

## CREATING, MAINTAINING, AND UPDATING THE DOCUMENT VAULT

**Initiate, complete and submit your online application**

**Log in to Grants Gateway using your Credentials.**

**Click on the View Opportunities button under View Available Opportunities.**

**In the Search Criteria enter the Grant Opportunity name and/or select the Funding Agency and hit the Search button.**

**Click on the name of the Grant Opportunity from the search results grid.**

**Start creating your application by going to Forms Menu and filling in all the required forms.**

### Create a Document Vault

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

In general, a Not-for-Profit retains its prequalified status for a period of three years, as long as the organization keeps the information in the Document Vault up to date. Recent improvements to the system have made it easier than ever for a Not-for-Profit to maintain its prequalified status.

If you need to save your work and come back later, you can do so. To retrieve the application you already started, click on the Applications link located at the top of your home screen and enter search criteria to locate the application. The system will display the application you have already started. Click on the application number to restart the application where you left it earlier. It is very important you do not click “Apply for Grant Opportunity” again 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.

To check your application for errors, click on the “Check for Errors” link under the management tools link. This will provide you with a list of errors that need to be corrected before submission.

In order to submit your online application, click on the Status Changes link located at the top of your application main page. Click on the APPLY STATUS button located under APPLICATION SUBMITTED.

Prior to final submission, you will need to certify the agreement. 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.

To check the current status of your Application, click on the Details link. When you are working on your Application, the application status will say “Application in Process.” After you submit your application, the application status in the Details grid will say “Assignment of Reviewers.” This status means you have successfully submitted an application.

### 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:

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

Enter your information in the required fields. NOTE: Required fields are marked with an\*



# THE GRANTS GATEWAY

## User Guide



**SENATOR ROXANNE J. PERSAUD • 19<sup>TH</sup> SENATE DISTRICT**

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Dear Friend,

There are hundreds of funding opportunities available for not-for-profit agencies to secure grants for their organizations. Whether it's federal, state, local or private, these resources can provide much needed support to groups in need. However, the grant process and the paperwork that goes along with it can be overwhelming.

That is why I created this user guide as a companion piece to my monthly publication entitled “Pathways to Funding.” This publication provides you with step-by-step instructions on how to review, register, pre-qualify and apply for all types of grants.

A good starting point is with New York State funding, and I highly encourage you to visit

the NYS Grants Gateway through the online portal at [grantsgateway.ny.gov](http://grantsgateway.ny.gov). This online portal is available to the public, providing one-stop shopping for anyone interested in locating grant funding opportunities with State agencies. The New York State Grants Gateway serves as the primary outlet for State agencies to post upcoming and available funding opportunities.

As always, if you have any questions or concerns, my office is here to help. Feel free to call or stop by. We are here to serve you.



Roxanne J. Persaud  
19th Senate District



# HOW DO I GET STARTED WITHIN NEW YORK STATE?

## ***Browse and Search the Grants Gateway through the grant opportunity portal***

Visit the NYS Grants Gateway at [grantsgateway.ny.gov](https://grantsgateway.ny.gov). You can browse/search for available grant opportunities in the portal by clicking on the browse or search button. Browsing allows you to view all available grants. The search button allows you to narrow and define your search to a particular grant or area of focus.

## ***Register for the Grants Gateway (All Vendors)***

To apply for the opportunity, you must be registered with the Grants Gateway. If your organization is not registered in the Grants Gateway, click on the “Request Access Now” link for instructions and the registration form.

On the Grants Reform website, download a copy of the Registration Form for Administrator. A signed, notarized original form must be sent to the address provided in the instructions.

Once the registration form has been received in the mail, it will take approximately a week to get you registered. You will receive your username and temporary password via email once the registration has been completed, allowing you to then apply for grants on the Gateway.

If you have previously registered and do not know your username, please email [grantsreform@its.ny.gov](mailto:grantsreform@its.ny.gov). If you do not know your password please click the Forgot Password link from the main login page and follow the prompts.

If your organization is a Not-for-Profit, you must be prequalified prior to the due date of the opportunity for your application to be reviewed.



## ***Complete your Prequalification Application (Non-exempt Not-for-Profits)***

Login to the Grants Gateway. If this is your first time logging in, you will be prompted to change your password at the bottom of your profile page. Enter a new password and click SAVE.

Click the Organization(s) link at the top of the page and complete the required fields including selecting the State agency you have the most grants with. This page should be completed in its entirety before you SAVE. A Document Vault link will become available near the top of the page. Click this link to access the main Document Vault page.

Answer the questions in the Required Forms and upload Required Documents. This constitutes your Prequalification Application. Optional documents are not required unless specified in a Request For Proposal or requested by a State agency.

Specific questions about the prequalification process should be referred to your agency representative or to the Grants Reform Team at [grantsreform@its.ny.gov](mailto:grantsreform@its.ny.gov).

Certain not-for-profit organizations may request exemption from prequalification. These organizations must document their exemption at the time they register for the Gateway. Visit the Prequalification Exemption Quick Link for a listing of those organizations that may request exemption, and to learn more.

<https://grantsmanagement.ny.gov/system/files/documents/2019/01/grants-gateway-prequalification-exemption-request-form.pdf>

## ***Submit Your Prequalification Application (Not-for-Profits)***

After completing your Prequalification Application, click the Submit Document Vault link located below the Required Documents section to submit your Prequalification Application for State agency review. Once submitted, the status of the Document Vault will change to In Review.

If your Prequalification reviewer has questions or requests changes, you will receive email notification from the Gateway system.

Once your Prequalification Application has been approved, you will receive a Gateway notification that you are now prequalified to do business with New York State.

***\*\*Vendors are strongly encouraged to begin the process as soon as possible in order to participate in upcoming funding opportunities.***

## ***Establish a Delegated Administrator***

Once your organization is registered and prequalified (if applicable) in the Grants Gateway, the user with the Delegated Administrator Role will have to create additional roles to initiate, complete, and submit the application in Grants Gateway.

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**