



Requesting EGMS Credentials

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OBJECTIVE

Users will be capable of requesting access to EGMS as a vendor or end user. Users will understand the steps to end-date a user.

This document will review the steps required to access or disallow access to EGMS, including:

- EGMS Vendor setup.
- Credential and permission requests.
- End-dating credentials.

CONTEXT

Organizations interested in applying to District of Columbia State Education Agency (SEA) issued grants will need to register as a vendor or user in the Enterprise Grant Management System (EGMS).

Once an organization is registered as a vendor, individuals must be associated with the organization through credentials and associated permissions. Dependent on the permissions granted, users may make various actions in EGMS.

Often user access may need to change, either gaining more access or ending access to EGMS. If additional permissions are needed they may be requested and granted upon approval. Permissions may be end-dated at any time.

EGMS REGISTRATION

For both New Vendor and New User requests the first few steps are the same.

- In your browser window, type the following:
grants.osse.dc.gov.
- Click on the **New User** link.
- A pop-up will appear requesting the Federal Employee Identification Number (FEIN). The FEIN will be used to pull the vendor information if already registered, or activate New Vendor registration fields.
- Input the FEIN and click **Search**.
 - Please note: if your organization is a local District government agency the FEIN may be #536001131, multiple organizations in the district use this number. If this is your number please contact the help desk [(202) 719-6500 or osse.callcenter@dc.gov] for both New Vendor and New User requests.
 - If the organization is not already registered **New Vendor** fields will appear. See NEW VENDOR section for next steps.
 - If the organization is already registered as a vendor the organization name will show at the top and the **New User** fields will appear. See NEW USER section for next steps.

NEW VENDOR

Upon entering the FEIN and clicking **Search** if the organization is not already registered as a vendor the system will return the following message:

“Unable to find an organization with the provided search criteria. If you would like to request a new organization be added to the GMS, click the request button.”

- Recheck the FEIN to ensure it is correct.
 - If incorrect, input the correct FEIN.
- Click the **Request** button.
 - Additional fields open for the NEW VENDOR REQUEST.
- Click the IRS W-9 link. Complete the form and save to your local computer without using special characters (do not use symbols, only alphanumeric characters) in the document name.
 - Click the **Browse W-9** button.

- Select the appropriate file, click Open.
- Confirm the correct appears to the left of the **Browse W-9** button.
- Click the Master Collection Form (MCF) link. Complete the form and save to your local computer without using special characters (do not use symbols, only alphanumeric characters) in the document name.
 - Click the **Browse MCF** button.
 - Select the appropriate file, click Open.
 - Confirm the correct appears to the left of the **Browse MCF** button.
- Complete the **Organization** fields, ensuring spelling and information is correct.
- Complete the **Individual** fields, this individual should be the primary fiscal representative for the organization.
 - For the **Role** dropdown menu, select “Authorized Rep.” (See information below for role descriptions.)
- Confirm all the information is correct.
- Click the **Submit** button.
- Please note the request may take up to 2 business days to complete. Please plan appropriately.

NEW USER

Actions in EGMS require specific roles. Users will request credentials through the NEW USER REQUEST.

Upon entering the FEIN and clicking **Search** if the organization is already registered as a vendor the system will display the name of the organization return the following message:

“Unable to find any local security admins with the provided search criteria. If you would like to request a new organization be added to the GMS, click the request button.”

- Click the **Request** button.
 - Additional fields open for the NEW USER REQUEST.
- Input:
 - First Name
 - Last Name
 - Email
- Select the role:
 - View Only: users are able to view all data but are unable to make edits or changes.
 - Data Entry: users are able to create applications, reimbursement requests, and may save data. Data Entry users are unable to submit applications or reimbursement requests.
 - Authorized Rep: users have all the functions of the above roles and are able to agree to assurances and submit applications and reimbursement requests. Users must be an employee of the organization and not a third-party vendor.

- Authorized Representative requests should come from leaders at an organization. This person's name should appear on the organization's website. If this is not the case, OSSE will request an email confirmation from a leader in the organization to approve the role.
- Confirm all the information is correct.
- Click the **Submit** button.
- Please note the request may take up to 2 business days to complete. Please plan appropriately.

UPDATING ROLES

User may require changes to roles assigned to credentials. For updates to roles please contact the help desk and request a credential role update.

Help Desk

Phone: (202) 719-6500

Email: osse.callcenter@dc.gov

The help desk require the following information for the ticket:

- User Name:
- User Email:
- Organization Name:
- New Role:

If the request is to upgrade permissions to Authorized Rep, please include a memo or email request from a current Authorized Rep or member of the organization leadership team. Please note the request may take up to 2 business days to complete. Please plan appropriately.

ENDING USER ACCESS

When a user is no longer affiliated with the organization or will no longer be making actions in EGMS organizations will request to end-date the user's access. For end-dating of user credentials please contact the help desk and request a credential role update.

Help Desk

Phone: (202) 719-6500

Email: osse.callcenter@dc.gov

The help desk require the following information for the ticket:

- User Name:
- User Email:
- Organization Name:
- New Role:

FREQUENTLY ASKED QUESTIONS (FAQ)

- How long will it take for my New Vendor request to become active?
 - Please note the request may take up to 2 business days to complete. Please plan appropriately.
- How long will it take for my New User request to become active?
 - Please note the request may take up to 2 business days to complete. Please plan appropriately.
- Why is my attachment/upload not loading?
 - A: please check the naming convention and remove any special characters. The only characters allowed are alphanumeric and the dash (_) or hyphen (-).