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 My Organization on 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 "My Organization" page, you should check your Additional Profile Information, above the members section, to be sure that the contact information for the departing person is changed if applicable. Click on 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, an Authorized Official should log into SAGE. Click on the underlined name of the organization under My Organization on the Main Menu. 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 Activities. 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.

Can supplement or be added to the following:

Sage System Information and Application Instructions

To access the SAGE system log on to www.sage.nj.gov

If you are not registered for SAGE and you are not applying on behalf of a county or municipality, click on “Request Access to SAGE” on the left side of the screen.

If you are already registered do not register again.

Fill out the requested information. Some of the information may be used for correspondence so fill it out as it should appear on a formal letter.

The email address you provide will be the one that information is sent to from the SAGE system, including help to reset your password. Keep track of your username and password as you will need these through the entire process. If you are staff and applying on behalf of someone authorizing the grant application, use that person’s email address and create a separate username and password for yourself.

If you have forgotten your password, click on the “Reset Password” option in the login box. You will be asked to enter your email address and login. The system will email your password to you if it finds a matching email address. Please note that you have to enter the email address that is in the system so that it can be matched to the username’s password. This is also the email address to which a new password will be sent.

Helpful hint: You should always make sure your SAGE account is up to date and assigned a valid email address. The Authorized Official should be the person who is ultimately responsible for the grant and can sign the contract.

Once you have requested and received access to SAGE, please review your organization’s profile information in the *Main Menu* to make certain the information is correct. Organizations will be able to review and update their information by clicking on the *My Information* and *My Organization* tabs in the *Main Menu*.

On the *Main Menu* you will see a box labeled *My Information*. This is the contact information for the primary contact person for the organization. You can edit the information by clicking on the *view/edit* button. You can change the primary contact in the *My Organization* form by choosing the *view/edit* button.

You will see applications available to you under *My Active Documents*. If you already have an application started you will find it under *All of My Documents*. In the future the two options will isolate current applications or reports you are currently working on and documents that you have submitted in the past.

My Messages, the system will indicate whether you have messages and you can select them for review. After you have read all of your message a note will appear indicating that your messages have been read, but you will still be able to access them.

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 or the bottom of their organization's profile.

This can be repeated as many times as needed.