

Instructions for Access to Agency Information Registration and RFP Application

This document addresses the following topics:

- 1) How to review/set up your main agency profile after logging in to TGS
- 2) How to retrieve a forgotten password if you have used TGS but can't remember your credentials (pg 5)
- 3) How to register as a new agency if you haven't used TGS previously (pg 9)

You must register your agency, set up user accounts and provide information about your organization prior to accessing the online RFP form. Because some of the information in your agency profile will automatically populate into your proposal, even if you have a user account, you should review and update as needed the Agency Information tab in TGS to ensure records are correct prior to submitting a proposal.

Topic 1

If you have Organization Admin or Data Entry login information (User ID / Password) for your agency:

(note: an Organization Admin is usually an Executive Director or other high level staff member who has full access rights to online Total Grant Solution – TGS.)

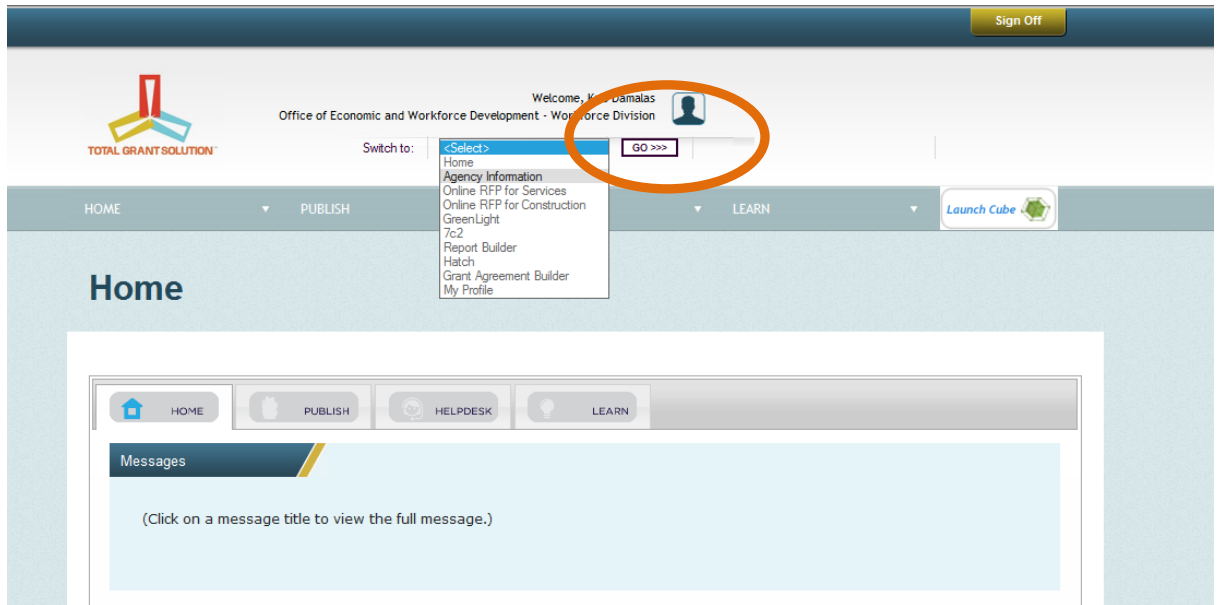
1. Go to <https://totalgrantsolution.org/tgsewd/MasterLogon/>, or visit the RFP website linked through <http://oewd.org/bid-opportunities> and click on the 'Total Grant Solution - TGS' button toward the bottom of the page



2. Enter your Organization Admin or Data Entry level user ID and password and click on the "Sign In" button.



From the home screen, choose Agency Information from the drop down list and click the “Go >>>” button



3. On the next screen, confirm that all the posted Agency Information is correct/up-to-date, then submit the data by clicking the ‘Submit’ button at the top or bottom of the screen

The screenshot shows the 'Agency Info' screen. At the top, there is a 'Sign Off' button. Below it, the user is logged in as 'Welcome, K. Damalas' with a profile icon. A 'Switch to:' dropdown menu is open, showing options: Home, Agency Information, Online RFP for Services, Online RFP for Construction, GreenLight, 7c2, Report Builder, Hatch, Grant Agreement Builder, and My Profile. The 'GO >>>' button next to the dropdown is highlighted with an orange circle. The main navigation bar includes CONTACT, GENERAL, and FINANCIAL. Below this, there is an 'Agency Info' section with a 'submit' button highlighted with an orange circle. The form contains fields for Agency Name, Administrative Address, Federal Tax ID, and Duns Number. There is also a section for uploading an agency image and a 'Mailing Address' section at the bottom.

Please review your Agency Information below and update fields as needed. Once done, click the 'Submit' button to the right or at the bottom of this page to save your data. Fields with an asterisk (*) are required.

Agency Name	Office of Economic and Workforce Dev	(this is the official address on file with the grantor's accounting offices)
Administrative Address	1 South Van Ness Av San Francisco, CA 94131	To update this address, send the new information on your agency's letterhead, signed by the Executive Director, to your Grant Coordinator.
Federal Tax ID *	99-9898989	
Duns Number	00-012-1234	

You can upload an image that represents your agency:

Image To Upload Browse... Upload

Mailing Address

NOTE: updating mailing address does not update administrative address (see above). Administrative address is the official address on file with the grantor's accounting offices and is used for sending financial documents (including checks).

Address Line 1* 1 South Van Ness Avenue # street name street type

4. After clicking the 'Submit' button, a confirmation message regarding saved data will appear at the top of the screen (unless any fields are missing data, in which case, an error message will appear). If you do not see a confirmation message, be sure to check each tab (contact, general, and financial) for the field creating the error.

Remember: When you click 'Submit' on any online Total Grant Solution – TGS application, you are electronically signing the submission. Your electronic signature, which is based on your login information, acts exactly the same as your ink signature on paper documents.

5. Once you successfully submit your agency information, click the drop down list on top of the screen, and then choose "online RFP for Services", then click on the "Go>>>" button.

Sign Off

Office of Economic and Workforce Development - Workforce Division

Welcome, [User Profile]

Switch to: **<Select>**
Home
Agency Information
Online RFP for Services
Online RFP for Construction
GreenLight
7c2
Report Builder
Hatch
Grant Agreement Builder
My Profile

GO >>>

CONTACT GENERAL

Agency Info

Please review your Agency Information below and update fields as needed.
Once done, click the 'Submit' button to the right or at the bottom of this page to save your data.
Fields with an asterisk (*) are required.

Click to save agency info: **submit**

Agency Name	Office of Economic and Workforce Dev	(this is the official address on file with the grantor's accounting offices)
Administrative Address	1 South Van Ness Av San Francisco, CA 94131	To update this address, send the new information on your agency's letterhead, signed by the Executive Director, to your Grant Coordinator.
Federal Tax ID *	99-9898989	
Duns Number	00-012-1234	

Below is a screen shot of the online RFP page once you are successfully logged on and the question set is available in the online system.

TOTAL GRANT SOLUTION™

Switch to: <Select> **GO >>>**

SIGN OFF home criteria **ONLINE RFP**

Welcome, Kris Damalas
Office of Economic and Workforce Development - Workforce Division

All proposals must be submitted by 7:00 PM on Monday, June 23, 2014.

Current Proposals:

- Tech SF - 40245
- Add Back - 40263
- Add Back - 40264
- Add Back - 40267

For security, this page will time out 45 minutes from the time it was accessed.
Once this page times out, you will need to re-login to continue working (any unsaved data will be lost).

Select Program Area

Select and Edit Established Proposal:

- Complete and electronically submit your online proposal by **5:00 p.m., Thursday, January 19, 2017**. The online “submit” button will be disabled promptly at 5:00 p.m., **Thursday, January 19, 2017**. Late applications, including those with saved, but non-submitted data and those that are actively being edited cannot be accepted after the deadline.

Note: Those with Data Entry level access may enter information on the online RFP however only Organization Admin-level users may click the final ‘Submit’ button at the end of the process. If you need to reset your Organization Admin-level user name or password, see below.

Topic 2

If you do not have the Organization Admin or Data Entry login info (User ID / Password) for your agency:

(note: an Organization Admin is usually an Executive Director or other high level staff member who has full access rights to online Total Grant Solution - TGS)

1. Go to <https://totalgrantsolution.org/tgsewd/MasterLogon/>, or visit the RFP website linked through <http://oewd.org/bid-opportunities> and click on the 'Total Grant Solution - TGS' button toward the bottom of the page



2. Click on “register a new agency” below the log on boxes.

A screenshot of the login page. It has a light blue background. At the top, it says 'please sign in' in green. Below that are two input fields: 'user ID' and 'password'. To the right of the 'password' field is a green 'SIGN IN' button. Below the input fields are links for 'user ID help' and 'password help'. At the bottom, there is a red link that says 'Register a new agency', which is circled in orange.

3. Type your agency's name in the “Agency Name” field until you find it in the list

A screenshot of the agency registration confirmation screen. It has a light blue background. At the top, it says 'register your agency' in orange. Below that, it says 'First, please confirm your agency is not already registered in TGS.' Then, it says 'Type your agency name below, and check the list for a match.' Below that is a text input field labeled 'AGENCY NAME:'. At the bottom, there is a question: 'Were you able to find your agency name in the list that appeared above?' with 'YES' and 'NO' buttons. Below that is a 'BACK TO SIGN IN' button.A screenshot of the agency registration list screen. It has a light blue background. At the top, it says 'register your agency' in orange. Below that, it says 'First, please confirm your agency is not already registered in TGS.' Then, it says 'Type your agency name below, and check the list for a match.' Below that is a text input field labeled 'AGENCY NAME:'. Below that is a list of agencies: 'CCSF (50095)', 'CCSF Evans Campus (1885)', 'CCSF John Adams Campus (1750)', 'CCSF Small Business Development Center (2310)', and 'CCSF, Child Development and Family Studies (50853)'. The list is enclosed in a box.

Tip: Since there can be a number of ways to enter an agency name, if you do not find yours on the list at first, try variations. This will help ensure that you do not create a duplicate entry.

For example:

“Vietnamese Community Ctr of SF”

“Vietnamese Community Center of San Francisco”

“SF Vietnamese Community Center”

“SF Vietnamese Comm Ctr”

“San Francisco Vietnamese Comm Ctr”

4. Find your agency’s name by typing the name of your organization in the input box.
If your organization’s name is listed, you will have four options to obtain your account information.

Option 1 – Click “back to sign in” below the agency name box then use the “user ID help” link to retrieve instructions for attaining User ID

Option 2 – Click “back to sign in” below the agency name box then use the Click on the “password help” link to retrieve your password information by email

Option 3 – Call Workforce Development’s main number at 415-701-4848 for assistance.



5. If your organization is listed, then please use the “User ID help” and “password help” links

please sign in

user ID

password

SIGN IN

[user ID help](#) / [password help](#)

Register a new agency

6. If you have your User ID but have forgotten your password, click “password help” then input your user name in the input field and click the “Go” button.

RETRIEVE PASSWORD

To retrieve your password, please enter your User ID into the field below, then click GO>>>. Your password will be sent to the secure email address provided when your User ID was set up.

User ID

GO >>>

[Forget your User ID? \(click here\)](#)

BACK TO SIGN IN

7. You will receive your password via email.
8. If you don't have your User ID and you are not an organization admin, please contact your organization's Total Grant Solution organization admin to provide your user information.
9. If you are an organization admin and do not have your User ID, then, click on the “user ID help” link and follow the directions on the screen.

RETRIEVE USER ID

To retrieve your User ID, please contact one of your agency's Organization Administrator level users or your Grant Coordinator.

If you need the Organization Administrator level sign-in info to be sent to the Org Admins at your agency, [click here](#)

BACK TO SIGN IN

10. An email containing User ID and password information will be sent to ALL users with organization admin level access at your agency.
11. Once the e-mail with login information is received, an Organization Admin at your agency can follow the login procedure under the “***If you have Organization Admin or Data Entry login information (User ID / Password) for your agency***” section of this document

Topic 3

For all other applicants (agencies that never had Total Grant Solution – TGS online accounts):

1. Go to <https://totalgrantsolution.org/tgsewd/MasterLogon/>, or visit the RFP website linked through <http://oewd.org/bid-opportunities> and click on the ‘Total Grant Solution - TGS’ button toward the bottom of the page



2. Confirm your agency is **not** in the system by clicking on “new agency registration” then begin typing your agency’s name in the “Agency Name” field

Tip: Since there can be a number of ways to enter an agency name, if you do not find yours on the list at first, try variations. This will help ensure that you do not create a duplicate entry.

For example:

“Vietnamese Community Ctr of SF”

“Vietnamese Community Center of San Francisco”

“SF Vietnamese Community Center”

“SF Vietnamese Comm Ctr”

“San Francisco Vietnamese Comm Ctr”

A screenshot of a web form titled 'register your agency' in orange script. The text reads: 'First, please confirm your agency is not already registered in TGS. Type your agency name below, and check the list for a match. AGENCY NAME:'. Below this is a text input field. At the bottom, there is a question: 'Were you able to find your agency name in the list that appeared above?' with two orange buttons labeled 'YES' and 'NO'. Below these buttons is a dark blue button labeled 'BACK TO SIGN IN'.

3. If you find your agency’s name in the list, then please follow the directions in the “***If you do not have the Organization Admin or Data Entry login info (User ID / Password) for your agency***” section (above) -- do not continue with the steps in this section; if you do **not** find your agency’s name in the list, then click the ‘No’ button.

4. After clicking the 'No' button, a short version of the online Agency Registration form will appear; complete the form, then click the 'Submit' button at the bottom of the page

If you are acting as a Fiscal Agent for a grantee, please switch to the Fiscal Agent Registration form, by clicking the -- 'Switch to Fiscal Agent Form'-- button near the top of the page

Switch to
Fiscal Agent Form

Register a new Agency

Please enter the information requested below, then click the 'Submit' button at the bottom of this page.
An e-mail will be sent to the Executive Director (using the e-mail address entered on this form in the Executive Director Contact Info section) with login information, as well as further instructions.

Fields with an asterisk (*) are required.

[Switch to Fiscal Agent Form](#) FISCAL AGENTS: Click the button to the left for the correct form.

Agency Information

Agency Name *

Duns Number e.g., 101-100-10000
note: you can obtain a DUNS Number free of charge at <http://fedgov.dnb.com/webform>

Federal Tax ID *

Mailing Address

Address Line 1 * (Select)

Address Line 2

Applicant Information

First Name * Last Name *

Phone # * example: 415-555-5555 Role *

E-Mail * example: execdir@agency.org

Once the above information is complete (remember, items with an asterisk are required), click the 'Submit' button below. An e-mail will be sent to the Executive Director (using the e-mail address entered on this form) with login information, as well as further instructions.

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5. Organization Admin level login information (User ID and password) will be e-mailed to the Executive Director's e-mail address provided on the Agency Information form shortly after the submission (note: depending on system usage, this e-mail can sometimes take up to 24-48 hours to be sent)

6. Once you receive the e-mail with login information, go back to <https://totalgrantsolution.org/tgsewd/MasterLogon/>, or visit the RFP website linked through <http://oewd.org/bid-opportunities> and click on the 'Total Grant Solution - TGS' button toward the bottom of the page



7. Enter the Organization Admin level login information sent by email, then click the 'Sign In' button

A screenshot of the 'please sign in' login form. It has a light blue background. At the top, it says 'please sign in' in green cursive. Below that are two input fields: 'user ID' and 'password'. To the right of the 'password' field is a green 'SIGN IN' button. Below the button are two links: 'user ID help' and 'password help'. At the bottom, there is a red link that says 'Register a new agency' with a small red icon to its left.

8. An extended Agency Information form will appear; complete this form, then click the 'Submit' button at the top or bottom of the screen (note: this form is a more detailed Agency Information form than the initial one mentioned in step #4; please scroll to view/complete all requested information)

Remember: When you click 'Submit' on any online Total Grant Solution - TGS, you are electronically signing the submission. Your electronic signature, which is based on your login information, acts exactly the same as your ink signature on paper documents.

9. Complete and electronically submit your online proposal by **5:00 p.m., Thursday, January 19, 2017**. The online "submit" button will be disabled promptly at 5:00 p.m., Thursday, January 19, 2017. Late applications, including those with saved, but non-submitted data and those that are actively being edited cannot be accepted after the deadline.

Note: Those with Data Entry level access may enter information on the online RFP however only Organization Admin-level users may click the final 'Submit' button at the end of the process.