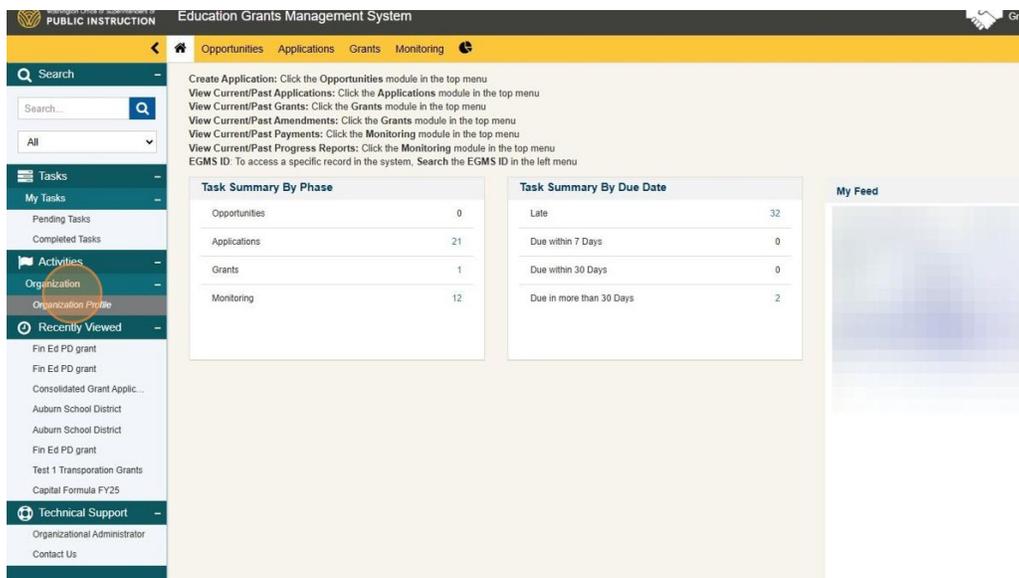


# How to add a new user to your Organization Profile within the Education Grants Management System (EGMS)

**This guide shows organization administrators how to add a new user to their profile. If you are trying to associate an existing user with a record, please follow the [How to Associate Users](#) guide.**

1. Once you have logged in as the Organization Admin, click "Organization Profile" on the left navigation panel.



2. Scroll down to the All Contacts table and click the blue "New" button on the right.



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Total Records: 2

All Contacts New

1. Add Program of Interest: Click the **View** action on your Contact to **Associate** the Program of Interest. (The admin can add Program of Interest for all Contacts)
2. Organization Administrator: The Is Administrator column indicates the Organization Administrators. There can be up to 2 organization administrators at a time. The administrator can be changed by current organization administrators or OSPI through the action within Contacts table.
3. For more information or inquiries about licenses please contact [egms.support@k12.wa.us](mailto:egms.support@k12.wa.us)

Search...

Showing 1 to 10 of 30 records \* Records are sorted by Created Date descending order Page 1 of 3

Full Name	Role	Is Administrator	Email	Phone	School	Status	Is User	Username
Auburn Admin	Primary	<input checked="" type="checkbox"/>				Active	<input checked="" type="checkbox"/>	
	Primary	<input checked="" type="checkbox"/>				Active	<input checked="" type="checkbox"/>	
	Secondary	<input checked="" type="checkbox"/>				New	<input checked="" type="checkbox"/>	
	Primary	<input checked="" type="checkbox"/>				New	<input checked="" type="checkbox"/>	
	Primary	<input checked="" type="checkbox"/>				New	<input checked="" type="checkbox"/>	
	Secondary	<input checked="" type="checkbox"/>				New	<input checked="" type="checkbox"/>	
	Primary	<input checked="" type="checkbox"/>				New	<input checked="" type="checkbox"/>	
	Secondary	<input checked="" type="checkbox"/>				New	<input checked="" type="checkbox"/>	
	Secondary	<input checked="" type="checkbox"/>				New	<input checked="" type="checkbox"/>	
	Secondary	<input checked="" type="checkbox"/>				New	<input checked="" type="checkbox"/>	

3. Add details to each required field (those with the asterisk).

New Contact

Save

\* Required to Save \* Required to Submit

Information

Organization: Auburn School District

Prefix: --None--

\*First Name:

\*Last Name:

\*Phone:

Mobile Phone:

\*Email:

\*Role: --None--

Contact Type: --None--

School User Only (Optional):

Address Information

Address Line 1:

Address Line 2:

City:

State: --None--

Zip Code:

Save

4. Under "Role," select the role type. Please note, only Primary users can submit records to OSPI.



Project Location 915 4TH ST NE AUBURN WA 98002

Primary Address 915 4TH ST NE AUBURN WA 98002

Total Records: 2

**All Contacts**

1. **Add Program of Interest.** Click the **View** action on your **Contact** to **Associate the Program of Interest.** (The admin can add Program of Interest for all Contacts)
2. **Organization Administrator.** The **Is Administrator** column indicates the Organization Administrators. There can be up to 2 organization administrators at a time. The administrator can be changed by current organization administrators or OSPI through the action within Contacts table.
3. For more information or inquiries about licenses please contact [egms.support@k12.wa.us](mailto:egms.support@k12.wa.us)

Search...

\* Records are sorted by **Created Date descending order**

Showing 1 to 10 of 31 records

Full Name	Administrator	Email	Phone	School	Status	Is User	Username	Actions
Test Test II		test@testguy.com	123456789		New	✗		[View] [Edit] [Delete]
					Active	✓		[View] [Edit] [Delete]
					Active	✓		[View] [Edit] [Delete]
					New	✗		[View] [Edit] [Delete]
					New	✗		[View] [Edit] [Delete]
					New	✗		[View] [Edit] [Delete]
					New	✗		[View] [Edit] [Delete]
					New	✗		[View] [Edit] [Delete]
					New	✗		[View] [Edit] [Delete]
					New	✗		[View] [Edit] [Delete]

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7. You can customize the invitation email text if you would like.

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**Upload Application Budget**

**Instructions:**  
Click the "Choose File" button to select the Excel (.xlsx or .xls) file on your computer from which you wish to upload data. Once you select the file, please click the "Upload File" button to begin uploading the data.

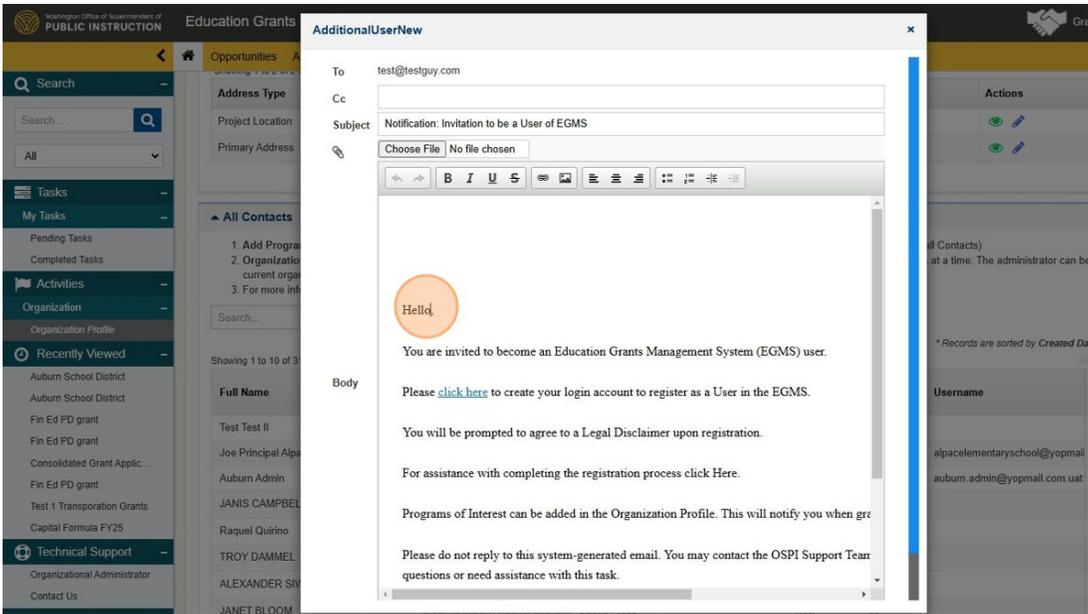
Choose File No file chosen

Upload File

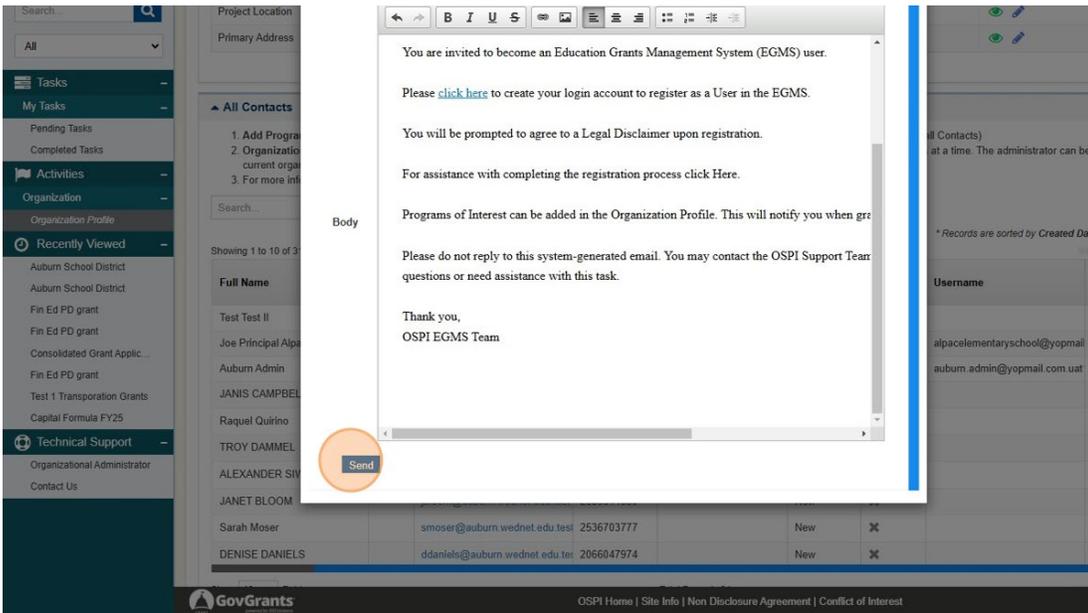
Focus Area : 204 Test

27 Teaching	\$0.00	\$0.00	\$95.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$95.00
Total - Focus Area : 204 Test	\$0.00	\$0.00	\$95.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$95.00
Grand Total	\$0.00	\$0.00	\$95.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$95.00

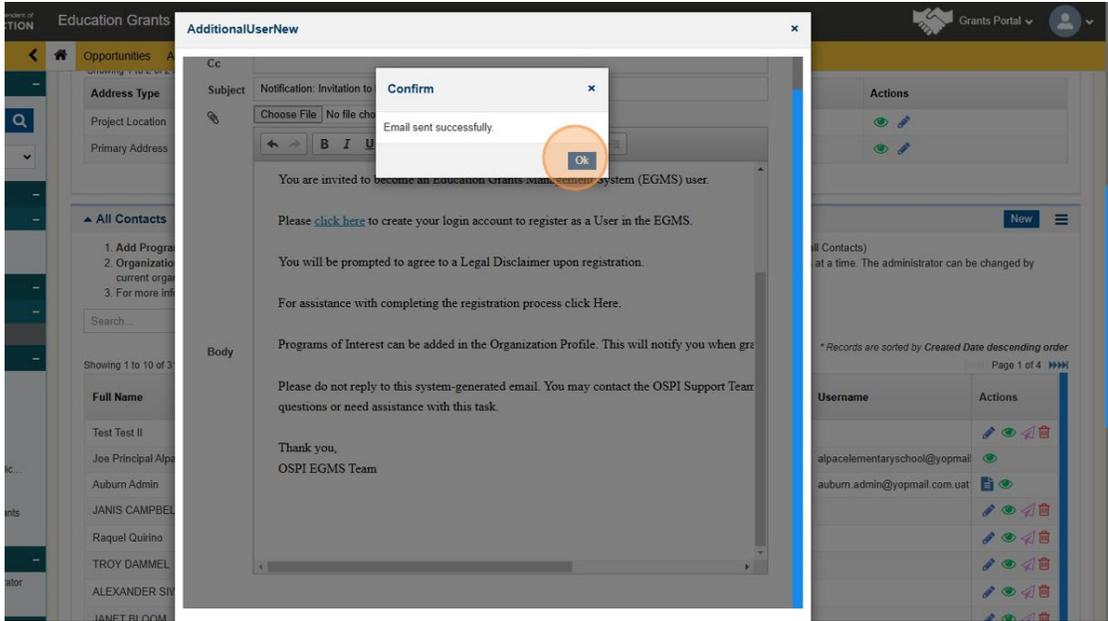
Total Records: 1



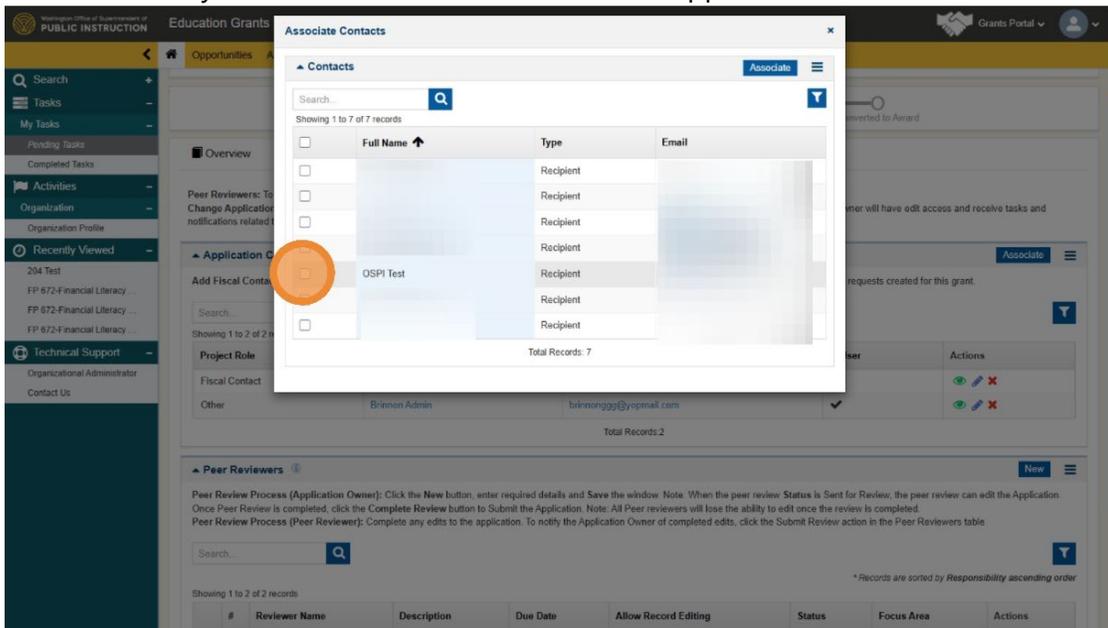
8. When you're ready to send the invitation, click the blue "Send" button at the bottom left of the pop-up box.



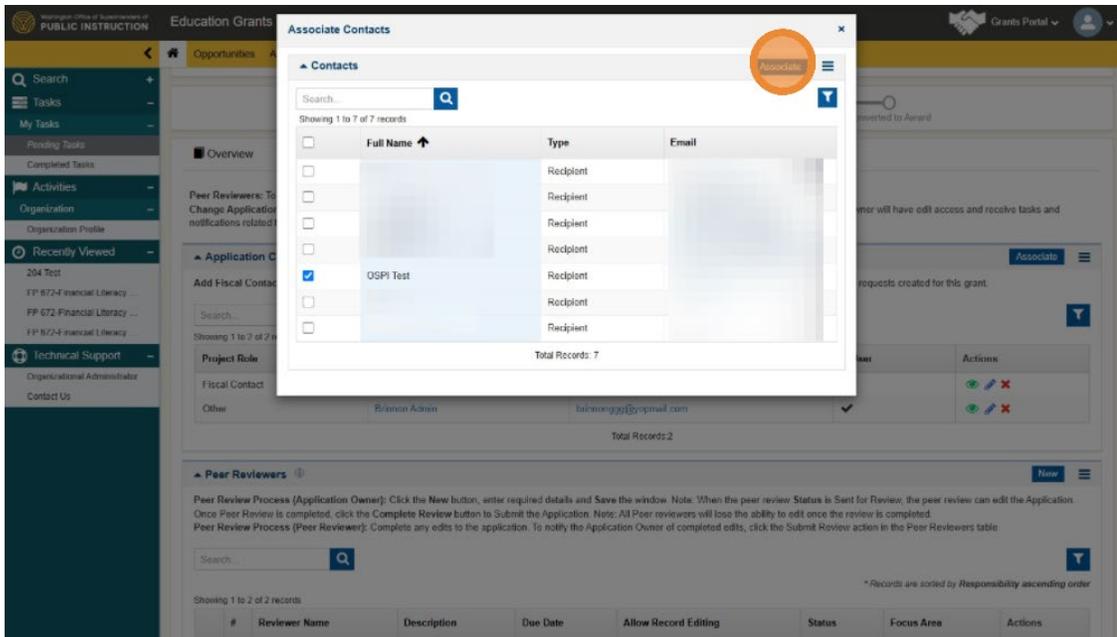
9. You will receive a confirmation message. Click "Ok."



- Select the user you would like to associate with this application.
10. Select the user you would like to associate with this application.

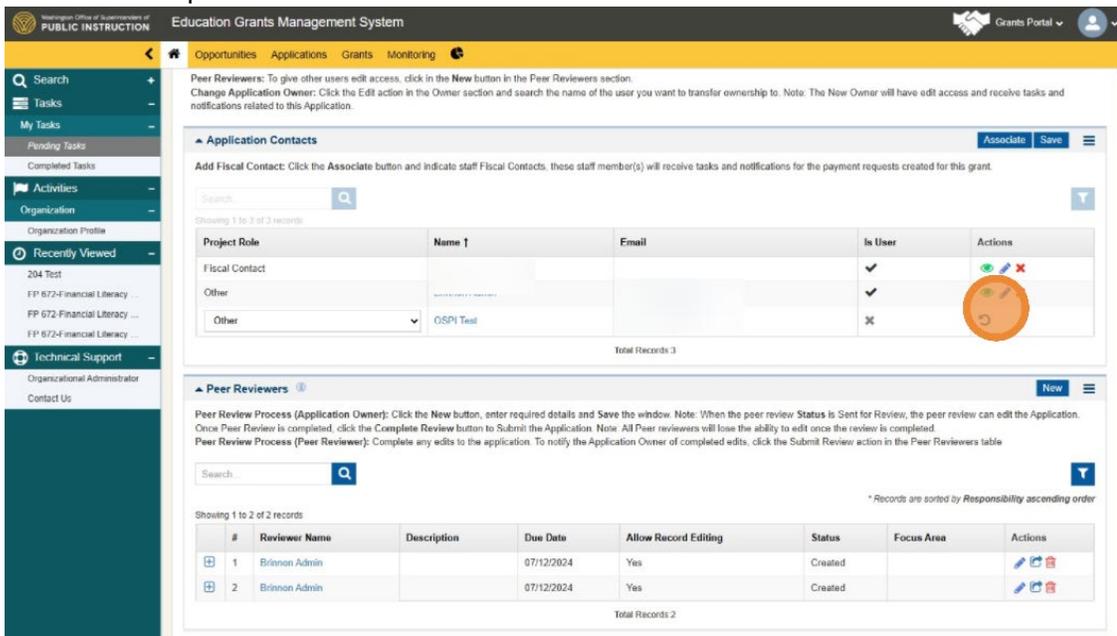


11. Click the "Associate" button.



12. Click the "X" to close the pop-up window.

13. Click the blue pencil to edit.



14. Select the Project Role from the drop down menu and click save.

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Peer Reviewers: To give other users edit access, click in the **New** button in the Peer Reviewers section.  
**Change Application Owner:** Click the **Edit** action in the Owner section and search the name of the user you want to transfer ownership to. Note: The New Owner will have edit access and receive tasks and notifications related to this Application.

**Application Contacts** Associate Save

Add Fiscal Contact: Click the **Associate** button and indicate staff Fiscal Contacts, these staff member(s) will receive tasks and notifications for the payment requests created for this grant.

Showing 1 to 3 of 3 records

Project Role	Name 1	Email	Is User	Actions
Fiscal Contact			✓	👁️ ✎️ ✖️
Other			✓	👁️ ✎️ ✖️
Fiscal Contact	OSPI Test		✗	🔄

Total Records 3

**Peer Reviewers** New

Peer Review Process (Application Owner): Click the **New** button, enter required details and **Save** the window. Note: When the peer review **Status** is **Sent for Review**, the peer review can edit the Application. Once Peer Review is completed, click the **Complete Review** button to Submit the Application. Note: All Peer reviewers will lose the ability to edit once the review is completed.  
**Peer Review Process (Peer Reviewers):** Complete any edits to the application. To notify the Application Owner of completed edits, click the **Submit Review** action in the Peer Reviewers table

Showing 1 to 2 of 2 records

\*Records are sorted by **Responsibility ascending order**

#	Reviewer Name	Description	Due Date	Allow Record Editing	Status	Focus Area	Actions
1	Brinnon Admin		07/12/2024	Yes	Created		👁️ ✎️ ✖️
2	Brinnon Admin		07/12/2024	Yes	Created		👁️ ✎️ ✖️

Total Records 2

*Tip! If you see an orange dot next to a tab, it means there are required fields in that section which have not been addressed.*

- Click through each tab to make sure you have completed all required fields. Be sure to click save!

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OSPLFN-0158 Cancel Save

FP 204 - K-12 Intensive Tutoring

Form Name: [Redacted] Is Form Validated? Yes Last Modified By: Kim Hoss Last Modified Date: 07/11/2024 2:02 PM  
 Application ID: [Redacted] Application Title: 204 Test Application Due Date: 07/12/2024 Last Submitted Date: [Redacted]  
 Organization Code: 16046 Organization Name: Brinnon School District

Required to Save Required to Submit

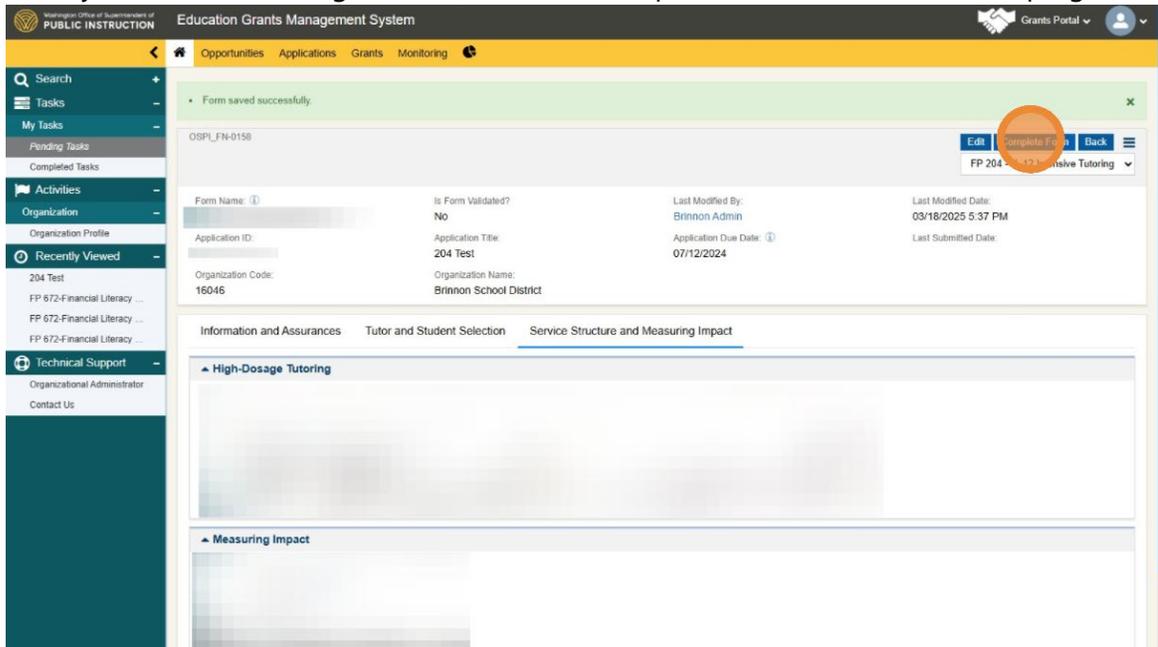
Information and Assurances Tutoring Student Selection Service Structure and Measuring Impact

**Information**

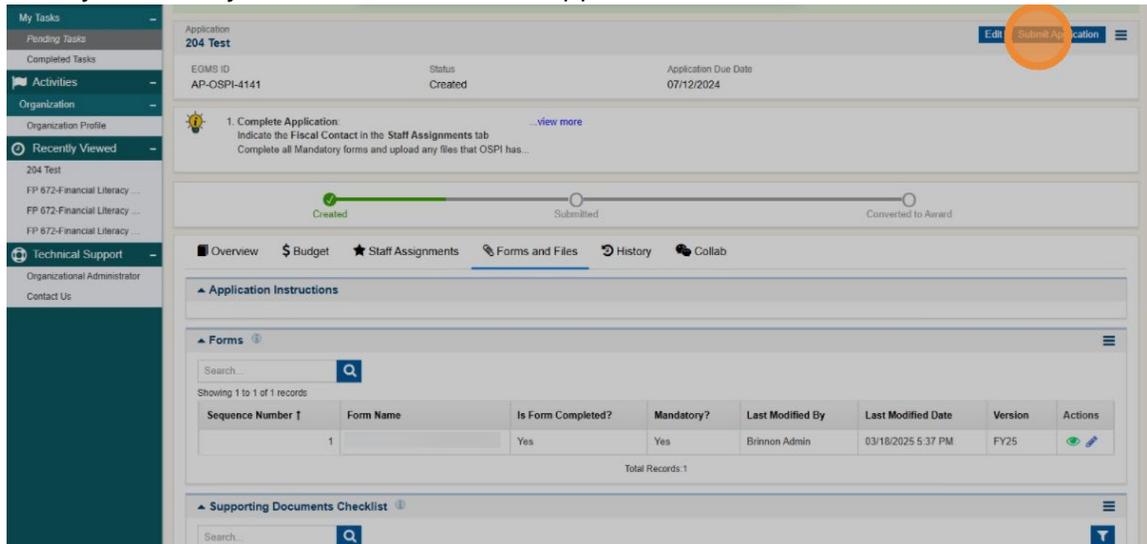
**Assurances**

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16. Once you are done adding content, click the "Complete Form" button on the top right.



17. Once you're ready, click the blue "Submit Application" button."



18. The system will ask you to confirm your application submission with a pop-up window.

*Once you've submitted your application, the page will refresh and the status bar will update to "Submitted."*