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Organization Registration User Guide

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Organization Registration User Guide

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Introduction

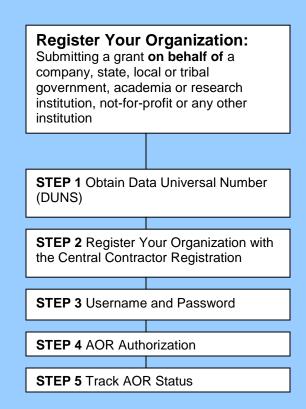
Grants.gov has been designed to make it easier for organizations to find and apply for more than \$500 billion in federal grants. With electronic access to more than 1,000 grant programs offered by all federal grant-making agencies, Grants.gov leverages the power of the Web to streamline your grant acquisition process.

This user guide has been developed to help you navigate the Grants.gov environment more easily. In it, you'll find detailed instructions for registering your organization.

Get Registered: Overview

Organization Registration

This is an overview of the steps you will take during the registration process.



Register Your Organization

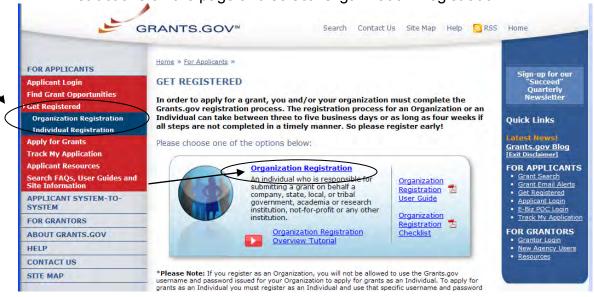
Review this overview if you are submitting a grant **on behalf of** a company, state, local or tribal government, academia or research institution, not-for-profit or any other institution.

Instructions for Registering your Organization:

1. Start registering your organization by selecting **Get Registered** in the navigation bar on the left navigation menu.



2. On the Get Registered screen, you will be presented with two options. Select **Organization Registration** in the left navigation bar or follow the instructions on the page and select "Organization Registration."



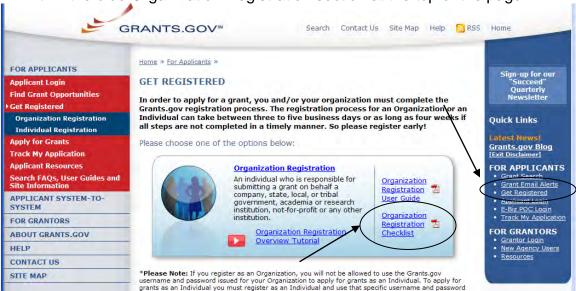
Registration Checklist for Organizations

In order to help you navigate the process of registering your organization, Grants.gov has developed a registration checklist.

Follow the steps below to review the Registration Checklist for Organizations.

 To access the Registration Checklist for Organizations, select Get Registered from the Quick Links on the right side of the screen in the blue boxed navigation of any Grants.gov page.

2. On the **Get Registered** page, select **Organization Registration Checklist** within the blue Organization Registration section at the top of the page.

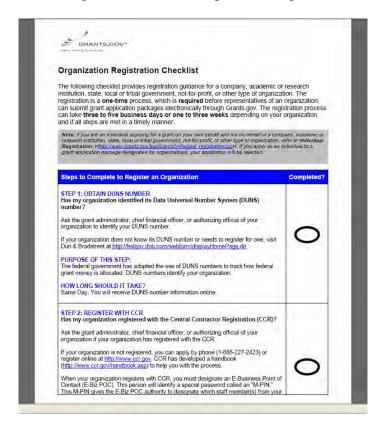


3. The Organization Registration Checklist also appears on the **Organization Registration** page at the top of the screen. Select **Get Registered**, then select **Organization Registration** and select the link for the **Organization**



The Organization Registration Checklist is a PDF document, which you may review on-screen or print and retain for future reference.

The checklist helps guide you through completing the organization registration steps required to submit grants online through Grants.gov.



Step 1: Obtaining a DUNS Number

In order to register with the Central Contractor Registration (CCR), a requirement for registering with Grants.gov, your organization will need a Data Universal Number System (DUNS) Number. A DUNS Number is a unique nine-character identification number provided by the commercial company Dun & Bradstreet (D&B). Once you have completed the registration, your DUNS Number should be available the next business day.

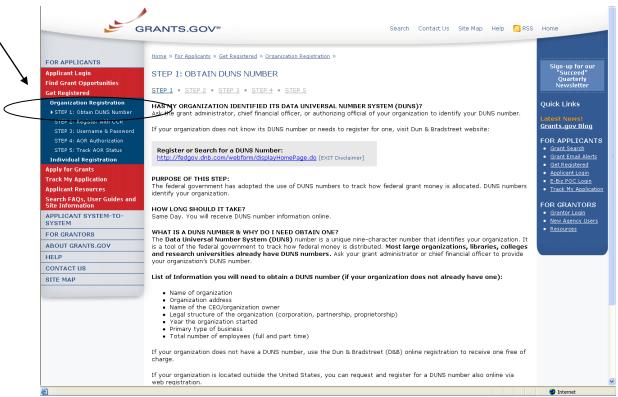
Have the following information prepared when requesting a DUNS Number:

- Name of your organization
- Organization address
- Phone number of the organization
- Name of the CEO/organization owner
- Legal structure of the organization (corporation, partnership, proprietorship)
- Year the organization started
- Primary line of business
- Total number of employees (full and part time)

Note: As a result of obtaining a DUNS Number, you have the option to be included on D&B's marketing list that is sold to other companies. If you do not want your name/organization included on this marketing list, request not to be listed when you contact D&B.

Instructions for Requesting a DUNS Number

On Grants.gov under, For Applicants >> Get Registered >> Organization Registration, select **Step 1: Obtain DUNS Number** to register online.



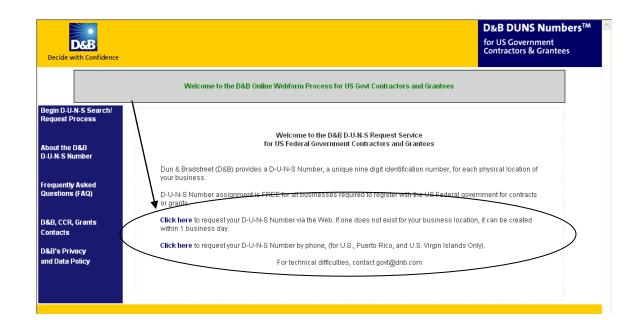
Requesting a DUNS Number is a process that is not completed on the Grants.gov website. The following steps below provide an overview of the process to request a DUNS Number on D&B's website:

1. Check to see if your Organization has a DUNS Number:

Prior to requesting a DUNS Number, you should investigate if your organization already has a DUNS Number. Most large organizations, independent libraries, colleges and research universities already have DUNS Numbers. Ask your organization's chief financial officer, grant administrator, or authorizing official to provide your organization's DUNS Number. Alternatively, you can determine if your organization has a DUNS Number online by using the DUNS search.

2. Register for a DUNS Number:

If your organization does not have a DUNS Number, ask the chief financial officer, grant administrator, or authorizing official of your organization to register for a DUNS Number. Or request a DUNS Number online via web-registration. The process can take up to one business day to complete. If your organization is located outside of the United States, you can also request and register for a DUNS Number online via web-registration.



Step 2: Register with CCR

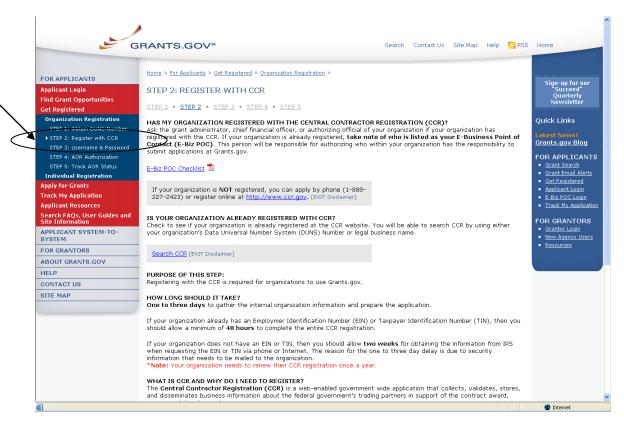
The Central Contractor Registration (CCR) is a government-wide registry for vendors doing business with the federal government. The CCR centralizes information about grant recipients and also provides a central location for grant recipients to change organizational information. Grants.gov uses the CCR to establish roles and IDs for electronic grant applicants.

Tips for registering with CCR

- 1. Information for registering with the CCR and online documents can be found at http://www.ccr.gov/.
- 2. Before registering, applicants and recipients should review the Central Contractor Registration user guide at https://www.bpn.gov/ccr/doc/UserAccount.pdf.

Instructions for Registering with CCR

On Grants.gov under For Applicants >> Get Registered >> Organization Registration, select <u>Step 2: Register with CCR</u> in the left navigation to register online.



Registering with CCR is a process that is not completed on the Grants.gov website. The following steps below provide an overview of the process to register on CCR's website:

If your organization has the necessary information ready, online registration will take about 30 minutes to complete, depending upon the size and complexity of your organization. Once your CCR registration becomes active, you will be able to return to Grants.gov and complete registration. It will take up to three to five business days or up to two weeks before your CCR Registration becomes active. If you are updating or renewing your registration information it will take approximately 24 hours to become active.

- 1. Visit the CCR website at http://www.ccr.gov/.
- 2. Select the Start New Registration under the New CCR users.



3. Next, follow the on-screen instructions to complete registration with CCR.

Register Your Organization: CCR Registration Worksheet

General Information

Enter information into all fields with a green required data box placed next to the line. You will be unable to submit your registration online unless all of the mandatory information is provided. Additional information about specific fields is listed below: To register fill out the following information.

Cage Code

For U.S. applicants do not enter a Cage Code. One will be assigned. For foreign applicants, follow the instructions in the CCR.

Legal Business Name

Enter the name of the business or entity as it appears on legal documents.

Business Name

Enter the name of the organization/entity which is applying for a grant.

Annual Revenue

For some organizations/entities this can be an annual budget.

Type of Organization

In this section, indicate whether the organization/entity is Tax Exempt or Not. Indicate what type or how the organization is recognized. Use "Other" if the organization does not fit in the designated categories.

Owner Information

Fill in if a sole proprietorship.

Business Types

As indicated, check all that apply. Check the ones that are the closest description to your organization. Most grant applicants can use "Nonprofit Institution" plus any other type that may fit the description. (The listing is being revised to include grant applicants' business types.)

Party Performing Certification

Enter information only if the organization has a certification from SBA. Most grant recipients and applicants do not fall into this category.

Goods and Services

Mandatory. It will require the grant applicant/recipient to look up a code and enter the ones that best fit the type of services the organization provides. It is not required to fill-in all the spaces provided for the codes.

NAICS Code

Mandatory. Follow the instructions.

SIC Code

Mandatory. Follow the instructions.

Financial Information

Follow the instructions found under "US Federal TIN" (more details can be found on page 9 in the CCR user guide) – the Tax Identification Number information will be validated at IRS;

https://www.bpn.gov/ccr/doc/UserAccount.pdf (Financial information can be found on pg 16 in the user guide)

Registration Acknowledgement and Point of Contact Information

Enter information into all fields with green required data box placed next to the line. You will be unable to submit your registration online unless all of the mandatory information is provided. Additional information about specific fields is listed below:

CCR Point of Contact

Mandatory. Enter the name of the person that knows and acknowledges that the information in the CCR is current, accurate and complete. The Primary and the alternate POC are the only people authorized to share the information with the CCR Assistance Center personnel. An email address is required. An alternate is also required for registration.

Government Business Point of Contact

Not mandatory; review under "Point of Contact;" https://www.bpn.gov/ccr/doc/UserAccount.pdf (Point of Contact information can be found on pg 18 in the user guide)

Electronic Business Point of Contact

Mandatory. The E-Business Point of Contact is the individual designated by your organization who will become the sole authority within the organization to designate, or revoke, an individual's ability to submit grant applications on behalf of his organization through Grants.gov. Your email address and phone number are required. An alternate is also required for registration. The Grants.gov E-Business Point of Contact will have the responsibility of assigning the "Authorized Applicant" role to all who register to submit applications for their organization. The E-Business Point of Contact will receive an email each time someone registers with Grants.gov in order to be able to submit applications on behalf of their organization. The E-Business Point of Contact will need to log in to the E-Business Point of Contact section of Grants.gov and manually assign the "Authorized Applicant" role to designate someone as an "Authorized Organization Representative (AOR)."

Past Performance Point of Contact

Not mandatory.

Marketing Partner ID (MPIN)

Mandatory. This is a self-defined access code that will be shared with authorized electronic partner applications. The MPIN will act as your password in other systems. The MPIN must be nine positions and contain at least one alpha character, one number and no spaces or special characters. The E-Business Point of Contact designated by your organization will need to know the MPIN to log in to Grants.gov.

Registration Notification

If your registration was submitted successfully then you will receive an email welcoming you to CCR. It will take up to three to five business days or up to two weeks before your CCR Registration becomes active. If you are updating or renewing your registration information it will take approximately 24 hours to become active.

Once the CCR Registration is complete, your organization is finished registering. Now you must return to Grants.gov to continue registration and establish yourself as an Authorized Organization Representative (AOR). Only an AOR is authorized to submit grant applications for your organization.

Step 3: Username & Password

In order to safeguard the security of your electronic information, Grants.gov requires all users to create an account in the Grants.gov system. In order to access the account the user must verify that they are able to obtain a username and password. This process determines that someone really is who he/she claims to be.

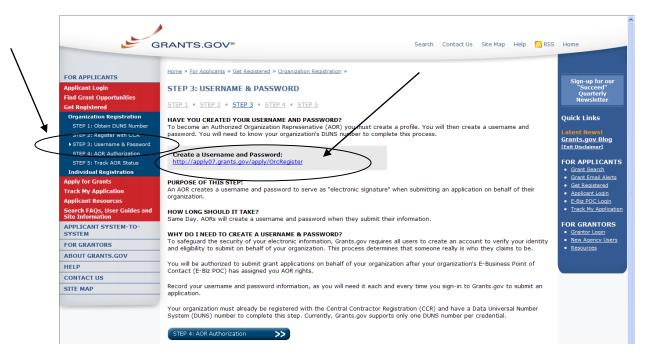
Tips for obtaining your username and password

- 1. Your **CCR registration must be complete** and active before you can obtain your username and password.
- 2. Once you have completed the online CCR Registration, it will take up to three to five business days before your CCR Registration becomes active. If you are updating or renewing your registration information it will take approximately 24 hours to become active.
- 3. Upon completing the online form on Grants.gov, you will create a username and password. This username and password is used to submit your application package to the appropriate government agency safely and securely through Grants.gov.

Instructions for obtaining your Username and Password

Your organization's CCR registration must be complete and active before you can obtain a username and password.

- 1. Select **Get Registered** in the Quick Links on the blue boxed left navigation of any Grants.gov page. This will take you to the Get Registered screen.
- 2. Under the Get Registered heading, select **Organization Registration** in the left navigation.
- 3. Under Organization Registration, select **STEP 3: Username & Password**.
- 4. Once you are on **STEP 3: Username & Password** screen, select the link Create Username and Password in the gray bar on the screen.

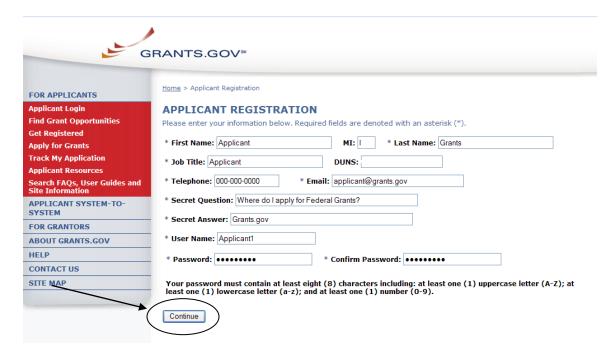


 At the bottom of the screen you will need to enter your organization's DUNS Number and select the **Register** button. Your organization's CCR registration must be complete and active before you can create a Grants.gov account.

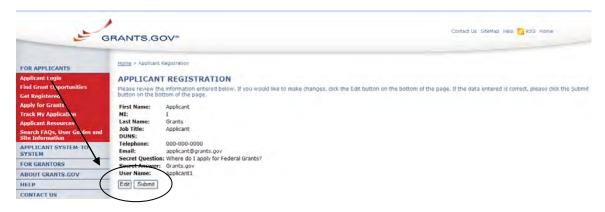


- 6. After entering your organization's DUNS Number, you will be taken to the online form.
- 7. Complete the form. When entering an email address, please keep in mind that all correspondence with Grants.gov will be sent to that email address. For the Secret Question/Answer fields, enter a question only you would be able to answer and will be able to remember in the future. The password you choose must contain at least eight (8) characters including: at least one

(1) uppercase letter (A-Z); at least one (1) lowercase letter (a-z); and at least one (1) number (0-9). When you have completed the form select the **Continue** button.



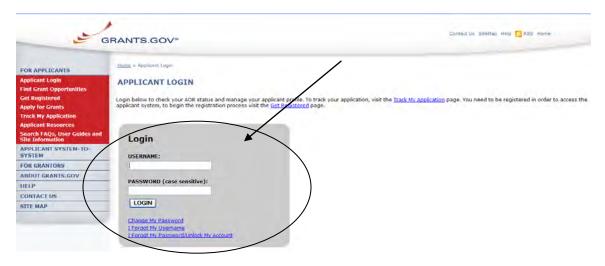
8. Once you have selected the Continue button a confirmation screen will appear, if you have changes you would like to make choose the **Edit** button and the form will return to a screen where you can make changes. If you have no changes select the **Submit** button.



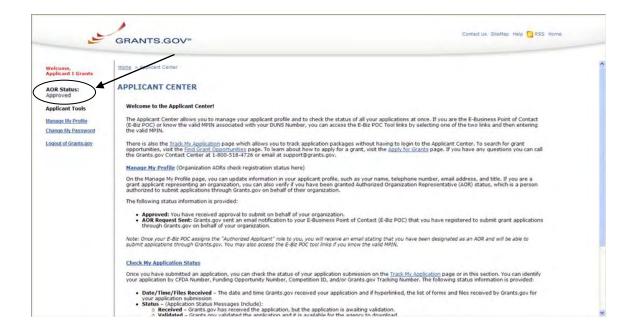
9. You will see a message at the top of the screen that will read "You are successfully registered." To continue to the Applicant login page select the **Continue** button on the bottom right. If you don't receive the successful message, another message will appear stating what issue needs to be addressed with the form. Simply correct the error and select **Submit** until you receive the successful message.



10. After you have created an account with Grants.gov, the E-Business Point of Contact (E-Biz POC) listed on your organization's CCR registration will receive an email notification stating that you have registered; you will also receive a copy of this email. The E-Business Point of Contact will need to log in to the E-Biz POC section of Grants.gov and assign the "Authorized Applicant" role to you. You will be able to log in to see if you have received your authorized status. You can check your AOR status by visiting the Applicant Center, simply log in using the link on the left navigation or in the right quick links throughout the website. In the Applicant Center you can track your AOR status, manage your profile and in the future check your application status.



Once logged into the Applicant Center your AOR status appears in the left navigation as shown below.



You will NOT be able to submit applications until the E-Business Point of Contact has completed the authorization of your Grants.gov profile.

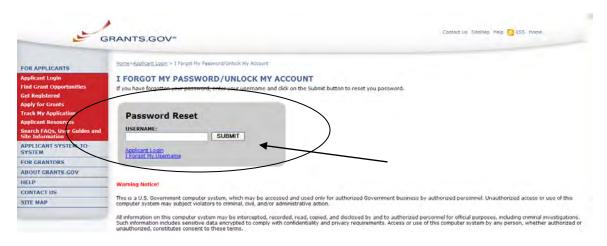
I Forgot My Password/Unlock My Account (Organization)

In the event that you forget your password, you can obtain a new password from the **Applicant Login** page.

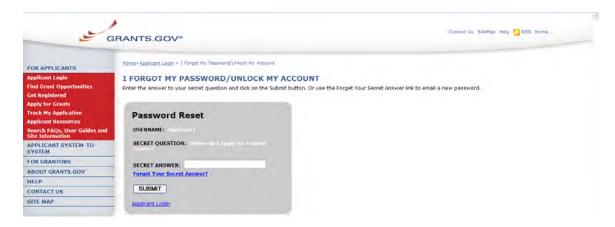
Go to the **Applicant Login** page and select the link **I Forgot My Password/Unlock My Account.**



Then enter your username and select the **Submit** button.



You will be directed to the I Forgot My Password/Unlock My Account page. Simply enter the answer to your secret question and then select the **Submit** button to reset your password.



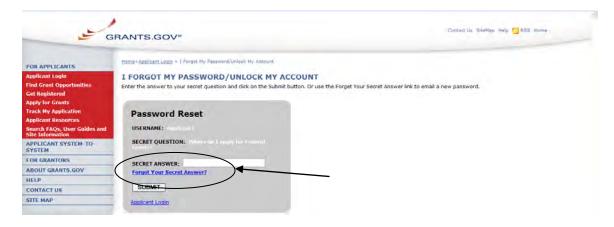
Once your answer is validated you will be directed to enter a new password. Enter a password and then enter it again into the confirm password field and select the **Submit** button.



Once you have reset your password an email is sent to the user notifying of the password change.



Alternatively if you forget the answer to your secret question, you may select the link **Forgot Your Secret Answer?**



To obtain a system-generated password, select the **Email My Password** button. The password will be sent to the email address on file with Grants.gov.



I Forgot My Username (Organization)

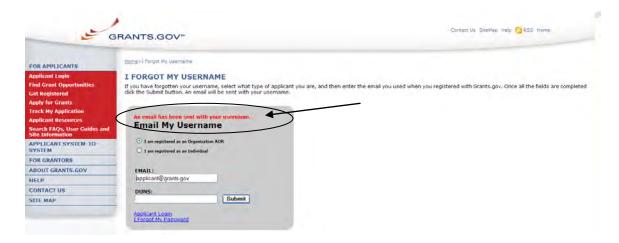
In the event that you forget your username, you can obtain your username from the <u>Applicant Login</u> page. Go to the <u>Applicant Login</u> page and select the link I Forgot My Username.



Please select I am registered as an Organization AOR. Then enter the email and DUNS Number you used when you registered with Grants.gov.



Once you have entered the email and DUNS Number you used when you registered with Grants.gov, simply select the **Submit** button. After selecting **Submit** you will see a message stating "An email has been sent with your username."



If you are an Applicant registered on behalf of an Organization and do not know the email or DUNS Number associated with your Grants.gov registration, you should contact the E-Business Point of Contact (E-Biz POC) for your organization. The E-Biz POC will be able to log in to their account and give you your username. With your username you will be able to follow the instructions for I Forgot My Password/Unlock My Account and will have the ability to reset your password.

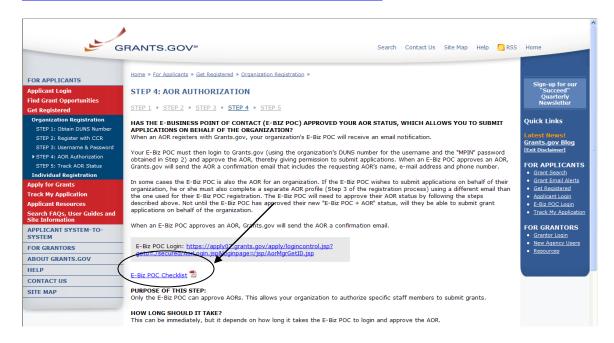
Step 4: AOR Authorization

Prior to submitting grant application packages, representatives of your organization need to register to submit on behalf of your organization. Your organization's E-Business Point of Contact (E-Biz POC), identified during CCR registration must authorize someone to become an Authorized Organization Representative (AOR). This safeguards your organization from individuals who may attempt to submit grant application packages without permission. Only one E-Biz POC is assigned per each of an organization's DUNS (Data Universal Number System) Number. If your organization only has one DUNS Number, then there will be only one E-Biz POC for your organization.

Note: In some organizations, a person may serve as both an E-Biz POC and an AOR, in this case you will need to perform this step and approve yourself as an AOR. If you are the E-Biz POC and want to submit applications on Grants.gov, you will need to register with Grants.gov as an AOR, using an alternate email than the one used in correlation with the E-Biz POC, and authorize yourself as an AOR.

Once an applicant on behalf of an organization registers withGrants.gov, the E-Biz POC will have to approve the request. After the AOR has submitted their request granting permissions to the applicant to become an Authorized Organization Representative (AOR), the E-Biz POC will complete the fourth step in this process as described on this page:

http://www.grants.gov/applicants/org_step5.jsp.



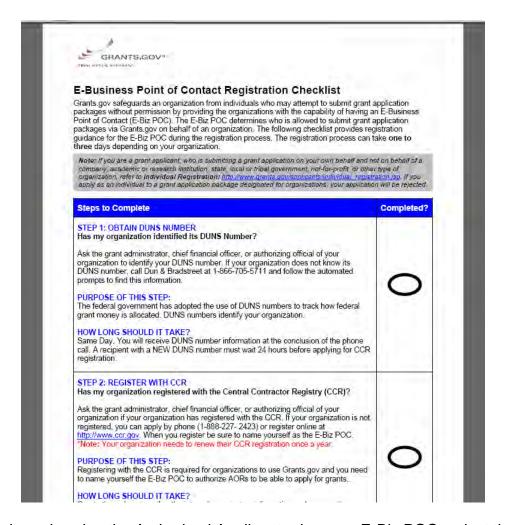
Grants.gov has developed an E-Business Point of Contact (E-Biz POC) Registration checklist to help authorize your organization's AOR (Authorized Organization Representative).

Follow the steps below to review the E-Biz POC Registration Checklist.

- Select Get Registered in the Quick Links on the blue boxed left navigation of any Grants.gov page. This will take you to the Get Registered screen.
- Select Organization Registration from the left navigation.
- 3. Once on the Organization Registration page, select **STEP 4: AOR Authorization** from the navigation.
- 4. Once on the STEP 4: AOR Authorization page, select the <u>E-Business</u>

 Point of Contact Registration Checklist link on the screen.

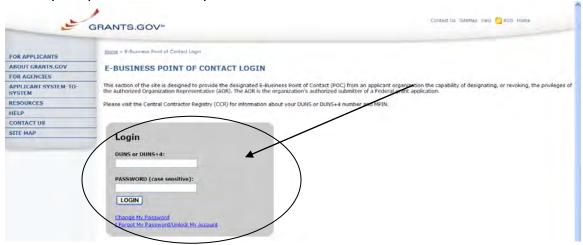
The Registration Checklist is a PDF document, which you may review on-screen or print and retain for future reference.



To login and assign the Authorized Applicant role as an E-Biz POC, select the <u>E-Biz POC Login</u> link in the right navigation menu under Quick Links in the blue box, on most Grants.gov pages.



 On the For E-Business Point of Contact Login screen enter your organization's DUNS Number and Password and select the **Login** button.
 If you are user who has entered your MPIN instead of a Password in the past, enter your MPIN into the Password field and select the **Login** button. You will be prompted to create a password.



- 2. Once you are logged in, select the **Manage Applicants** link on the left of the screen.
- Select the name of the person for whom you want to assign the Authorized Applicant role by selecting the checkbox next to that person's name.
- 4. Select the Reassign Roles button.



- 5. This will take you to the Reassign User Roles screen. Select the Authorized Applicant role in the Remaining Roles box. Select the double arrow pointing toward the Current Roles box.
- 6. To save your changes, select the **Continue** button. Or to cancel your changes, select the **Cancel Reassign** button.

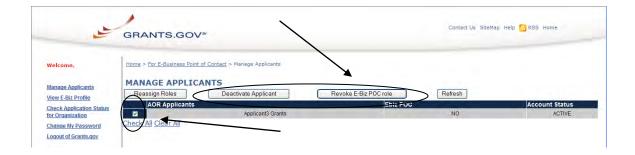


7. Once you have reassigned roles, the applicant is now authorized and can submit applications on Grants.gov.

E-Biz POC Manage Applicants

The E-Biz POC can also deactivate and revoke E-Biz POC roles from AORs as desired. When you revoke E-Biz POC role, you are removing the permissions of an AOR to act as an E-Biz POC.

To deactivate an AOR and/or revoke E-Biz POC role select the checkbox next to that person's name and click the **Deactivate Applicant** button or the **Revoke E-Biz POC role** button.



Select the **Deactivate User** button to deactivate the user. If you do not want to deactivate the user, select the **Cancel** button.



Select the **Remove Ebiz Role** button to deactivate the user. If you do not want to remove the E-Biz role, select the **Cancel** button.



E-Biz POC Change My Password

To change your password, select the **Change My Password** link on the E-Business Point of Contact Login screen or on the right navigation when you are logged in. Enter your DUNS Number, current password, new password and confirm the new password. Remember your password must contain at least eight (8) characters including: at least one (1) uppercase letter (A-Z); at least one (1) lowercase letter (a-z); and at least one (1) number (0-9).



E-Biz POC I Forgot My Password/Unlock My Account

On the E-Business Point of Contact Login screen, select the link I Forgot My Password/Unlock My Account and then enter your DUNS Number. Finally select the Email My Password button. The system will email a new password to the email on file with Grants.gov.



E-Biz POC View Profile

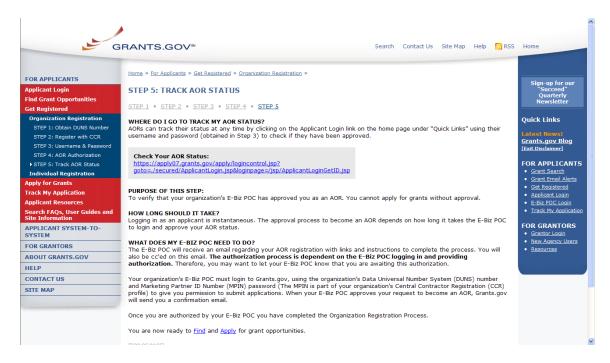
To review and verify the information on file is current, select the **View E-Biz Profile** link in the left navigation. You will be presented with the information on file with CCR. In order to update the information shown within the E-Business Point of Contact (E-Biz POC)/applicant profile, the E-Biz POC must visit the CCR website at http://www.ccr.gov.

Information on file with CCR must be updated annually at CCR.gov to maintain an active Grants.gov registration. Changes may take up to 48 hours to update on the Grants.gov system. If the E-Biz POC changes, to access the E-Biz POC functionality the E-Biz POC will need to enter a valid MPIN.



Step 5: Track AOR Status

Applicants have the ability to log in and check their AOR status by logging in as an applicant. You can learn more on the Step 5: Track AOR Status page.



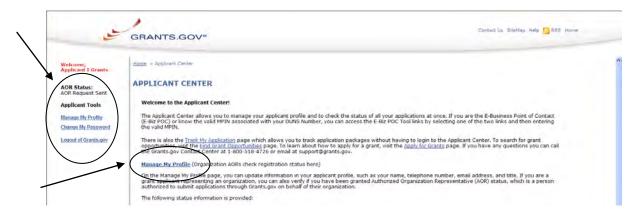
Applicants also have the ability to login and check their AOR status from the home page. To log in as an Applicant select the **Applicant Login** link on the right navigation or in the Quick Links in the right blue navigation bar on the Grants.gov page.



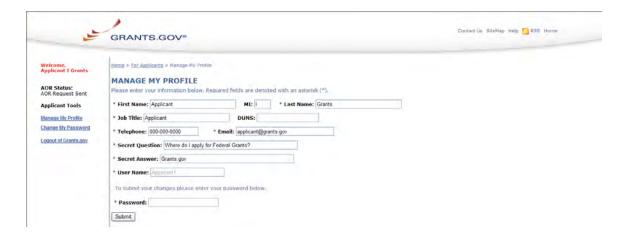
On the Applicant Login page enter your username and password, obtained while registering with Grants.gov. Then select the **Login** button to enter into the Applicant Center.



In the Applicant Center you can check view your AOR status under Manage My Profile from the left navigation. Additionally, select the **Manage My Profile** link on the left navigation menu or select the link on the welcome page.



On the Manage My Profile page, check to be sure the information listed is correct.



Once approved, you will be able to submit applications, check your application status, change your password, manage your profile and if you know the MPIN for your organization, you can utilize the E-Biz POC tools. In the E-Biz POC Tools section, you can manage applicants, view the E-Biz profile and check the application status for your entire organization. Refer to Step 4 for more details about the E-Biz functionality.

