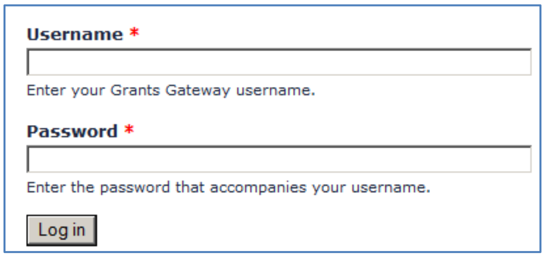
Executive Order #38

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.



3. Type your Username and Password and then Click the **Log in** button. This will bring you to the Provider Information screen.

Provider Information

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

2. Once you are ready to move on, Click the Disclosure tab at the top of the page.

Add Disclosure

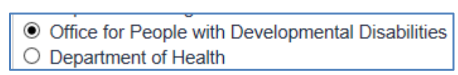
1. There are three EO38 worksheets on the bottom left-hand corner that you can open and fill out if needed.

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

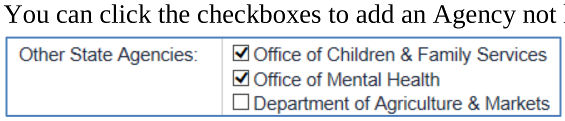
3. To Add a Disclosure, Click the Add Disclosure button.

Select Agencies, Covered Reporting Period and Upload Determination Form

1. You can choose a different Lead Agency by clicking the circle for a different Agency.



3. You can click the checkboxes to add an Agency not listed, or uncheck the checkbox to remove an Agency listed.

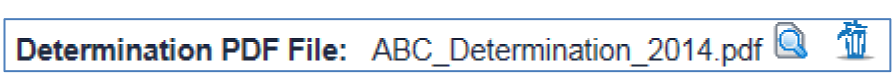


4. Enter the Covered Reporting Period by clicking within the field. A calendar will open and you can select the Month, Year and Day from the calendar.

5. Click the Upload button to Upload a copy of the Determination form. Once you click Upload you will be able to go to the area where you saved the pdf and upload the file.

6. You will receive a message asking if you want to upload this file. Click OK to continue. Clicking Cancel will cancel the Upload.

   Note: You will see the Uploaded Determination in Step 1of the Disclosure.



Complete Disclosure

You will see your Lead Agency and other State Agencies at the top of the Disclosure once you start a new Disclosure.

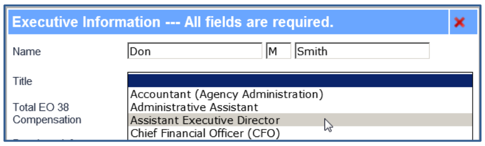
1. In Step 1, you can check the box stating that you are a Covered Provider. The year for the Covered Reporting period and the Determination PDF displays in this section, as well. You can open the Determination PDF by clicking the **View pdf** button. You can delete the Determination PDF by clicking the **Delete File** button.

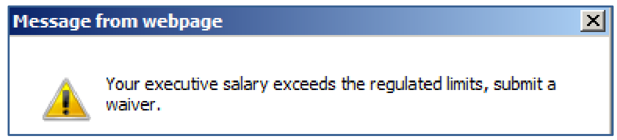
2. In Step 2, you can open and complete the **Executive Compensation Calculation Worksheet** by clicking the link. You can also check the box stating that your organization does not have staff that meets the definition of a Covered Executive, if this applies.

3. You can add Covered Executives by clicking the **Add an Executive not listed** link. Add an Executive not listed

4. Once you click the Add an Executive not listed link, the **Executive Information** screen will open. **Note:** All fields are Required.

5. Most of the fields are free text fields, where you can type information in the field. Title and Waiver Status are dropdown fields, where you have to make a selection from the dropdown. When you complete the Executive Information screen, Click Submit.





6. When submitting the Executive Information screen, you may get a warning that you must Submit a Waiver. Click the **OK** button to continue. **Note:** To edit the Executive's information, click their name which displays as a link on the Disclosure.

7. In Step 3, you can Click the **Program Services and Admin Expenses Calulation worksheet** link to complete that worksheet.

8. Fill in the **Total Administrative Expenses** and **Total Program Services Expenses** fields, the **Covered Operating Expenses** field fills in automatically.

9. Click the **Calculate** button for the **Administrative Expenses % Calculation,** then, choose a **Waiver Status** from the dropdown.

10. In Step 4, you can add a Preparer not listed by clicking the **Add Preparer not listed** link. Add a preparer not listed

11. The Preparer Information screen will open. Fill out the form and Click the Submit button. **Note:** you must fill in all of the Required fields or you will receive a popup message telling you what field you are missing. Jon M. Smith, ABC Provider

    Note: You can Edit or Delete the Executive or Preparer Information by clicking the person's name to open the form.

12. When everything is completed on the form, Click the **Confirm Disclosure** button. Confirm Disclosure

13. 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

14. Scroll down to the **Application Affirmation** section and check the **2** boxes that you affirm. I affirm

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

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

15. Click the **Affirm Disclosure** button to finalize the Disclosure. Affirm Disclosure

16. You will receive a success message: Disclosure has been successfully attested.Contact your agency representative to modify this disclosure.

17. To Print the Disclosure, click the **Generate Disclosure PDF** button. Generate Disclosure PDF

18. You can log out of the Disclosure form by clicking the **Logout** link. Logout