Important information regarding your username and password in SAGE

The SAGE username and password belong to an individual person. That username is then added to the organization and given access to the grant documents. Therefore, the person associated with the username should be the person using it.

When applying for grants, authorizing contracts or electronically signing documents in SAGE, the grantee is entering into an agreement with the State of New Jersey. The person who is an Authorized Official or Agency Administrator should be a person who is authorized, on behalf of the organization to enter into an agreement with the State. This is very important

When a person leaves the organization, regardless of their role in SAGE, their username and password should not be passed along to the person taking their place. When you change the information in “My Information” for a username, you are changing all records of what that previous holder did in SAGE and indicating the new holder of the username created, submitted and authorized documents as far back as the previous holder held that username. In doing so, you are changing the paper trail of actions taken in SAGE and the record of who took them.

Before a person who works in SAGE leaves your organization, make sure that a new person is signed up and given access to SAGE by acquiring a username and password. Be sure to assign them a role and that they are “added” to all documents they will need to access. The previous user should be deactivated upon their departure. Remember to not keep the same username and password by changing the personal information for that username.

Update your email addresses

It is important that you check that the email address you used to register for SAGE is kept up to date in the system. This is the email that will be used to send you a new password should you request one. It is also the email address to which notifications regarding your grant will be sent.   Here you may set up a general email address associated with the organization for you or another person of the organization to use to receive notifications. Neither, Department of State or Division staff will have access to your passwords. If you forget it, you must request a new password.

How to De-activate a username

To deactivate a person from your organization, you should log into SAGE using a different username than that of the person you are deactivating. Click on the underlined name of the organization under Organizations on the top, right of the Main Menu.   Look for the person’s name under Current Members and put an end date under System Person Active Dates and SAVE.

While you are on the “Organizations” page please check your contact information and you should check your Additional Profile Information to be sure that the contact information for the departing person is changed if applicable. Click on the Organization Details and then the following, update the information and SAVE.

Additional Profile Information - Required for applicants to the NJ Department of State, Council on the Arts, Historical Commission, Office of Faith-Based Initiatives, and Travel and Tourism

How to add a new user to your organization and to existing documents

In order to add a new user to your organization the new user has to create an account on the log in page. An Authorized Official should log into SAGE. Click on Organizations, top, right on the Main Menu, then Organization Members. Click on Add Members tab and use the search for the new person's name. When you find the correct person, check off the small blank box to the left of the person's name, choose a role from the pull down bar and give a start date under System Person Active Dates and SAVE.

Once the person has been added to the organization, you can add them to each document by opening the document, click on ADD/EDIT people under Management Tools. Again, check off the small blank box to the left of the person's name, choose a role from the pull down bar and give a start date under System Person Active Dates and SAVE. Each document must be done separately.

If an Authorized Official left your organization without giving another employee access to SAGE and you have no access, please contact your granting division by email, stating the previous username is no longer with you and that you will need the new username to be added to the organization and given access to specific documents. Please provide all necessary names, usernames, roles and documents.

Roles

There are three roles for applicants/grantees in SAGE. The **Authorized Official (AO)** should be someone who is authorized on behalf of the organization to enter into an agreement with the State of New Jersey. The Authorized Official is the only person who can add/deactivate people to and from your account and documents. An AO may create, electronically sign and submit documents. You may have more than one Authorized Official. (For a more detailed explanation, see below)

An **Agency Administrator (AA) should** also be someone who is authorized on behalf of the organization to enter into an agreement with the State. An AA may also may create, electronically sign and submit documents but may not add people to documents or the organization. You may have more than one Agency Administrator.

Agency Staff (AS) may work in a document adding or updating information, but has no authority to add/edit people or create, sign or submit documents. An Authorized Official must give Agency Staff access to each document by adding them.

You should have more than one person signed up to use SAGE. If you or someone leaves suddenly or if the person who does the work in SAGE is out of the office and the Division has questions about your documents, perhaps under a deadline, someone in your organization should have access to SAGE and your documents. Notification requesting additional information about your grant will be sent to your AO & AA. You may have more than one of any of the roles.

Applicant User Types

After the registration process and once you have gained access to SAGE you will be able to assign user roles to various people in your organization. There are three security roles defined for users: 1) Authorized Officials, 2) Agency (i.e. organization) Administrator, and 3) Agency (i.e. organization) Staff. These roles have different security access to work on documents. Once Authorized Officials are identified for each organization and their new user accounts created, the Authorized Officials may select and enter their own organization's staff into the system and assign them the roles of Agency Administrator or Agency Staff.

Authorized Officials and Agency Administrators will be able to:

• Edit and delete user account information for themselves and for Agency Staff
• Initiate and submit declarations of intent; initiate and submit applications
• Enter, update and delete information on applications
• Upload and attach files to applications
• Cancel applications before submission
• Access agreements to terms and conditions, contracts and payment vouchers
• Modify applications and forms when in the status of Modifications Required
• Check on the status of each application
• Assign and grant permissions to Agency Staff

Agency Staff will be able to:

• Edit their own user account information
• Enter, update and delete information on applications when permission is granted
• Upload and attach files to the applications when permission is granted
• Modify applications with status of Modifications Required when permission is granted
• Check on the status of applications when permission is granted

Adding new users and assigning roles

For applicants to add new additional users to their organization after they have gone through the initial registration process and once approved in SAGE they should do the following:

1. The new staff member, not yet approved, must request access to SAGE on the login page.
2. Any already approved Authorized Official or Agency Administrator must login and click the name of their organization on the main menu to enter the profile.
3. Click Add Members
4. Type all or a portion of the new user's name, then click search.
5. Place a check in the box next to the user they want to add, select a role for them and enter a date in the first date box.
6. Click SAVE at the top of their organization's profile.

This can be repeated as many times as needed.