



**Office of Cannabis
Management**

eGrants Registration

The Opportunity Search and Registration Process

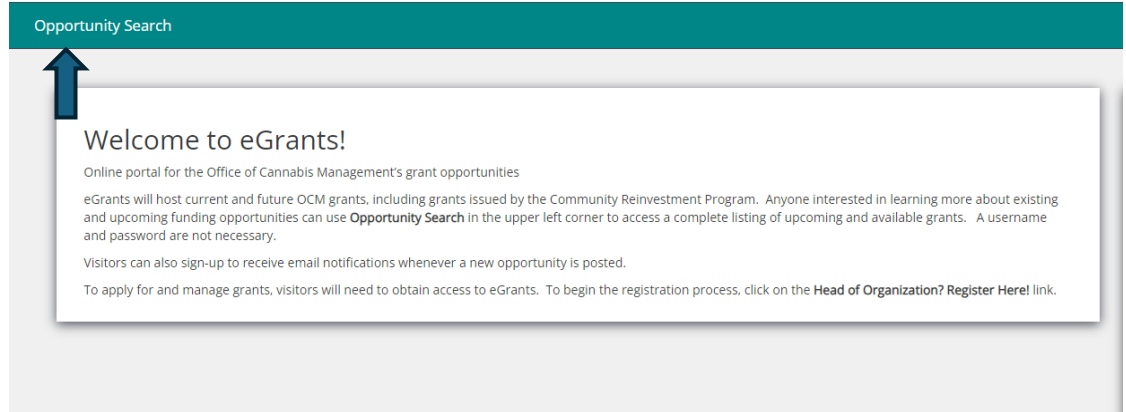
OCTOBER 15, 2024

AGENDA

- The Opportunity Portal
 - Grant Opportunity Search
 - Opportunity Details
- Registration Overview
 - Online Registration Form
 - Request Processing
- Initial Login
 - Organization Information
 - Members
- Support and Assistance

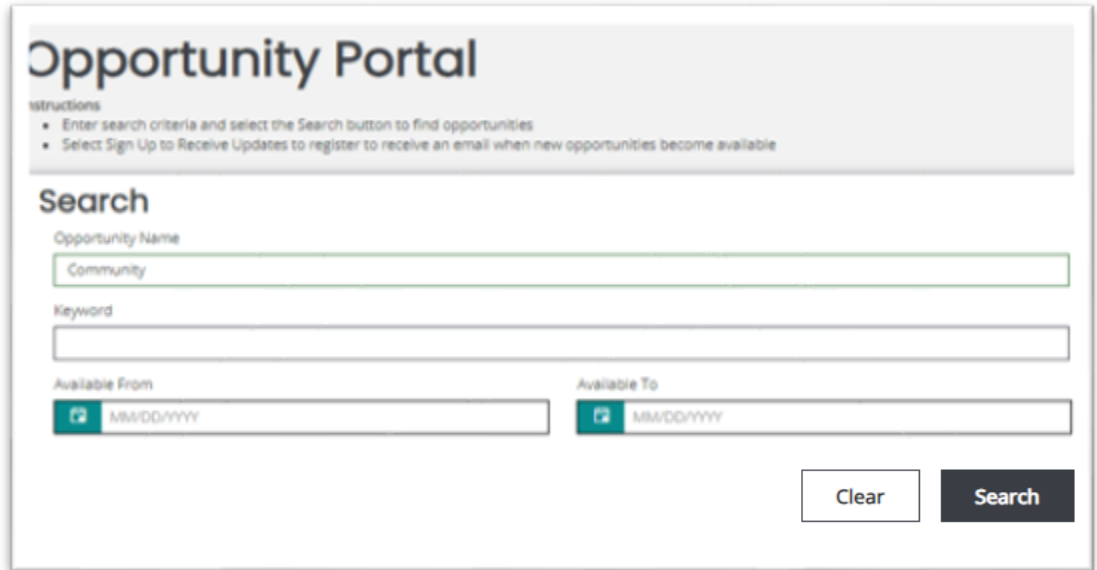
THE OPPORTUNITY PORTAL

- Prospective grantees can use the Opportunity Portal to search for upcoming and available OCM grant opportunities.
- Users can also sign up to receive email notification when new grants become available
- Click **Opportunity Search** on the eGrants Login Page to access the portal.
- Login credentials are not required.



OPPORTUNITY SEARCH

- Opportunities can be searched in a variety of ways, including by:
 - Name
 - Keywords
 - Availability
- Availability Date From is the date potential grantees can begin submitting applications.
- Available To is the last date applications can be initiated. In most instances this will also be the Due Date for applications.



The screenshot shows the 'Opportunity Portal' search interface. At the top, the title 'Opportunity Portal' is displayed. Below it, there are instructions: 'Enter search criteria and select the Search button to find opportunities' and 'Select Sign Up to Receive Updates to register to receive an email when new opportunities become available'. The search section includes a 'Search' heading and four input fields: 'Opportunity Name' (containing 'Community'), 'Keyword' (empty), 'Available From' (with a calendar icon and 'MM/DD/YYYY' placeholder), and 'Available To' (with a calendar icon and 'MM/DD/YYYY' placeholder). At the bottom right, there are two buttons: a white 'Clear' button and a dark blue 'Search' button.

OPPORTUNITY DETAILS

- Click on the Name link in the search result for an overview of the opportunity, availability dates, and other key information.

Name	Availability	Due Date
Community Reinvestment Program Grants	1/1/2023 12:00:00 AM - 12/3/2025 11:59:00 PM	12/3/2024 5:00:00 PM

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- To apply for a grant, your Organization **must register** in the eGrants system.

Opportunity Details

Availability Period	Due Date
1/1/2023 12:00:00 AM - 12/3/2025 11:59:00 PM	12/3/2024 5:00:00 PM

Description

Grant Opportunity Name: Community Reinvestment Program Grants

Provided By: New York State Office of Cannabis Management

Overview: The Community Reinvestment Program issues grants to communities disproportionately affected by prior federal and state actions, from housing to childcare to job skills training and many areas in between. The grants are not limited to activities related to cannabis. Individuals ages 0-24 years in designated geographies of New York State are eligible to apply.

REGISTRATION OVERVIEW

- The Head of Organization for the entity seeking eGrants access must complete the Registration process. The Head of Organization is typically the Chief Executive Officer, Chief Operating Officer, or an individual with a similar title.
- Click the **Head of Organization? Register Here!** link get started.



Office of Cannabis
Management

Opportunity Search

Welcome to eGrants!

Online portal for the Office of Cannabis Management's grant opportunities

eGrants will host current and future OCM grants, including grants issued by the Community Reinvestment Program. Anyone interested in learning more about existing and upcoming funding opportunities can use Opportunity Search in the upper left corner to access a complete listing of upcoming and available grants. A username and password are not necessary.

Visitors can also sign-up to receive email notifications whenever a new opportunity is posted.

To apply for and manage grants, visitors will need to obtain access to eGrants. To begin the registration process, click on the **Head of Organization? Register Here!** link.

Login

Username

Password

Log In

[Forgot Username/Password!](#)

[Head of Organization? Register Here!](#)



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ONLINE REGISTRATION FORM

- The Head of Organization will complete the online Registration form and click the **Register** button at the bottom of the page to submit their request.
- Complete all Required fields.
- Provide a Head of Organization Email address you check regularly.
- Store your proposed credentials in a safe place. You will need them if access is granted.
- If you do not have a SFS Supplier ID, leave the field blank. Assistance will be provided during the Registration review process.

Head of Organization Registration

Instructions:

1. An organizational account should be requested by an executive or head of your organization. This will be your primary contact. Once an organization's account with a primary contact is created, user access is managed from within your organization.
2. An organization should enter the exact name shown on its charter or other legal documents that created the organization. Do not abbreviate names. For individuals, enter the name of the person who will do business with NYS as it appears on the Social Security card or other required Federal tax documents.
3. Enter your 10 digit SFS ID. If you do not have an SFS ID, leave blank
4. The EIN provided must correspond to the name in the "Organization Legally Incorporated Name" box . For individuals, this is your social security number (SSN).

Head of Organization First Name *	Head of Organization Middle Name	
<input type="text"/>	<input type="text"/>	
Head of Organization Last Name *	Head of Organization Prefix	Head of Organization Suffix
<input type="text"/>	<input type="text" value=""/>	<input type="text" value=""/>
Head of Organization Title *		
<input type="text"/>		

REQUEST PROCESSING

- Registration requests will be reviewed by the New York State Grants Management Team.
- The Grants Management Team will verify the SFS Supplier ID contained on the registration form, create the corresponding eGrants account, and notify the Head of Organization by email. Expect this process to take 3 to 5 days.
- If the Grants Management Team is unable to verify the SFS Supplier ID provided or the organization does not have a Supplier ID, the Head of Organization will be contacted via email regarding next steps.
- Where needed, the Grants Management Team will help the Head of Organization navigate the process of registering in SFS and obtaining a Supplier ID. This can add an additional 3 to 7 days to the overall eGrants registration process. Once the SFS Supplier ID is obtained, the eGrants registration will be completed and the Head of Organization will be notified.

INITIAL ACTIVITIES

- Once granted access, the Head of Organization should login and validate their Person and Organization profile.
- After entering Username and Password, the Dashboard is displayed.
- Click your Name then click Profile to start the process.

The screenshot shows the Office of Cannabis Management dashboard. At the top right, the user's name "John Smith" is displayed next to a dropdown menu. A blue arrow points to the "Profile" option in the dropdown. The dashboard includes sections for "My Tasks", "My Opportunities", and "Announcements".

My Opportunities Table:

Name	Provider	Availability	Description
Community Reinvestment Program	WFOCM Provider Org	1/1/2023 12:00:00 AM - 12/31/2023 11:59:59 PM	

PERSON INFORMATION

- The Profile section displays the Basic and Contact information for the user. Although not displayed below, the Profile also allows users to update their Username, Password, or both.
- The Organization section displays the entities the user has access to and their corresponding role(s).
- Use the Navigation Bar on the lefthand side of the screen to access each form.

The screenshot shows a web application interface for 'Person Information'. The top navigation bar includes 'Home', 'Searches', and a user profile for 'John Smith'. The left sidebar lists navigation options: 'Organization Information', 'Lake George Housing', 'Organization Information', 'Organization Members', and 'Additional Addresses'. The main content area is titled 'Person Information' and contains a 'Profile' section with 'Basic Information' and an 'Organizations' table.

Profile - Basic Information

First Name	<input type="text" value="John"/>	Middle Name	<input type="text"/>
Last Name	<input type="text" value="Smith"/>	Prefix	<input type="text"/>
		Suffix	<input type="text"/>
Title	<input type="text" value="CEO"/>		

Organizations

Role Name	Active Date	Inactive Date	Assigned By
Grantee Official	9/25/2024		Hamilton, Kristen

ORGANIZATION INFORMATION

- The General Information and Additional Information sections - not shown - display content used to keep your eGrants and SFS profiles consistent. Key fields such as Vendor Name can only be updated by the Grants Management Team.
- Not-For-Profits are encouraged to enter their **NYS Charities Registration Number** or **Exemption Code**. While not necessary to apply for a grant, these data points will be needed should you receive a contract.

Organization Information

Instructions:

- From this page, you can edit the organization's General Information, Contact Information, and Business Address.
- To view current organization members or add a new organization member, click the option for "Organization Members" in the left side navigation.
- A sectarian organization is defined as one which is affiliated with a particular religious group. A non-sectarian organization has no religious affiliation.

Information

General Information

Vendor Name *
Lake George Housing

EIN *
12-3456789

Contact Information

Organization Phone
(518) 123-4567

Organization Email

NYS Charities Registration Number

NYS Charities Exemption Code

ADDITIONAL ADDRESSES

- Complete the Additional Addresses form the first time you login. These addresses are required to submit a grant application, so it is best to provide them at your earliest convenience.
- Use the checkboxes to indicate if the **Payment Address** and **Additional Mailing Address** are the same as the primary **Business Address** listed on the Organization Information form. If not, type the information into the form.

The screenshot displays a form titled "Additional Addresses" with two main sections:

- Payment Address**: Includes a checked checkbox labeled "Check if the same as primary business address".
- Additional Mailing Address**: Includes a checked checkbox labeled "Check if the same as primary business address" and an empty text input field labeled "Address" with a red asterisk indicating a required field.

ORGANIZATION MEMBERS

Organization Members displays users that have access to the organization's online profile. During the Registration process, the Grants Management Team assigns the Head of Organization the Grantee Official role. This role allows the Head of Organization to create additional members and assign them roles according to need.

Organization Members

Instructions:

- Use the available search criteria to filter the members table.
- To add a new member, click the Add New button and follow the instructions.
- You can limit system access by setting the Active/inactive dates.

Members Search

Members

Person Name	Role Name
Smith, John	Grantee Official

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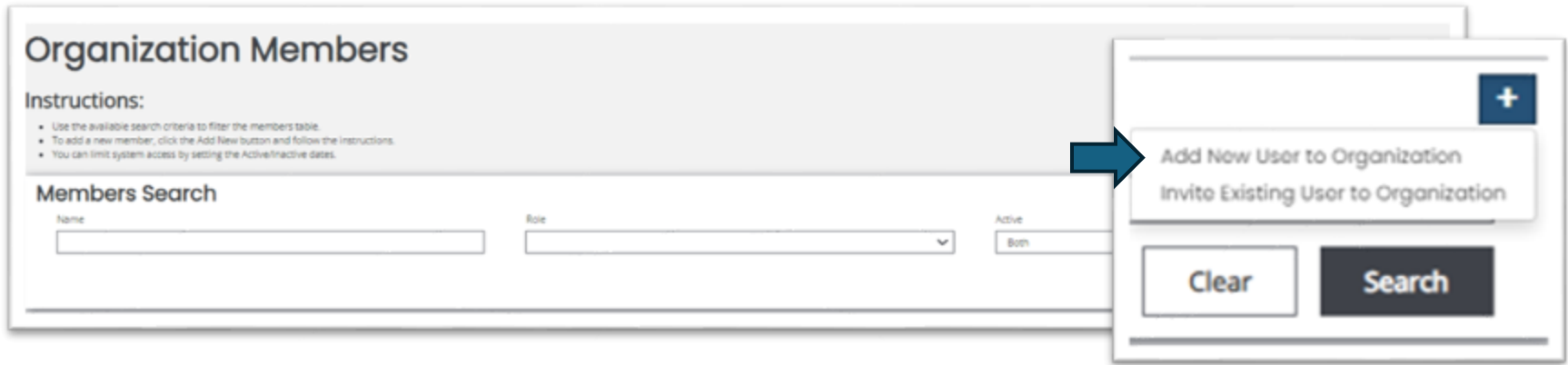
Active: Both

Clear Search

Inactive Date	Last Modified By	Last Modified By Date
	Hamilton, Kristen	09/25/24

ADDING NEW MEMBERS

- To add a new member, the Grantee Official clicks the **Plus** button followed by the **Add New User to Organization** link. This creates a brand new eGrants account that is only linked to the organization.
- While it is possible to have a single account that is linked to more than one organization, this can add unnecessary complexity and is not recommended.



The screenshot displays the 'Organization Members' interface. At the top left, the title 'Organization Members' is followed by 'Instructions:' and a list of three bullet points: 'Use the available search criteria to filter the members table.', 'To add a new member, click the Add New button and follow the instructions.', and 'You can limit system access by setting the Active/Inactive dates.' Below this is the 'Members Search' section, which includes a 'Name' input field, a 'Role' dropdown menu, and an 'Active' dropdown menu currently set to 'Both'. A blue arrow points from the 'Add New User to Organization' link in the dropdown menu to the main interface. The dropdown menu also contains 'Invite Existing User to Organization', 'Clear', and 'Search' buttons.

ADD PERSON

Add Person

Instructions:

- Enter new Person information and click the Save button.
- New Person will be added to Organization currently being viewed.

General Information

First Name

Middle Name

Last Name

Title

Assign Roles

Role

Active Date

Inactive Date



Security Information

Username

Password

Confirm Password

- The Grantee Official must complete the Add Person form to create a new eGrants user. The steps are as follows:
 - Provide General Information such as Name and Title
 - Provide Contact Information such as email address – not shown
 - Assign a user Role
 - Set the Active and Inactive Date
 - Create a Temporary Username and Password
- After clicking the Save button to create the account, the Grantee Official must notify the new user their credentials consistent with their organization's internal controls. eGrants does not send automated notifications.

EGRANTS ROLES

The following Grantee roles are available for assignment:

- **Grantee Official** – The most powerful of Grantee roles, Grantee Official provides the ability to manage organization members and their corresponding roles. It also allows the user to initiate, complete, and submit grant applications. Downstream, this role can manage contracts as well as initiate, complete and submit financial, compliance, and progress reports. Heads of Organization are strongly encouraged to assign this role sparingly.
- **Grantee Administrator** – The Grantee Administrator is also a powerful role. Although this role CANNOT manage organization members, it can perform all other functions available to the Grantee Official.
- **Grantee Staff** – Grantee Staff CANNOT manage organization members, initiate or submit grant applications and other downstream transactions. However, the role allows the user to assist in the process of completing applications and other downstream transactions.
- **Grantee Fiscal** – Limited to functions associated with downstream transactions, specifically requests for reimbursement against approved contracts. Not relevant to applications.
- **Grantee Viewer** – View only access

ACCESS MANAGEMENT

- Heads of Organization are strongly encouraged to develop internal controls related to eGrants access for their employees. At minimum, these controls should include a regularly scheduled reviews of existing access, level of access, and continued need.
- In the event of staff changes, organization members access and roles can be updated on each Members Profile link located on the Organization Members page.
- Only users with the Grantee Official role have the ability to manage organization members and their corresponding roles
- Member Profile information (Basic Information) and active and inactive dates can be updated on the profile page.
- Additional Roles can be added to the user by using the plus (+) button.

The screenshot displays the 'Organization Members' management interface. It includes a search section, a table of current members, and a detailed profile for a selected member. The profile shows basic information, contact details, and a list of roles assigned to the user.

Organization Members

Instructions:

- Use the available search criteria to filter the members table.
- To add a new member, click the Add New button and follow the instructions.
- You can limit system access by setting the Active/Inactive dates.

Members Search

Name: Role:

Members

Person Name	Role Name	Active Date	Inactive Date
Doe, jim	Grantee Staff	10/03/24	
Smith, jane	Grantee Official	09/08/24	

Person Information

• Edit person profile and organization role information.

Profile

Basic Information

First Name:

Last Name:

Title:

Contact Information

Primary Phone:

Organizations

Greater Hudson Area Swim Club

Role Name	Active Date	Inactive Date	Assigned By
Grantee Staff	<input type="text" value="10/03/2024"/>	<input type="text" value="MM/DD/YYYY"/>	Smith, Jane

PREQUALIFICATION

- Nonprofit organizations must Prequalify to do business with New York State agencies before they can compete for State grants. This process allows nonprofits to address questions and concerns prior to entering a competitive bid process.
- Although Prequalification occurs in SFS and NOT eGrants, the importance of beginning the process as soon as possible warrants its mention.
- **Grant proposals from nonprofits that are not prequalified in SFS at the application due date and time will not be evaluated.**
- A wide range of resources are available on the Grants Management website's [Prequalification](#) page to facilitate the prequalification process. Nonprofit applicants are encouraged to review the [NYS Prequalification Manual](#) The SFS [Grantee User Manual](#) and virtual [Entering and Submitting Prequalification Applications](#) training are also helpful.

SUPPORT AND ASSISTANCE

- **Registration**

- All OCM eGrants system registration questions should be directed to ITS Grants Management at grantsmanagement@its.ny.gov. Include “OCM eGrants Registration” in the subject line.

- **Prequalification**

- All questions regarding Prequalification should be sent to the SFS Helpdesk at helpdesk@sfs.ny.gov or call 518-457-7717.



Office of Cannabis Management