Executive Order 38 – Information/Details

This section will familiarize the user with the methods used to navigate through the Information and Details section.
Information

From the Executive Order 38 webpage http://executiveorder38.ny.gov, click the Disclosure link.

Log into the Disclosure section using your Username and Password, provided by Grants Gateway:
After logging in, the next screen that is displayed is the Information screen:

There are four tabs, **Information**, **Update Details**, **Submit Disclosure** and **Apply for Waiver**:

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**The Information tab**

The Information tab allows you to:

1. View your Provider information as well as the Contact Information of the **State Agency With Most Contracts**

Select the **Contact Info** link to view contact information:
The Update Details tab

Click the Update Details tab.

The Update Details section will open:

The Update Details tab allows you to:

1. Add your Covered Reporting Period, change the Lead Agency listed and select other State Agencies
2. Add, Edit or Delete a Preparer (you can also Deactivate or Activate a Preparer)
3. Add, Edit or Delete a Covered Executive (you can also Deactivate or Activate an Executive)

Covered Reporting Period/Lead Agency

To access the Add CRP/Lead Agency screen, click the Add CRP/Lead Agency link.
The popup will open:

To choose a **Lead Agency**, click the radio button of the Agency you wish to select.
To choose Other State Agencies, click the check box of the Agencies you wish to select.

To choose the CRP Start or End Date, click the field for the date you wish to select.

To change the Month and Year, use the arrows at the top of the calendar to go back or forward.
Once you have the correct Month and Year, click the correct day

Once you have made your changes in the **Lead Agency and Other State Agencies** popup, Click the Submit button.
You will receive a message telling you that the Lead Agency, Other State Agencies and CRP Information have been Added/Updated successfully:

![Image of Executive Order #38]

Under the **Action** column you will notice that there are some icons for the information you added to the Details section:

- **Delete** – Allows you to delete the row of information associated with the Delete button.
- **Edit** – Allows you to edit the row of information associated with the Edit button.
- **Submitted** – This information has been used on a Submitted Disclosure and cannot be deleted or Edited…

### Preparer List

To add a **Preparer**, click the **Add Preparer** link.
The **Preparer Information** popup screen will open:

![Preparer Information Pop-Up](image)

**Note:** You must enter all Required Fields denoted by a red asterisk *

Once you have entered all of the information for the Preparer; click the **Submit** button.

If you wish to clear all of the information from the Preparer information and start over; click the **Reset** button.
Once you Submit, you will receive a message telling you that the Preparer has been Added/Updated successfully:

Note: You can Deactivate or Activate a Preparer or Covered Executive on your list, by clicking the Deactivate/Activate link. This feature would be used if this person was used in the past as a Preparer or Executive, maybe they left your Agency and you did not want them to show up on the list. If they were used in the past, you cannot delete them.

Covered Executive List

To add a Covered Executive, click the Add Covered Executive link.

Once you have entered the Covered Executive’s Name; click the Submit button.

If you wish to clear all of the information from the Covered Executive popup and start over; click the
**Reset** button.

Once you Submit, you will receive a message telling you that the Executive Name has been Added/Updated successfully:

![Covered Executive List](image)

**Note:** The red text in the Covered Executive section:

Adding executives here doesn't mean that you have requested a Waiver or completed a Disclosure, you still need to complete the Disclosure and Apply for a Waiver if applicable.

To move on to the Disclosure, click the **Submit Disclosure** tab.

![Executive Order #38](image)

If you want to apply for a Waiver, click the **Apply for Waiver** tab.