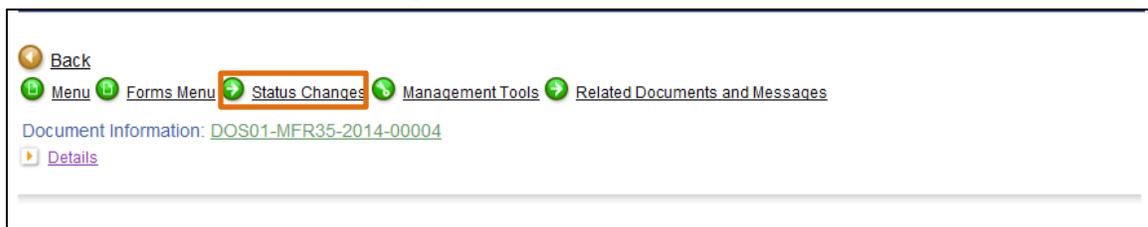
Login
Username
Password

[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.

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

Multiple Funding Rounds Testing 3/5 Menu - Status Options

Select a button below to execute the appropriate status push.

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

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

[Details](#)

Possible Statuses

APPLICATION SUBMITTED

[APPLY STATUS](#)

APPLICATION CANCELLED

[APPLY STATUS](#)

[Top of the Page](#)

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6.4.5. To confirm the status of your Application click on the Details link. 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](#)

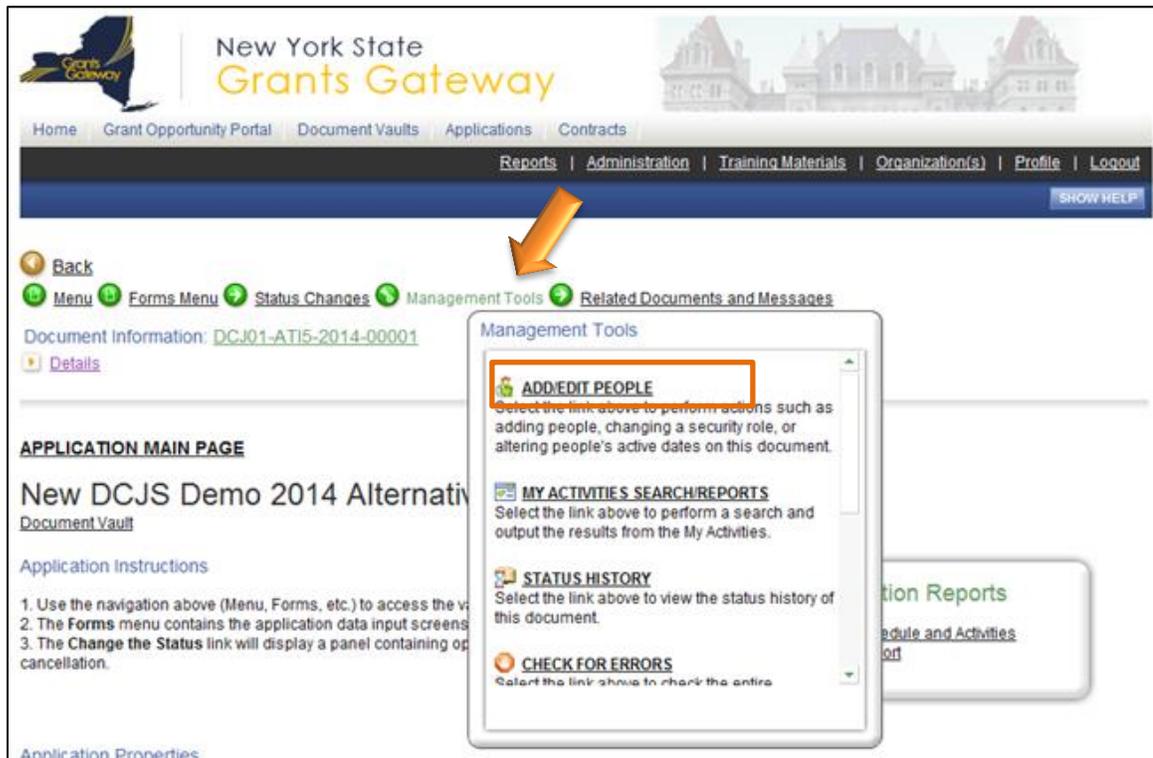
[Details](#)

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

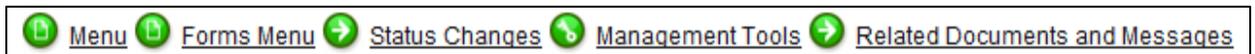


6.5. Add/Edit People tool

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.



6.5.1. Begin by selecting the **Management Tools** link.



6.5.2. Now click on **Add/Edit People**.



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.

STATUS HISTORY

Select the link above to view the status history of this document.

ATTACHMENT REPOSITORY

Select the link above to view all attachments in this document.

6.5.3. 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 0](#), [Current 0](#), [Review 0](#), [Assigned 0](#)
[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="text"/>	
<input type="checkbox"/>	Testing ContractSig Email	Zohra NFP (Grantee Contract Signatory)	Grantee Contract Signatory ▼	<input type="text"/> <input type="text"/>	

6.5.4. 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"/>



6.6. 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.



New York State Grants Gateway

Home | Grant Opportunity Portal | Applications

Training Materials | Organization(s) | Profile | Logout

PRINT SHOW HELP

Agreement

Please make a selection below to continue.

By clicking the **I Agree** button below, you certify and agree that you are authorized on behalf of the applicant and its governing body to commit the applicant 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 Minority-owned Business Enterprise (MBE)/Woman-owned Business Enterprise (WBE) participation. You further certify that the applicant will maintain such records and take such actions necessary to demonstrate such compliance throughout the completion of the project.

I AGREE | I DO NOT AGREE

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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.

New York State Grants Gateway

Home | Grant Opportunity Portal | Applications

Training Materials | Organization(s) | Profile | Logout

SHOW HELP

Back

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Document Information: CFS

Details

APPLICATION MAIN PAGE

Advantage After School Program
Document Vault

Application Instructions

1. Use the navigation above (Menu)
2. The Forms menu contains the
3. The Change the Status link v cancellation.

Application Properties

Project Title	ssdfs	
Total Grant Funds Requested		\$0.00
Total Project Cost		\$0.00

Application Reports

Prompt Contracting and Activities Report

Top of the Page

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



6.6.8.

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

[Details](#)

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



6.7. Tools Available

6.7.1. Grants Reform Website

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

6.7.1.2. 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 displays the New York State Grants Gateway website. At the top, there is a navigation bar with 'New York State', 'State Agencies', and a search box. Below this is a large banner for 'Grants Reform' with the text 'Streamlining State Grant Processes' and an orange arrow pointing to the 'Grantees' tab in the navigation menu. The main content area is titled 'Information for Current and Potential Grantees' and includes sections for 'The Grant Opportunity Portal', 'The Grants Gateway', and 'Prequalification Overview'. A 'Quick Links' sidebar is visible on the left.

New York State | State Agencies | Search all of NY.gov

Grants Reform
New York State's streamlined grant process

Streamlining State Grant Processes

Home | State Agencies | Grantees | Videos

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.

Quick Links

- 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
- Vendor Prequalification Manual



- 6.7.1.3. 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.

The screenshot shows a banner for 'Streamlining State Grant Processes'. On the left is the 'Grants Reform' logo with the tagline 'New York State's streamlined grant process'. The main text reads 'Streamlining State Grant Processes'. Below the banner is a navigation bar with links: Home | State Agencies | Grantees | Videos. A 'Quick Links' sidebar contains: Grants Gateway, Registration Form for Administrator, and Sample Organization Charts. The main content area is titled 'Information for Current and Potential Grantees' and states: '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.'

- 6.7.2. 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.

The screenshot shows the Grants Gateway user interface. At the top is the 'New York State Grants Gateway' header. Below it is a navigation bar with links: Home | Grant Opportunity Portal. A top black ribbon contains links: Training Materials | Organization(s) | Profile | Logout, and buttons: CHECK GLOBAL ERRORS | SHOW HELP. The main content area is titled 'My Organization Information' with a 'Back' button and the instruction 'Please complete all required forms below.' Below this is a 'Details' button. A 'My Training Materials' section contains the instruction 'Click on the link(s) to open, view or print the training materials' and a list of tutorials: Vendor User Guide and Vendor Policy Manual. A 'CLOSE' button is located at the bottom right of the training materials section.



7. Helpful Information/Links

- www.grantsreform.ny.gov/grantees
- Grants Reform on YouTube:
<http://www.youtube.com/channel/UCYnWskVc7B3ajjOVfOHL6UA>
- Agate Help Desk
 - Phone: 1-800-820-1890
 - Email: helpdesk@agatesoftware.com
(Technical questions)
- Grants Team Email: 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.