

## Miami-Dade County Department of Cultural Affairs

### Culture Grants Online (CGO) Basics Workshop

#### System Registration Instructions

In order to apply for a Miami-Dade County Department of Cultural Affairs grant using the online CGO grant system, you must first register as a CGO System User. Please follow the steps below to complete the registration:

- Download and install one of the following free internet browsers:
  - Mozilla's Firefox <http://www.mozilla.com/en-US/firefox/personal.html>
  - Google Chrome <http://www.google.com/chrome>
  - Safari <http://www.apple.com/safari/>
- Go to <http://www.miamidadearts.org/> and click on the **Grants** tab, then the **Online Grants** sub-tab to take you to the CGO system.

#### Option 1 - Create a Primary User Account (MASTER) for a New Organization:

- Important: the FIRST account created in the CGO system for an Organization becomes the MASTER account.
- The Primary Account (Master) for the Organization should be created by the top authorizing official for the Organization, such as the Executive Director.
  - 1) Click on the **Sign Up** tab to create a new User Account.

#### **First Page** (User Registration):

- 2) Complete the required fields for the individual's name, address, city, state, zip, phone, email, Username and password.
  - Note: the Username should be generic to the organization (not specific to an individual), such as "ArtsOrgMaster"
  - Make sure to follow the rules for creating a correct password (note: passwords are case sensitive).
- 3) Select **Yes** from the drop-down question at the bottom of the User Registration page to associate this user with an organization.
- 4) Drag the slider at the bottom of the page.
- 5) Click **Submit**. This will bring you to a new page.

**Second Page** (Organization Contact Information):

- 1) At the top of the Organization Contact Information Form, choose **Distributor/Direct Receiver** from the drop-down field.
- 2) Fill in the Organization's FEIN number and legal name.
  - Note: once completed, these fields **cannot** be changed.
- 3) Complete all required fields for the Organization's legal name, address, city, state, zip, phone, fax and website.
- 4) Click **Validate Districts**. This will automatically populate the district codes for the municipality, Commission District, State Senate District, State House District and Congressional District.
- 5) Click **Submit** to save and complete the Organization Registration.

## **OPTION 2 – Create a Secondary User (Non-Primary) Account (Authorized Representative)**

- Once an Organization is registered by the Primary Account User (MASTER), other Users may be affiliated with the established Organization, such as multiple staff members or grant writers.

- **The Primary Account (MASTER) is the only user with the authority to create Secondary User Accounts.**

- 1) Log in to the system using the Primary Account (Master) Username and password.
  - 2) Click the **Manage Account** tab.
  - 3) Click the **Manage Users** tab.
  - 4) Click **Add User**.
  - 5) Create the Secondary User Account (Non-Primary User) by completing all the required fields (First Name, Last Name, Email and User Name).
    - NOTE: The Primary Account User (MASTER) will assign the Secondary User Account (Non-Primary) their Username. It is recommended that the Username be generic to the organization (not specific to an individual), such as "ArtsOrgGrantWriter."
  - 6) Click **SUBMIT**. Upon successful submission, a system-generated email will be sent to the Secondary User Account (Non-Primary). The email will include:
    - A link that the Secondary User Account (Non-Primary) holder MUST click in order to validate the account and create their password; and
    - The Secondary User Account (Non-Primary)'s Username as assigned by the Primary Account User (MASTER).
- ✓ The Primary Account User (MASTER) can RESEND the account activation email to the Secondary User (Non-Primary). This is done by clicking on the envelope action icon on the Primary Account (MASTER)'s *Non-Primary Accounts* table.
- Once a Secondary User Account is created, the Primary Account (MASTER) must assign permissions:
    - 1) Find the Secondary User (Non-Primary) account on the *Non-Primary Accounts* table in the **Manage Account** section of the Primary Account (MASTER).
    - 2) On the far right hand side of the table, click the **Assign Permissions** action icon.
    - 3) Select the desired permissions for the Secondary User Account (Non-Primary). Note: Users with SUBMIT permissions allow that account holder to submit an application on behalf of an applicant organization. Therefore, it is strongly recommended that only the Primary Account User (MASTER) have SUBMIT permissions.

**OPTION 3 – Create a Sponsored Organization Registration Using a Shared FEIN Account  
(Such as University Departments, Municipality Departments and Fiscal Agent Relationships)**

- For assistance in establishing shared FEIN Accounts, please contact your Grant Program Administrator.
- 1) Click on the **Sign Up** tab to create a new User Account.

**First Page** (User Registration):

- 2) Complete the required fields for the individual's name, address, city, state, zip, phone, email, Username and password.
  - Note: the Username should be generic to the Sponsored Organization (not specific to the individual), such as "ArtsOrgMaster"
  - Make sure to follow the rules for creating a correct password (note: passwords are case sensitive).
- 3) Select **Yes** from the drop-down question at the bottom of the User Registration page to associate this user with an organization.
- 4) Drag the slider at the bottom of the page.
- 5) Click **Submit**. This will bring you to a new page.

**Second Page** (Organization Registration):

- 1) On the drop down menu, choose **Indirect Receiver**.
- 2) In the Existing Organizations (Distributor/Direct Receiver) search box, type in the name or FEIN number of the Sponsoring Organization (Parent) and click **Search**.
  - If the Parent Organization is not in the system – STOP. They must first register using Option 1 before you can continue.
- 3) Select the correct Parent Organization name from the list displayed.
- 4) Once the Parent Organization is selected, the FEIN of the Parent will automatically populate.
- 5) Complete the required information for the Sponsored Organization's legal name, address, city, state, zip, phone, fax and website.
- 6) Click **Validate Districts**. This will automatically populate the district codes for the municipality, Commission District, State Senate District, State House District and Congressional District.
- 7) Click **Submit** to save the Organization Registration.
- 8) Read and accept the *Grants Online End User Terms and Conditions* by selecting YES at the bottom of the page.

- Once a Sponsored Organization Account is created, the Parent Organization must accept the Sponsored Organization to be associated with the Parent Organization:
  - 1) The Parent Organization must log in to the system using their Primary Account Username and password.
  - 2) A notice will appear at the top of the account's *My Forms* page that says "There are accounts that need to be approved. Click here to approve them." Click on the link.
  - 3) Find the Sponsored Entity on the Associated Organizations Table. The Primary Account (MASTER) has the option to **Accept** or **Reject** the request by clicking on the appropriate action icon found on the far right hand side of the table.
  - 4) Once a Sponsored Entity is accepted, the Parent Organization can view the Sponsored Entity's contact information by clicking on the View Info. action icon on the far right hand side of the table.