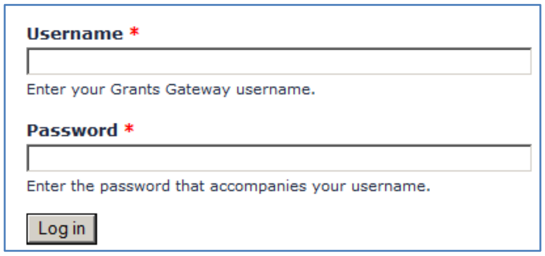
Executive Order #38

EO38 Disclosure - Quick Reference Guide

Disclosure Login

1. From the Executive Order 38 page (www.executiveorder38.ny.gov) page click the **Disclosure** link. Note: you can also get there by clicking the Disclosure link after completing the Determination form.

2. This will bring you to a login screen. Log into the Disclosure by entering your Grants Gateway Username and Password.



Type your Username and Password and then Click the **Log in** button.

A screen will display with four tabs: 1. Information | 2. Update Details | 3. Submit Disclosure | 4. Apply for Waiver

The 1. Information tab is the default.

Provider Information and Update Details

1. All of the information in the 1. Information tab comes directly from Grants Gateway.

2. You must complete the 2. Update Details tab information prior to Submitting a Disclosure and/or Applying for a Waiver.

3. For more information on the 1. Information and 2. Update Details tabs, please refer to the documentation found on the Executive Order #38 Training webpage (http://executiveorder38.ny.gov/training).

4. Once you are ready to move on, Click the 3. Submit Disclosure tab at the top of the page:

Submit (Add) Disclosure

1. There are three EO38 **Worksheets** on the bottom left-hand corner that you can open and fill out if needed.

2. Any **Submitted Disclosures** will appear on the bottom right-hand corner of the screen.

3. To Add a Disclosure, Click the Add Disclosure button.

Step 1: Enter Organization Information

Step 1 - Organization Information

1. If applicable, check the box stating that " ☐ Our organization is a Covered Provider " and choose the timeframe for the Covered Reporting period (from the drop-down list).

2. Click the **Upload PDF** button to upload the PDF copy of the Determination Worksheet:

Step 2: Add a Covered Executive Step 2 - Covered Executive

1. If applicable, check the box stating that ☐ This organization does **NOT** have staff that meets the definition of a Covered Executive.
2. To Select an Executive or Add a New Executive, click the [+] Add an Executive not listed link.
3. Click **Select Executive from Executive List:** to choose an Executive from the list.
4. The Executive's name will populate. Fill out the rest of the **Executive Information --- All fields are required.** form, and then select [Submit].
5. To Add a New Executive, select the ☐ **Add New Executive** checkbox:
6. Fill out the entire **Executive Information --- All fields are required.** form, and then select [Submit].

Step 3: Disclose Administrative Expenses Step 3 - Administrative Expenses

Fill in the **Total Administrative Expenses** and **Total Program Services Expenses** fields, then complete the rest of the **Step 3 - Administrative Expenses** form.

Step 4: Add Preparer Information Step 4 - Preparer Information

1. To select a Preparer that is listed, click the radio button next to their name: ○ Steve M. Woods, ABC Provider,(Accountant) (Show/Hide Info)
2. To add a Preparer not listed, click the [+] Add a preparer not listed link, fill out the **Preparer Information** form completely, then select [Submit] .

Confirm Disclosure

1. When everything is completed on all the forms, select [Confirm Disclosure] .
2. You will see the completed Disclosure and a message will appear stating that you must attest to the information on the form: ⚠ Please attest to the information being submitted below
3. Scroll down to the **Application Affirmation** section and check the two ☑ I affirm check boxes.

Note: You can go back to the Disclosure form to Edit the form by clicking the [Edit] button.

Note: Once you Affirm Disclosure, you cannot go back and make any changes to the form.

4. Click the [Affirm Disclosure] button to finalize the Disclosure.
5. You will receive a success message: ✔ Disclosure has been successfully attested. Contact your agency representative to modify this disclosure.
6. To Print the Disclosure, click the [Generate Disclosure PDF.] button.
7. You can log out of the Disclosure form by clicking the Logout link.