



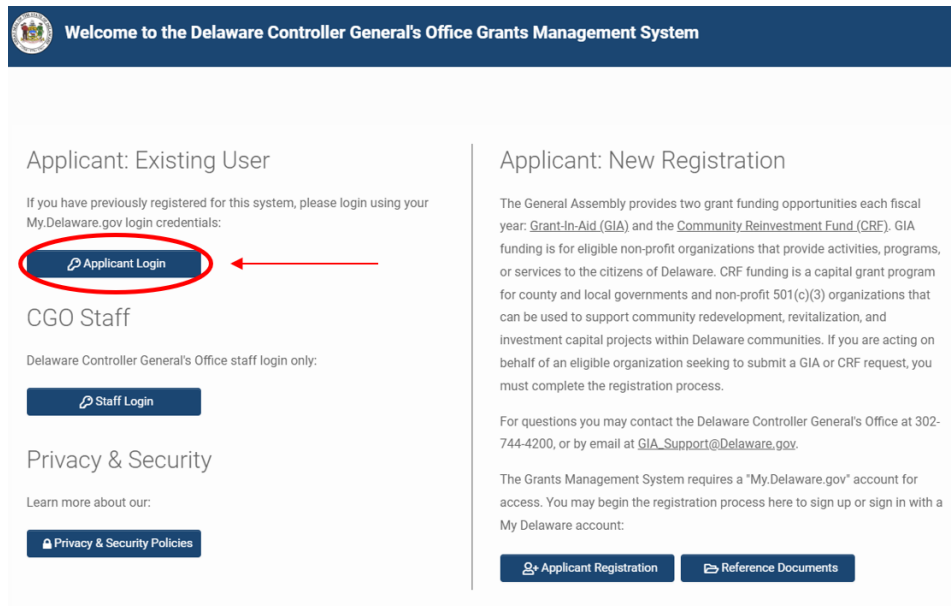
Guide to Add and Invite New Contacts to Register to an Organization



This user guide is for existing organization-registered contacts who wish to invite other users within their organization to be able to register and have access to the Delaware Controller General’s Office (CGO) Grants Management System.

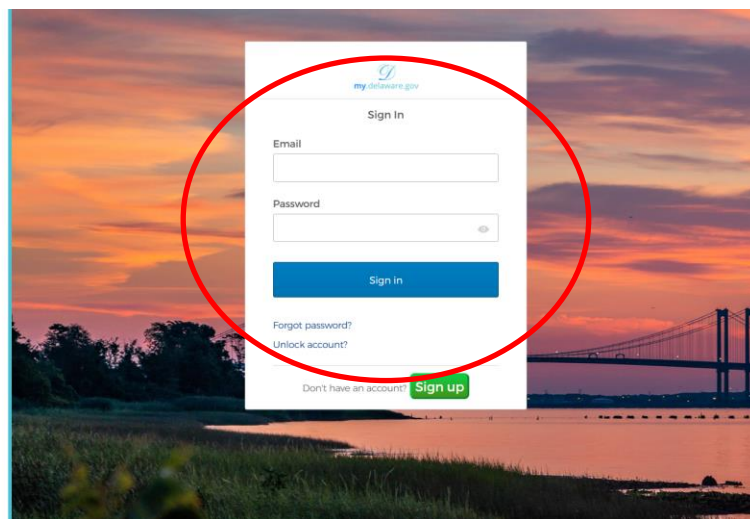
Step 1: Navigate to the Grants Management System landing page at <https://legisgrants.smartsimple.com>.

The Grants Management System requires a “My.Delaware.gov” account for access. To log in, click the blue “Applicant Login” button.

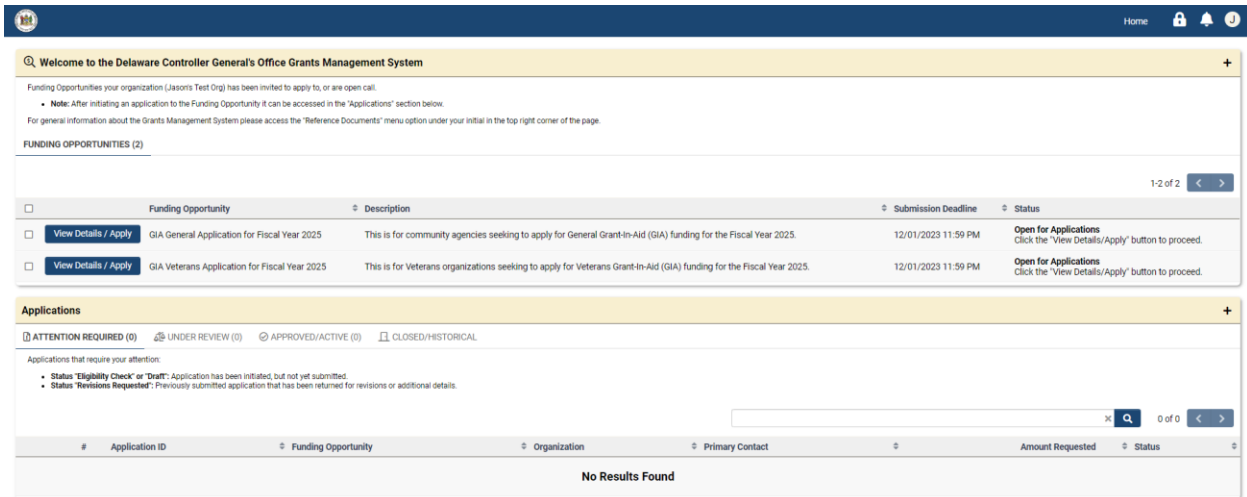


Step 2: Sign in to your My Delaware account, and you will be brought to the Grants Management System home screen.

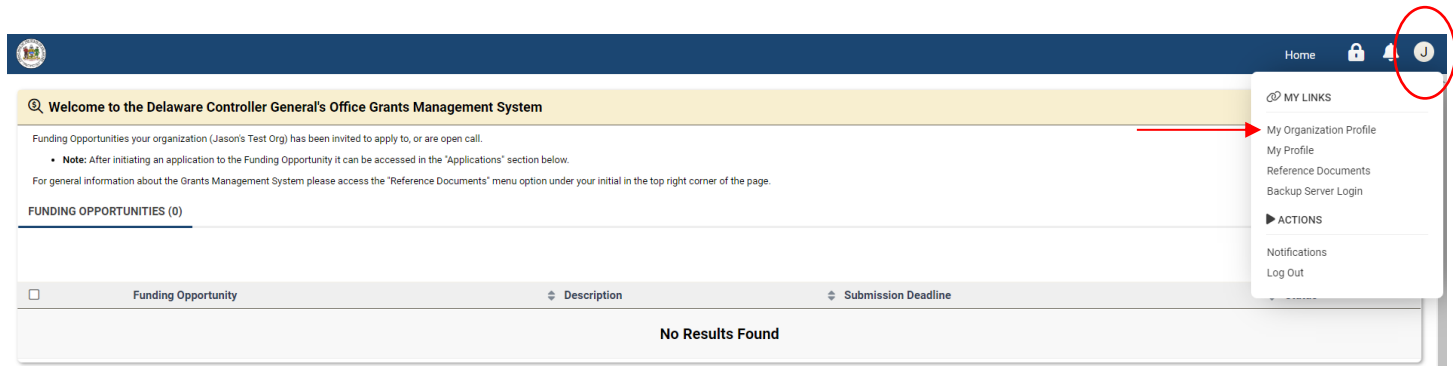
Clicking the blue “Applicant Login” button will bring you to the My Delaware.gov sign in screen.



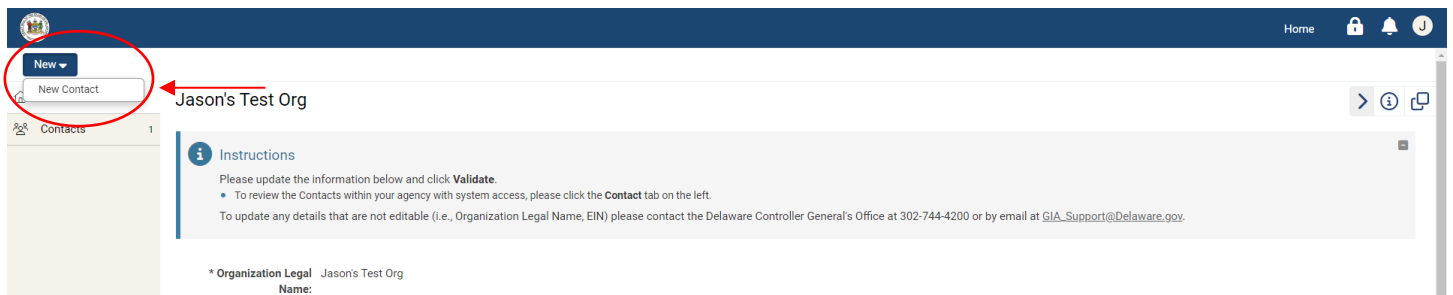
Once you sign in with your My Delaware credentials, you should be automatically signed into the Grants Management System Home screen.



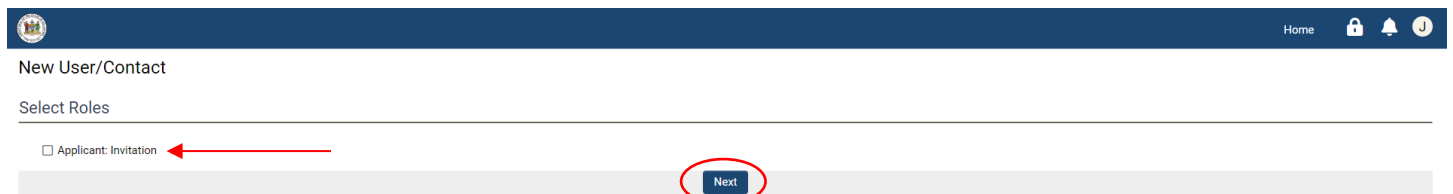
Step 3: Navigate to the “My Organization Profile” menu at the top right corner of the page by clicking the first initial of your name.



Step 4: On the upper left-hand side of the screen, click the blue “New” button, which will open a drop-down menu, and select the “New Contact” option.



Step 5: Select the “Applicant: Invitation” checkbox and click the blue “Next” button.

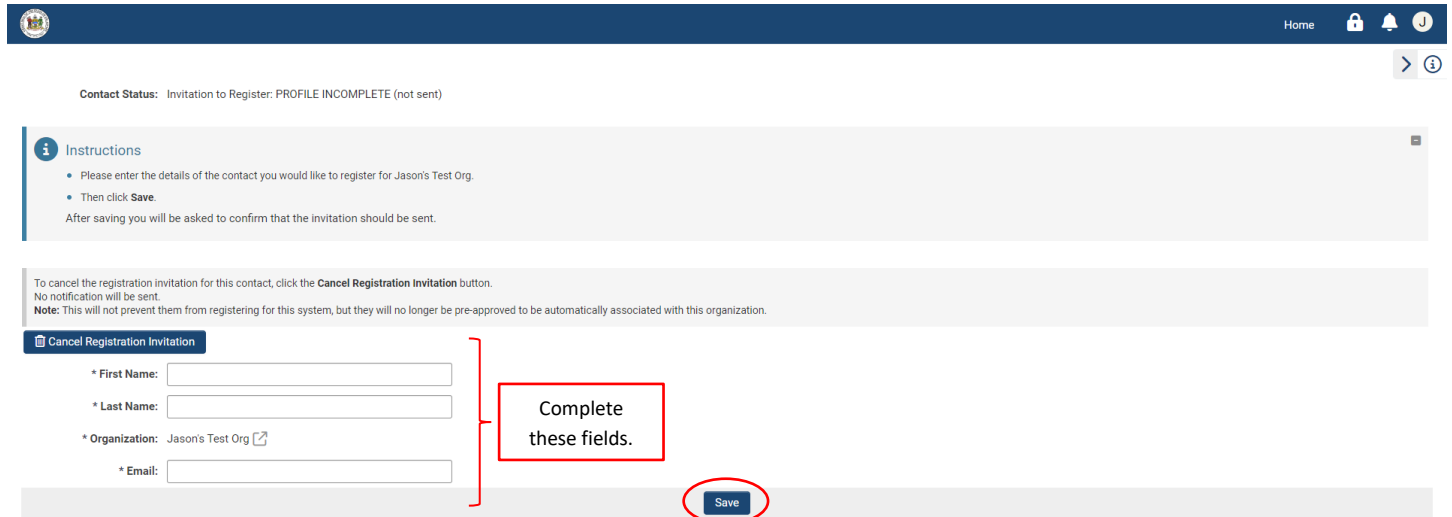


Step 6: Complete the Registration Invitation.

Complete the First Name, Last Name, and Email fields. The email address must match the one they will use to sign in to create a My Delaware account.

If you wish to cancel the registration invitation for this contact, click the blue “Cancel Registration Invitation” button. No notification will be sent.

When completed, click the blue “Save” button.



The screenshot shows a web interface for sending a registration invitation. At the top, the contact status is "Invitation to Register: PROFILE INCOMPLETE (not sent)". Below this is an "Instructions" section with the following steps:

- Please enter the details of the contact you would like to register for Jason's Test Org.
- Then click **Save**.
- After saving you will be asked to confirm that the invitation should be sent.

Below the instructions is a "Cancel Registration Invitation" section with the following text:

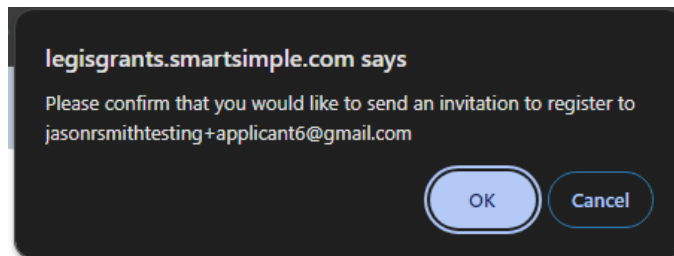
To cancel the registration invitation for this contact, click the **Cancel Registration Invitation** button. No notification will be sent.
Note: This will not prevent them from registering for this system, but they will no longer be pre-approved to be automatically associated with this organization.

The form contains the following fields:

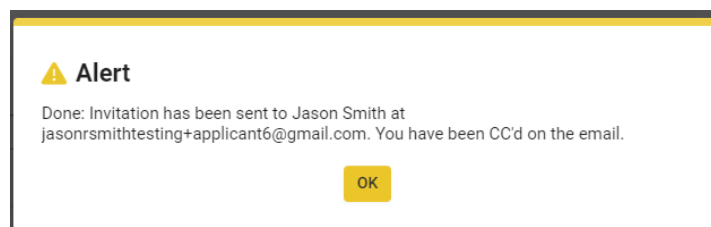
- * First Name:
- * Last Name:
- * Organization: Jason's Test Org
- * Email:

A red box highlights the "First Name" and "Last Name" fields with the text "Complete these fields." A red circle highlights the "Save" button.

A pop-up notification will appear confirming the email address you'd like to send an invitation to register. If it's correct, click “OK.” If it's not correct, click “Cancel.” Then, make your changes and click the blue “Save” button again to resubmit.



After clicking “OK,” an alert will appear confirming that the invitation has been sent and to what email address. The person sending the invitation will also receive a copy of the invitation email.



Reviewing the “Contacts” tab will also confirm that the Invitation to Register has been sent.

Jason's Test Org

Instructions

Please review the list of contacts below to ensure all details are correct. In particular the 'Contact Status':

- **Active:** These contacts have full access on behalf of this organization.
- **No Access:** These contacts been disabled and can no longer access the system. (Typically former employees).
- **Provisional: Approval Pending:** These contacts have limited access on behalf of this organization. Please click into the contact and approve or decline their registration.
- **Invitation to Register:** These contacts have been invited to register for this organization, but have not yet done so. To invite other contacts within your organization to register, click **New > Contact**. Be sure to select the 'Applicant: invitation' checkbox on the screen that follows.

#	First Name	Last Name	Title	Email	Phone	Contact Status
1	Jason	Smith		jasonsmithtesting+applicant6@gmail.com		Invitation to Register: Sent
2	Jason	Smith	Chief Tester in Charge	jsmith.cgo.demo@gmail.com	302-744-4206	Active

If the individual who invited the user to register wishes to cancel their invitation at any time, you can click on the blue “Open” button next to the individual you wish to cancel.

Jason Smith

Contact Status: Invitation to Register: Sent

Invitation to Register Sent

An invitation to register has already been sent to this contact at 'jasonsmithtesting+applicant6@gmail.com'.

- If they wish to register under a different email address, update the email address and click **Save**.
- You will then be asked to confirm that an updated invitation email should be sent.

To cancel the registration invitation for this contact, click the **Cancel Registration Invitation** button. No notification will be sent.

Note: This will not prevent them from registering for this system, but they will no longer be pre-approved to be automatically associated with this organization.

Cancel Registration Invitation

* First Name: Jason

* Last Name: Smith

* Organization: Jason's Test Org

* Email: jasonsmithtesting+applicant6@gmail.com

Save

Then click the blue “Cancel Registration Invitation” button. The system will ask you to confirm that you wish to cancel the registration invitation.

legisgrants.smartsimple.com says

Are you sure you want to cancel the registration invitation for Jason Smith (jasonsmithtesting+applicant6@gmail.com)?

OK Cancel

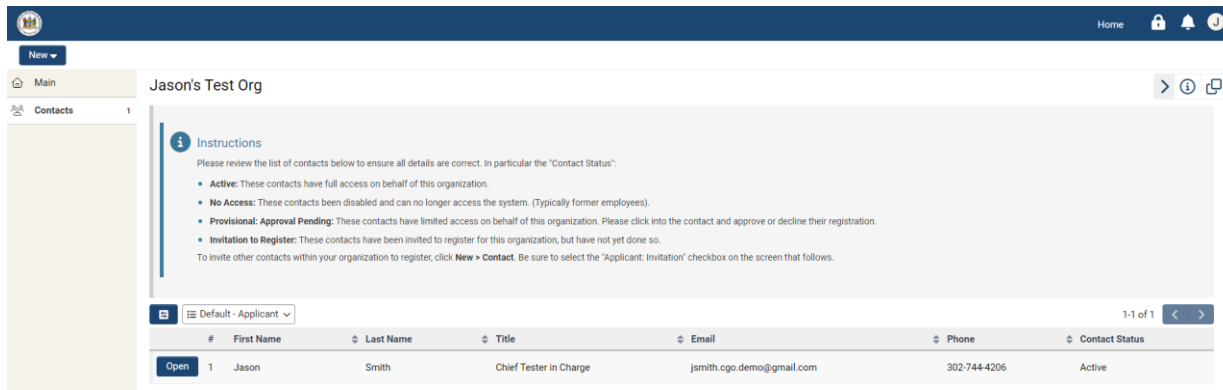
Clicking “OK” will confirm that the invitation has been canceled.

Alert

Complete: Invitation to jasonsmithtesting+applicant6@gmail.com has been cancelled.

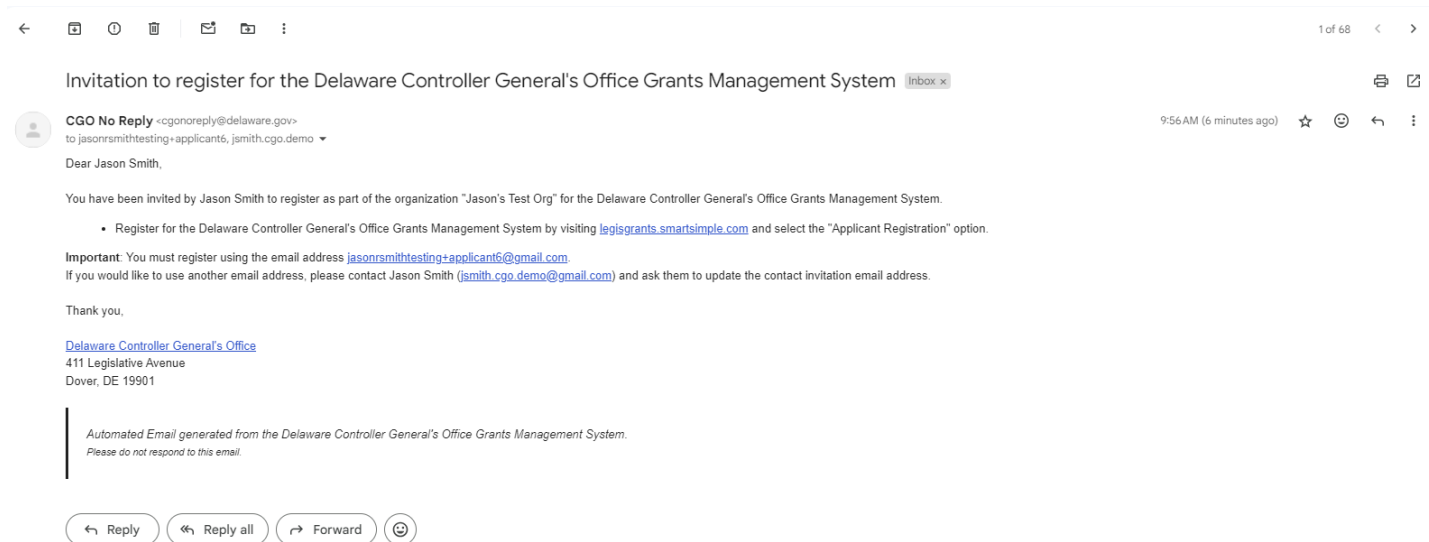
OK

The invited contact will no longer appear on the Contacts tab.



Step 7: The individual invited by your organization or CGO Staff will receive an Invitation to Register by email like the one below.

Once they receive the email, they can register using the link in the email and review the **“Guide to Complete Invited New Contact Registration to an Organization”** available on our websites for help completing that process if necessary.



Once registration is completed, the contact should have full access to create applications on behalf of the organization. The contact can also be added as a collaborator on existing applications, including editing and submitting.

Important: Any invited contacts must be added as collaborators to applications if they wish to view or edit them. Contacts can only see all past or current applications if they are added by the contact who started the application or CGO Staff.

If you need assistance adding a collaborator, send your request to **GIA_Support@Delaware.gov**.