ONLINE REGISTRATION FOR CDF APPLICANTS

TO:	**Cultural Development Fund Applicants**
FROM:	**NYC Department of Cultural Affairs**
RE:	**Online Registration**

Each organization seeking support from the Cultural Development Fund must register users and create an online Account Profile; the agency will use this profile throughout the year to contact your organization and will send critical information about funding opportunities and required documents, including applications and final reports if funded, to the registered users. In addition, only registered users are able access the Cultural Development Fund Online Application. **It is therefore critical that all organizations keep their Account Profile and registration information current at all times.**

This instructions document provides step-by-step guidelines for registration and enrollment. For organizations already enrolled, these instructions also include information about changing an organization's Primary User and editing the list of approved Delegate Users (see page 5).

The **Primary User** should be the person at your organization who is responsible for managing your interaction with the Department of Cultural Affairs; this may be the Executive Director or it may be a different staff member. The Primary User and the Executive Director will be the main contacts for agency updates and correspondence. In addition to having the ability to access an organization's online application(s), this user will also have the ability to invite up to four Delegate Users from the organization who will have access to view, create, edit and/or submit online documents. Only the Primary User, however, has the ability to invite or remove Delegate Users.

Before an organization is able to access the Online Application the Primary User must register his or her email address and complete enrollment. Each user must register his or her email address and verify it before s/he can log in. It is important to remember that an email address cannot be affiliated with more than one organization; we recommend that you use an email address supported by your organization's domain name. If you use a personal email address to register, it can be affiliated with only one organization.

The steps for registration and enrollment are as follows:

- The Primary User at an organization registers his or her email address and logs in. The first user at an organization to log in becomes the Primary User. This designation may be changed later.
- The Primary User enrolls the organization and
    - Enters the organization details,
    - Enters his or her DCA Primary User information,
    - Identifies and invites Delegate Users (making sure to remind them to activate their accounts),
    - Completes Enrollment for the organization.
- Each Delegate User receives a confirmation email and must log in to activate his/her DCA user account.

The Primary User is responsible for the ongoing management of the Account Profile, including adding and removing delegates and assigning the Primary User designation to another user if necessary.

These instructions provide detailed guidance for the registration and enrollment process. On the left side of each page you will find images from each section to help you navigate online registration and enrollment. If you have questions or technical difficulties, please call the Programs Unit at (212) 513-9381.

INSTRUCTIONS INDEX

WHAT YOU WILL SEE

REGISTERING YOUR ORGANIZATION FOR THE FIRST TIME

If your organization has not applied to the Cultural Development Fund previously, you will need to register a Primary User and enroll your organization. If you have applied to DCA in the past few years and are having trouble accessing your online profile, please call your Program Officer or (212) 513-9381 for assistance.

SELECTING AND REGISTERING YOUR ORGANIZATION'S PRIMARY USER

Select an individual in your organization to serve as the Primary User. Only one Primary User account is available per organization. The first user from an organization that signs up for an account will automatically become the Primary User. This user can later designate any active Delegate User associated with the organization as the Primary User.

LOGGING IN

To begin registration, go to the "About CDF/ Registration" tab of the DCA Programs website (www.nyc.gov/culture), and click Register for an Account. Once at the "Welcome to Your Cultural Affairs Account" page, click Register New Account.

ENTERING YOUR EMAIL ADDRESS AND CREATING A PASSWORD

On the "Register New Account" page, enter your email address and the letters displayed and hit Submit. Once the email address is submitted, you will create a password that is unique to the email address and agree to the Terms of Use. The password must be at least eight characters and must contain at least one number or symbol. Click Submit after the password has been created. The password can be changed, or retrieved if forgotten (see page 3 of these instructions).

ACTIVATION EMAIL

An email will be sent to the address entered. Open the Activation Email, and click the link in the body of the email. You must click the link in the email to verify your account before proceeding. For security reasons, confirmation emails expire after 72 hours. If you have not received your Activation Email within two hours, check your junk mail.

WHAT YOU WILL SEE

Welcome to Your Cultural Affairs Account

Your account has been verified.
To continue with the registration process, please log in with your email address and password below.

Log in to your Cultural Affairs Account below using your email address and password. Through this account, you can access online forms of the NYC Department of Cultural Affairs, including:

- Cultural Development Fund Grant Application(s)
- Cultural Development Fund Grant Renewal(s)

Is this your first time logging in? Click Register New Account to start creating a profile for you and your organization. Note: If your organization is already registered and you would like to access its online forms, you must be invited by its Primary User.

Application Log In:

Email Address: [　　　　　]
Password: [　　　　　]

ACCOUNT LOG IN

Register New Account | Forgot/Change Password

Organizational Affiliation

Enter the Organization ID of your organization in the space provided below. The Organization ID is the Federal Employee Identification Number (EIN) that was assigned to your organization when it was incorporated. The nine-digit number should be identical to the number on your NYS Incorporation or IRS 501(c)(3) determination letter. The number must be entered in the format XX-XXXXXXX.

Note: If your organization applies through a tax-exempt fiscal sponsor (known as a conduit organization) enter the EIN of YOUR organization, NOT the EIN of your fiscal sponsor (the conduit).

(?) Organization ID (EIN): [　　　　　]

SUBMIT   CANCEL

Organization Confirmation

Sorry, the Federal Employee Identification Number you entered was not recognized by our database.

Has your organization applied for Department of Cultural Affairs Programs funding (Cultural Development Fund) in the past four years?

NO, CONTINUE WITH REGISTRATION

If your organization has submitted an application to the Department of Cultural Affairs in the past four years, check the organization's EIN for accuracy and resubmit, if incorrect. If the corrected EIN is still not recognized, or you are not sure whether you have applied in the past four years, please contact your Program Specialist directly, or call 212-513-9346 to receive assistance with your registration.

RETURN TO LOGIN

Organization ID (EIN): 19-0000012

Complete Your Registration

To finish registering, enter the information requested. As the Primary User of your organization, you have the ability to invite "Delegate" users who can also access the organization's online applications.

Once you click "Register", you will receive an email confirming that your account has been registered, and individuals you enter as Delegate users will receive an email inviting them to create an account.

Organization Information:

Please enter the correct legal name and, if applicable, an "Also Known As" (AKA) for your organization. Do not enter acronyms or abbreviations.

(?) Organization Name: [　　　　　]
(?) AKA: [　　　　　]

Primary User Information:

Please enter or confirm your contact information below. This information will be used for correspondence related to your organization so be sure it is accurate. Once your account is registered, you can edit this information.

Salutation: - Select -
First Name: [　　　　　]
Last Name: [　　　　　]
Middle Initial: [　]
Suffix: - Select -
Job Title: [　　　　　]
Work Telephone: [　][　][　]   Ext. [　]
Fax Number: [　][　][　]

LOGGING IN FOR THE FIRST TIME

The link in your Activation Email will direct you to the Welcome screen, which will display a message indicating that the account has been verified. Enter the email address you have registered and the password you created and click Account Log In.

ORGANIZATIONAL AFFILIATION

Enter your organization's Federal Tax ID number (EIN). It is very important to enter this number correctly; please verify the number before you click Submit. If your organization has applied to DCA at anytime since FY09, you will receive a message indicating that your organization is already in our system. In this case please call the Programs Unit at (212) 513-9381.

ORGANIZATION CONFIRMATION

Any applicant whose Tax ID number (EIN) is not recognized will be asked to confirm that the organization is not a previous applicant to DCA. New applicants should click No, Continue with Registration. Previous applicants should call the Programs Unit at (212) 513-9381 if their organization is not recognized.

COMPLETING YOUR REGISTRATION

Fill out the Organization's name and AKA, then fill out the Primary User's contact information. Remember that this information will be used by DCA to contact your organization and that it is critical that it is current at all times. You must hit Register in order to complete the registration process. Once your Registration is complete you may access the Application and Final Report. Instructions for the Application are available on the Programs Funding page under the "Applying" tab.

IF YOU FORGET YOUR PASSWORD

If you have forgotten your password or wish to change your password, click on the Forgot/Change Password link on the Welcome screen. Enter your email address on the "Send New Activation Email" page and submit. Close the window and, when the email arrives, click the link in the body of the email. The "Change Password" page will appear and allow you to change your password.

IF YOUR ACTIVATION EMAIL EXPIRES

The link in your Activation Email will expire if you do not complete registration within 72 hours. If your email is expired the "Send New Activation Email" page will appear when you click the link. Enter your email address and submit; a new Activation Email will be sent.

WHAT YOU WILL SEE

WHAT DELEGATES WILL SEE

SELECTING AND REGISTERING YOUR ORGANIZATION'S DELEGATE USER(S)

A Delegate User must be invited by the Primary User to register for an online account; each organization should have at least one Delegate User in addition to the Primary User, and may have up to four. Once activated, Delegate Users have the ability to view, create, edit and/or submit applications. As is the case with Primary Users, an email address for a Delegate User can only be registered to one organization. After being invited, each Delegate User must follow the link in the Activation Email to verify his or her email address.

ACCOUNT REGISTRATION FOR DELEGATES

The Primary User will enter the email address, first and last name of each Delegate User s/he would like to invite. Each Delegate will receive an email inviting them to register their email address. The Delegates will receive their Activation Emails only when the Primary User has clicked the Register button. Delegate User registration is similar to Primary User registration.

CREATING DELEGATE PASSWORDS

The Invitation Email will direct each Delegate to the Welcome screen where they will click Register New Account. The Delegate will enter his or her email address and the letters displayed and hit Submit. Once the email address is submitted, the Delegate will create a password that is unique to that email address, agree to the terms of service, and click Submit. The password must be at least eight characters and must contain at least one number or symbol.

ACTIVATION EMAIL

An Activation Email will be sent to the address entered. The Delegate must go to his or her email account, open the Activation Email, and click the link. For security reasons, **Activation Emails expire after 72 hours**. If the email is not received within two hours, the user should check his or her junk mail. The Delegate must click the link in the email to verify the account before proceeding. Until the account has been verified, the status of the Delegate User will remain as Pending on the "Account Profile" page, and the Delegate User will be unable to access the site.

COMPLETING REGISTRATION

After logging in, the Delegate will complete his or her contact information. As with the Primary User, this information will be used by DCA to contact your organization and it is critical that it be current at all times. Once the Delegate's Registration is complete, he or she may log into the Application or Final Report. Instructions for the Application are available in the Programs Funding area of www.nyc.gov/culture.

WHAT YOU WILL SEE

Cultural Affairs Account

WELCOME TO YOUR NYC DEPARTMENT OF CULTURAL AFFAIRS ONLINE ACCOUNT

Use this page to create or edit current Cultural Development Fund applications and access submitted applications. Be sure to keep your Cultural Affairs account up-to-date by editing your Account Profile below. Always contact your Program Specialist directly to notify the agency of significant administrative changes.

[ACCOUNT PROFILE] [NEW APPLICATION]

Account Profile

Primary User Information:

Salutation: Ms.
First Name: Test
Last Name: Test
Middle Initial:
Suffix: - Select -
Job Title: Admin Asst
Work Telephone: 123 456 7890 Ext.
Fax Number:

User Information:

As the Primary User, you can invite individuals to register as new Delegate users, remove existing Delegate users, and change the Primary User. Remember: Delegate users will also have the ability to create, edit, or submit application information. All registered Delegate users will receive correspondence from the Department of Cultural Affairs.

- To invite a new Delegate user, enter their name and email address below; the address entered will be sent an email invitation to register once you click "Save."
- To remove an existing Delegate user, click "Remove" next to that Delegate user's information.
- To change the Primary User, click the "Change" link next to your name. A new window will open from which you can select a registered Delegate user to be the new Primary User.

Invitations, removals and changes will not be saved or submitted until you click "Save". All Delegate users will receive email notifications of any changes made to their accounts.

Email Address	Name	Account Type	Status	
test@mailinator.com	test@mailinator.com	Primary	Active	Change
test@mailinator.com	test@mailinator.com	Delegate	Active	Remove

Email Address:
First Name:
Last Name:

[Add User] [Clear Fields]

[SAVE] [CANCEL]

Warning - Remove Account
Are you sure you want to remove this user?

[YES] [NO]

Change Primary User
Select new Primary User: - Select -

[SAVE] [CANCEL]

MAKING CHANGES TO YOUR REGISTRATION INFORMATION

It is critical that your Organization maintain up-to-date contact information in the Account Profile throughout the year. Your organization should update this section whenever you have changes to any user(s), including removal of users or change in Primary User. You may access the Account Profile at any time, even if the Application or Final Report is not currently available. We will use the contact information in your Account Profile to reach your organization throughout the year.

EDITING YOUR INFORMATION

Each user can edit his or her salutation, name, job title, phone and fax numbers. However, the email address cannot be changed as it is the username for that account. If you have a staff change, the new staff member must register his or her unique email address. **Do not** simply replace the former staff member's name without also registering the new staff member's email address.

CHANGING YOUR ORGANIZATION'S PRIMARY USER

It is particularly important that your organization keep the Primary User contact information up to date. The Primary User is the only person in an organization who can add or delete users. The current Primary User can reassign the Primary designation by going into the Account Profile and clicking "Change" in the User Information. A new Primary User can be selected from the drop-down menu of active Delegate Users. If there are no active Delegates, then the "Change" button will not appear and you must either invite a new user or activate a pending Delegate. If it has been over 72 hours since the pending Delegate was invited, then the link in the Activation email is expired and the Delegate User must be removed and re-invited. In the event that you no longer have access to the Primary User's account, please contact your Program Officer or (212) 513-9381.

ADDING DELEGATE USERS AFTER ENROLLMENT

The Primary User may add Delegate Users at any time after enrollment has been completed. The Primary User will need to log in to the Account Profile and add the email address, first and last name of the user. The Delegate User must then complete the registration process as described on page 4 of these instructions.

REMOVING DELEGATE USERS AFTER ENROLLMENT

The Primary User may remove Delegate Users any time after enrollment has been completed by logging in to the Account Profile and clicking Remove next to the user's information.