GRANTS AND CONTRIBUTIONS ONLINE SERVICES

USER GUIDE: ACCOUNT REGISTRATION AND MANAGEMENT

MARCH 2019



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IMPORTANT THINGS TO REMEMBER

- **Web browsers:** The Grants and Contributions Online Services (GCOS) is compatible with the following Web browsers: Windows Internet Explorer 9, Mozilla Firefox, Google Chrome, Microsoft Edge and Apple Safari.
- **Timeout feature:** After approximately 15 minutes of account inactivity, a warning message will be displayed informing you that the session is about to expire.
- **Upload Restrictions:** Each document uploaded to the GCOS cannot exceed 15MB in size; however there is no limit to how many documents can be uploaded.
- **Contact Us:** You can submit technical and non-technical questions to the GCOS team using the Contact Us link located under the Help and Support section.
- Automated correspondence: You should add the following e-mail address to your contacts: noreply-aucune-reponse@hrsdc-rhdcc.gc.ca to prevent e-mails from being sent to the junk/trash folder.
- Creation of a GCOS account: If you need help creating a GCOS account, consult this user guide, send an email to the GCOS team at <u>NA-GCOS-SELSC-GD@hrsdc-rhdcc.gc.ca</u> or contact the Employer Contact Center at 1-800-367-5693

GETTING STARTED

Be sure to set up your GCOS account well before any funding application deadlines, as it may take several business days to complete account registration.

There are two types of users within one GCOS account (each individual using the organizations' GCOS account must have their own user name and password):

• Primary Officer (PO):

- must have the authority to act on behalf of the organization, including the authority to sign applications for funding, agreements and project management items
- o there can only be one PO per organization account
- user who created the organization's account will automatically become the PO; however the PO can be replaced at any time
- PO is required to validate their identity

Representatives:

- o required to create their own username, password and user profile
- must be invited to join the organization's GCOS account by the PO, or an authorized representative with the right to invite representatives
- o assigned various function-specific rights by the PO, or authorized representative

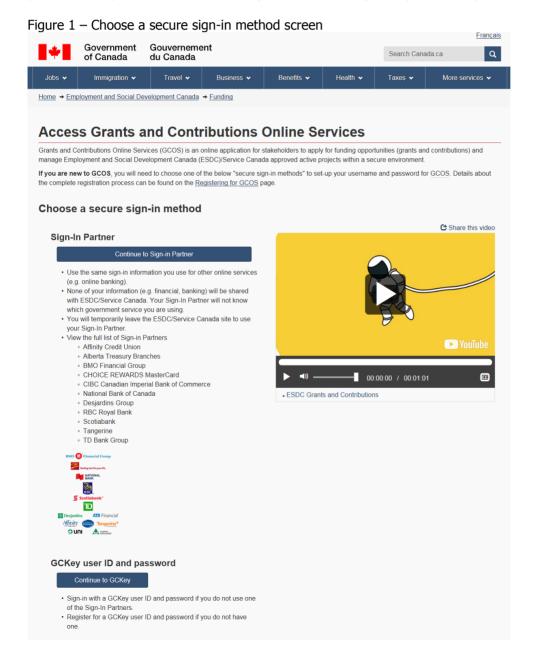
1. CREATING YOUR PROFILES

As the Primary Officer of your organization, you will need to create a user profile as well as an organization profile. To become a representative of an existing GCOS Account, please complete sections:

- o 1.1 Choosing your sign-in method
- o 1.2.1 Create your user profile

1.1 CHOOSING YOUR SIGN-IN METHOD

You will need to choose one of the secure sign-in methods (Figure 1) to log into GCOS. Please note that you will be required to use the same sign-in method every time you access your account.

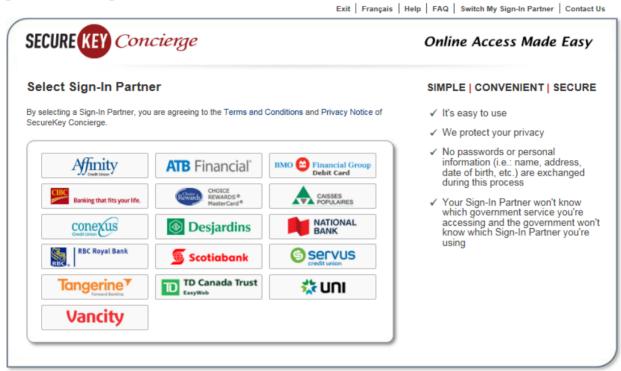


1.1.1 SIGN-IN PARTNER

You may use a username and password that you already have with one of the financial institutions on the Government of Canada's list of <u>Sign-in-Partner</u>, so that you do not have to remember new sign-in information.

- Access the GCOS Sign-in page
- Click Continue to Sign-In Partner (Figure 1)
- Select your financial institution by clicking their logo (Figure 2)

Figure 2 – Select Sign-In Partner screen



Terms and Conditions | About SecureKey Concierge | Privacy Notice

- Enter your existing username and password as you would when accessing your financial institution account
- You will be redirected to GCOS to the Create my profile screen, where you will need to read the Notice to Applicants
- At the bottom of the page, click I agree to continue with the registration process.

1.1.2 GCKEY

GCKey will allow you to securely conduct online transactions with Government of Canada programs and services. However if you already have a GCKey with another Department, you will need to register for a new one in order to create your user profile for GCOS. (Please Note the same username and password can be used)

• Access the GCOS Sign-in page

- Click Continue to GCKey (Figure 1)
- Select Sign Up (Figure 3)

Figure 3 - Welcome to GCKey screen



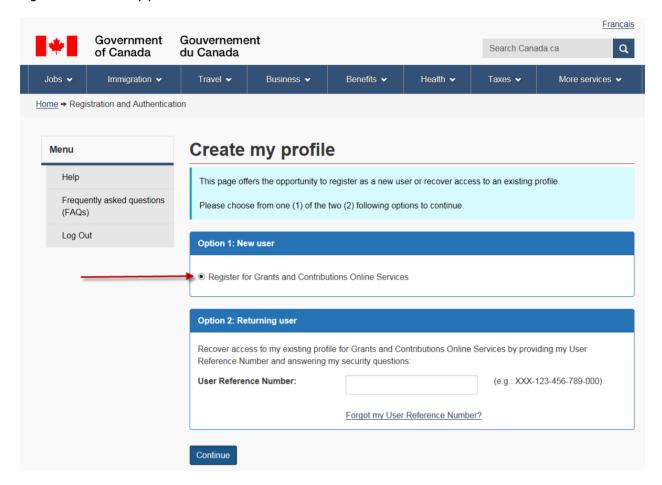
- Click I accept to Agree to the Terms and Conditions of Use
- Create your Username and click Continue (Keep your Username in a safe place as you will not be able to retrieve if forgotten)
- Create and Confirm your Password and click Continue
- Create your Recovery Questions, Answers and Hints to help you if you forget your Password and click Continue
- Click Continue
- You will be redirected to GCOS to the Create my profile screen, where you will need to read the Notice to Applicants
- At the bottom of the page, click I agree to continue with the registration process

1.2 CREATING YOUR PROFILES

1.2.1 CREATE YOUR USER PROFILE

As a new user, you must select Option 1: New user, on the create my profile screen (Figure 4). If you are a returning user, please consult section 6 of this User Guide.

Figure 4 – Create my profile screen



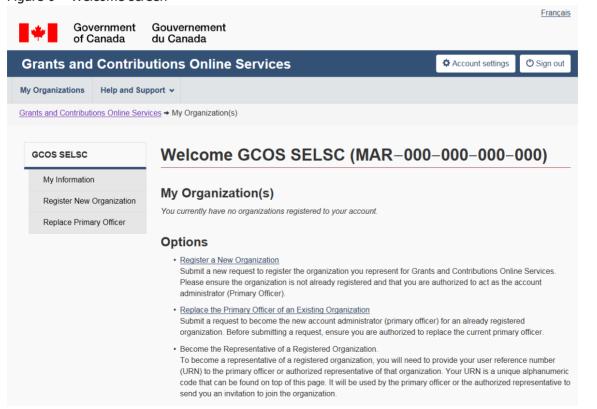
- Select Option 1: New User by selecting Register for Grants and Contributions Online Services
- Click Continue
- Complete all required fields for your User and Contact Information, as well as your security questions
- Click Continue
- Review and confirm all your information by clicking Submit
- The Thank you screen (Figure 5) will provide you with your User Reference Number (URN). Take
 note of this number, and keep it somewhere safe as you may need it to confirm your identity as a
 GCOS user
- If you are going to be a Representative for your organization, provide your URN to your organization's Primary Officer, as they will then be able to invite you to join the organization account

Figure 5 - Thank you screen



- Click on Continue
- You will then be redirected to the Welcome screen (Figure 6)

Figure 6 - Welcome screen

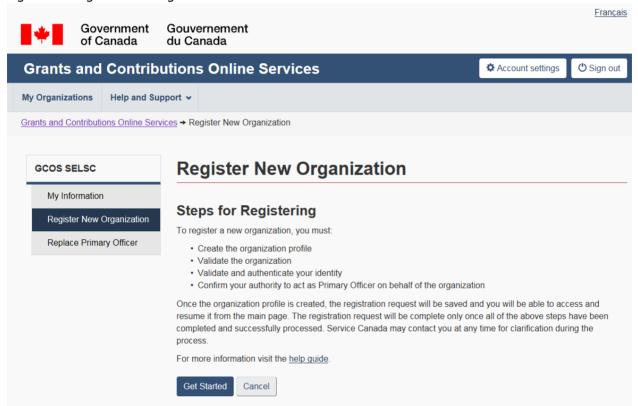


1.2.2 CREATE YOUR ORGANIZATION PROFILE

If you are intending to be the Primary Officer of an organization not yet registered for the Grants and Contributions Online Services, you will need to create your organization profile. If you are replacing the Primary Officer of an existing account, please refer to section 5 of this User Guide.

• Click on Register a New Organization from the Welcome Screen (Figure 6)

Figure 7 – Register New Organization screen



- Click Get Started (Figure 7)
- You will be redirected to the Create the Organization Profile Screen
- Complete all required fields
- Click Save and Continue to proceed with the registration process.

2. VALIDATING YOUR PROFILES

At any time during the registration process, you can view your status by clicking on the name of the organization you're creating from the Welcome screen (Figure 6). You will then be directed to the New Registration Summary screen (Figure 8).

2.1 VALIDATE THE ORGANIZATION

Clicking Save and Continue on the Create the Organization Profile screen or clicking on the Incomplete link related to the validation of the organization step from the New Registration Screen (Figure 8) will redirect you to the Validate the Organization Screen (Figure 9). An Organization Profile requires a business number, legal and operating name and address, as registered with the Canada Revenue Agency (CRA). If possible, use your business payroll 'RP' account number (using the following format ########PP###) to accelerate the validation process.

Figure 8 – New Registration screen

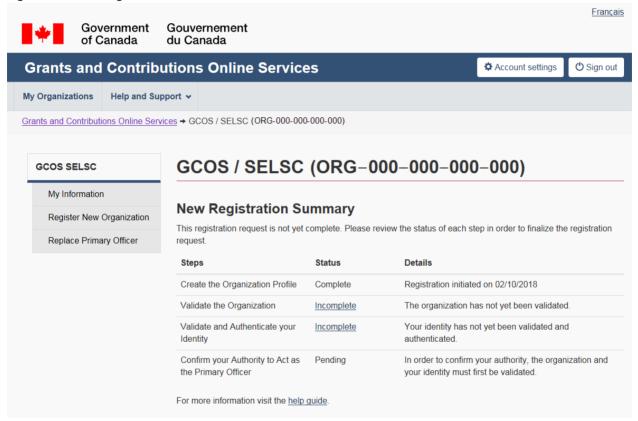
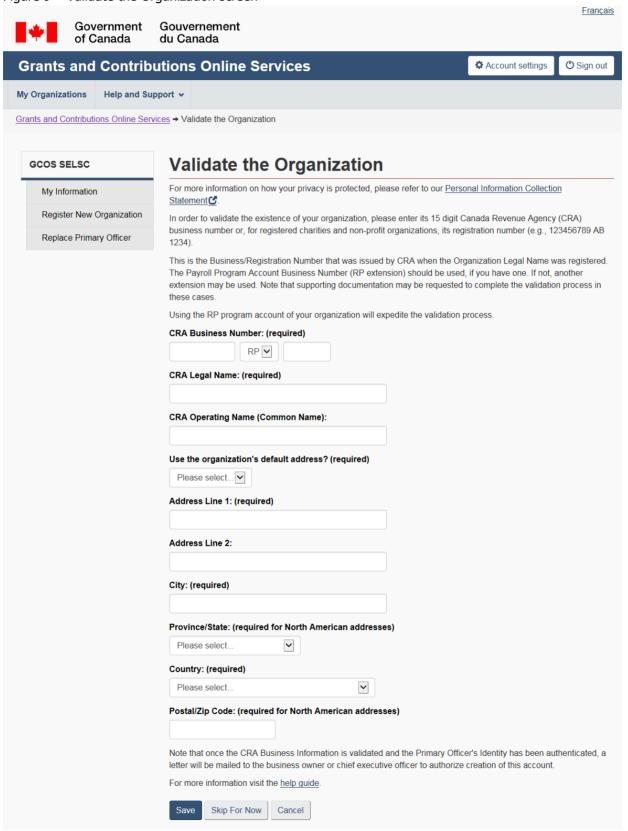


Figure 9 – Validate the Organization screen



- Complete all required fields (Figure 9)
- Click Save
- If using an RP account, consent will be required from a CRA Authorized Representative of your organization. Only once consent is received, can the organization information be validated with CRA data
 - o If you are the CRA Authorized Representative, select 'Yes' to indicate that you are the Authorized Representative, you will automatically be taken to the Consent Screen.
 - o If you are not the CRA Authorized Representative, select 'No' under Authorized Representative and identify the correct person under Authorized Representative's Information. An email will be sent to the identified Authorized Representative. They can provide consent without having to create a GCOS account. It may be prudent to send your CRA Authorized Representative an email outlining why they are receiving the notification from GCOS asking for their consent. (The request for consent from your CRA Authorized Representative expires within 7 days and will need to be re-initiated if not completed within this timeframe.)
- If using another CRA account (RT, RR, RC, Etc.) Clicking Save will bring you to the screen which displays your Organization ID (i.e. ORG-000-000-000). Take note of this Number for reference. (Figure 10)

Figure 10 – Validate the Organization screen (Organization ID)

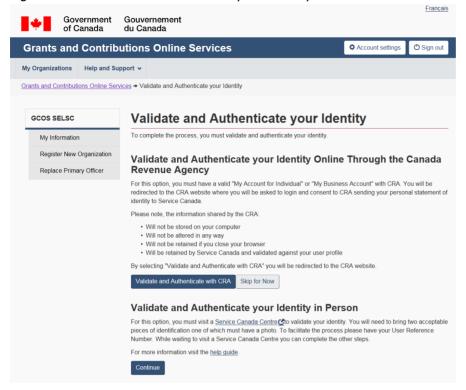


2.2 VALIDATE AND AUTHENTICATE YOUR IDENTITY

To complete the process, you must validate and authenticate your identity.

- Click on the Incomplete link related to the validate and authenticate your identity step from the New Registration Screen (Figure 8)
- You will be redirected to the Validate and Authenticate your Identity Screen (Figure 11) where two options are provided to you.

Figure 11 – Validate and Authenticate your Identity screen



2.2.1 VALIDATE AND AUTHENTICATE YOUR IDENTITY ONLINE

- To be able to use this option, you must have a valid My Account for Individual or My Business Account with CRA
- By selecting Validate and Authenticate with CRA (Figure 11) you will be redirected to the CRA website, follow the instructions on your screen to login to your CRA account.

2.2.2 VALIDATE AND AUTHENTICATE YOUR IDENTITY IN PERSON

- Visit a <u>Service Canada Centre</u> to validate your identity.
 - You will need Your User Reference Number (i.e. MAR-000-000-000) and two pieces of identification from the list below (one of which must have a photo):
 - Provincial Driver's Licence
 - Canadian Passport
 - Provincial Health Care Card
 - Birth Certification (provincial)
 - Permanent Resident Card
 - Certificate of Canadian Citizenship
 - Certificate of Indian Status Issued by the Government of Canada
 - Record of Landing
 - Provincial ID Card
 - Foreign Passport
 - Refugee Protections Claimant Document
 - Work Permit

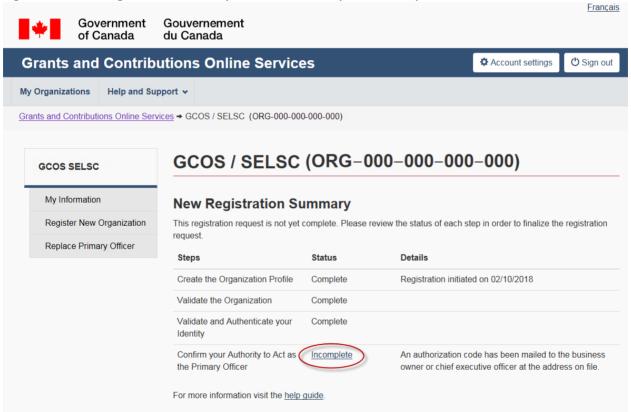
3. AUTHORIZATION CODE

This is the final step required to set up your GCOS account. Once the Organization and Primary Officer's (PO) identity have been validated, a letter will be mailed to the head of the organization (the letter is addressed to the Chief Executive Officer) – the letter will contain an authorization code. The head of your organization will be instructed to provide the PO with the authorization code to confirm his agreement with the creation of the account and your authority to act as the PO.

To complete the registration process:

- Login to GCOS and select the organization from your Welcome screen (Figure 6)
- Click the Incomplete hyperlink beside the Confirm your Authority to Act as Primary Officer on Behalf of the Organization step (Figure 12)
- Enter the code in the Authorization Code field (Figure 13).
- Click Continue. You have completed your GCOS account registration and are ready to use GCOS to apply for and manage your ESDC funding.

Figure 12 - New Registration Summary screen - confirm your authority



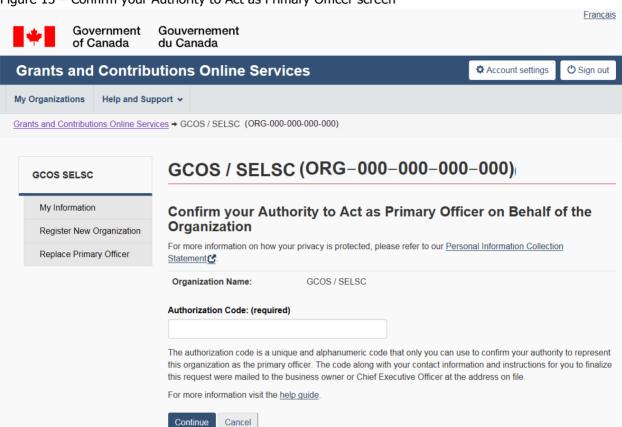


Figure 13 – Confirm your Authority to Act as Primary Officer screen

4. ADDITIONAL ORGANIZATIONAL INFORMATION

The first time that you access GCOS by clicking on the Gs&Cs Online services (Figure 14) link, you will be required to complete additional organizational information on the Organization Identification Screen (Figure 15).

- Login to your GCOS account
- Click on your Organization name
- Click Gs&Cs Online Services (Figure 14)

Figure 14 – Grants and Contributions Online Services screen

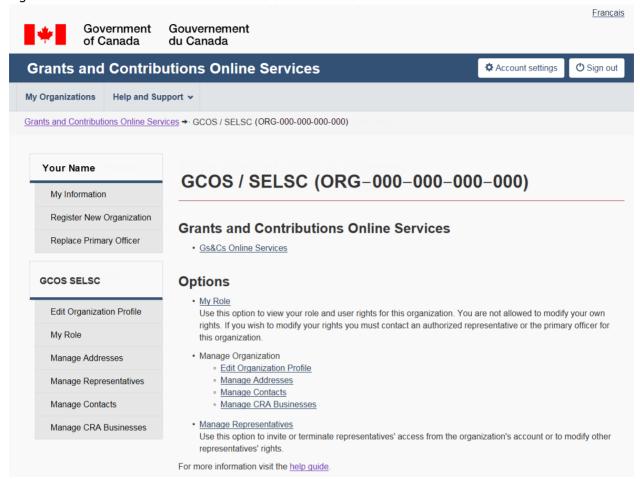


Figure 15 - Organization Identification screen Français Government of Canada Gouvernement du Canada Signed in as GCOS SELSC **Grants and Contributions Online Services** (Sign out Help and Support ♥ My Organizations **Organization Identification** In order to add an application, the following mandatory fields must be completed. Help and Support ESDC uses the information you provide in this section to establish your organization's identity. User Guides 🖸 Legal Name GCOS / SELSC Contact Us C Operating (Common) Name (if different GCOS / SELSC from legal name) 000000000RT0001 **Business or Registration Number** * Organization Type Help 0 * Year Established Help 0 E-mail Address * Telephone Number Area Cc Telephone N Ext. Extension

Q Show More

×

(Required)

The information in this section will identify the number of representatives that must agree to an item before it can be submitted to Employment and Social Development Canada and as such, the online system will prohibit the submission of items until these concurrences have been recorded. It is important to ensure that the equivalent number of representatives is granted "submit" access for the corresponding items as the number of required signatories identified in this section.

(Required)

Organization's Mandate (Maximum 4000 characters)

* How many signatures are required to submit an Application for Funding to ESDC? (Required)	Select V
* How many signatures are required to submit a Claim to ESDC? (Required)	Select
* How many signatures are required to submit a Forecast of Project Expenditures to ESDC? (Required)	Select 🗹
* How many signatures are required to submit an Activity Report to ESDC? (Required)	Select ▽
* How many signatures are required to submit an Agreement to ESDC? (Required)	Select V
Save Back To My Organizations	

4.1 Organization identification

Your legal name, operating name and business number are pre-filled and not editable.

- Complete all required fields under section Organization Identification.
- Please refer to next section for the Signatories section

4.2 SIGNATORIES

The information in this section will identify the number of representatives that must agree to an item before it can be submitted to Employment and Social Development Canada and as such, the online system will prohibit the submission of items until these concurrences have been recorded. It is important to ensure that the equivalent number of representatives is granted submit access for the corresponding items as the number of required signatories identified in this section.

- Select from the drop down menu the amount of signatories required for each item
- Click Save
- You will then be redirected to your GCOS account Welcome Screen. Visit the <u>Applications and project management Guide</u>

5. REPLACE THE PRIMARY OFFICER OF AN EXISTING ORGANIZATION

To replace an existing primary officer, you must first create yourself an account by following the steps in section 1.1 and section 1.2.1.

- Once you've created your profile, click on Replace Primary Officer from the Welcome Screen (Figure 16)
- Click Get Started (Figure 17)
- Enter your position title and, to identify the registered organization, you must enter the 15-digit Canada Revenue Agency (CRA) Business Number associated with the organization (i.e. XXXXXXXXXRP0001) or, provide the organization number (i.e. ORG-123-456-789-123) (Figure 18)
- Click Save
- If you've never been a primary officer of an organization in GCOS, you will need to validate your identity by following the steps outlined in section 2.2
- Once your Identity is validated, an authorization code is mailed to the organization (addressed to the chief executive officer) at the address on file.
- Follow the steps outlined in <u>section 3</u> to finalize the process.

Please note that if you use the Replace Primary Officer function, the current primary officer will no longer have access to the account; however will still be able to be invited as an organization representative, if necessary.

Figure 16 – Welcome screen

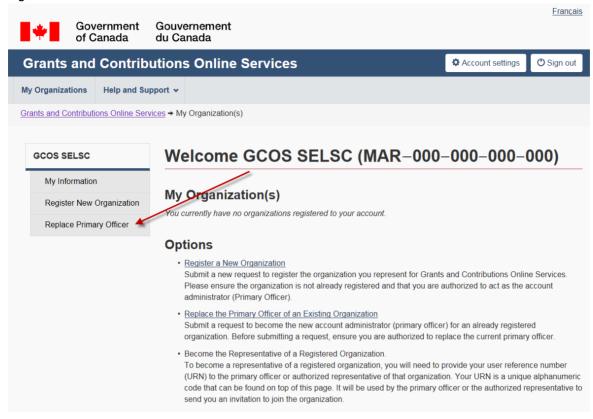


Figure 17 - Replace the Primary Officer of an Existing Organization screen

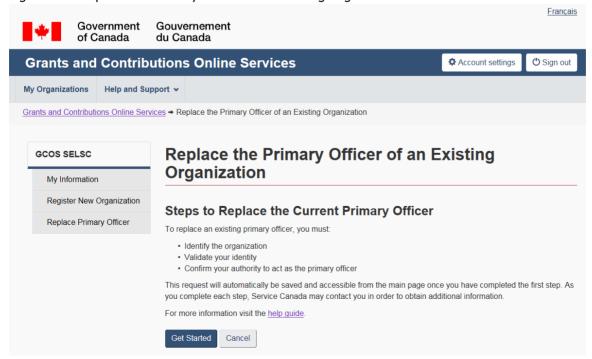


Figure 18 – Identify the Organization screen Government Gouvernement of Canada du Canada Account settings (Sign out **Grants and Contributions Online Services** My Organizations Help and Support ♥ Grants and Contributions Online Services → Identify the Organization Identify the Organization **GCOS SELSO** For more information on how your privacy is protected, please refer to our Personal Information Collection My Information Statement 3. Register New Organization To identify the registered organization, you must enter the 15-digit Canada Revenue Agency (CRA) Business Number associated with the organization (e.g., 123456789 AB 1234) or, provide the organization number (e.g., ORG-123-456-Replace Primary Officer Your Position Title: (required) Please enter one of the following CRA Business Number: Organization Number: For more information visit the help guide

6. RECOVER ACCESS TO YOUR EXISTING PROFILE

If you previously registered for a GCOS account but do not remember your username and password, it is possible to recover access to your existing profile by following these steps:

Create a new GCKey (see <u>Section 1.1.2</u>)

Save

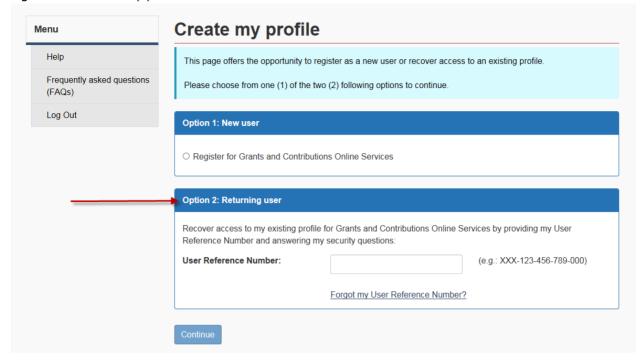
From the Create my profile screen (Figure 19), choose option 2

Cancel

- Enter your User Reference Number (URN) (Your URN would have been provided to you by email, when you initially registered for the GCOS account)
- Respond to three of the five security questions created when you initially set up your account

You may also wish to select "Replace the Primary Officer of an Existing Organization" on the "Welcome Screen". Replacing a Primary Officer is outlined in the Account Management User Guide. If you do not remember your URN and need to recover access to an existing profile, contact the Employer Contact Centre for support at 1-800-367-5693.

Figure 19 - Create my profile screen



7. EDIT YOUR PROFESSIONAL PROFILE

You may edit your professional profile at any time. Depending on the screen, either select My Information from the left side menu or select My GCOS Account from the top menu, and then select My User Account.

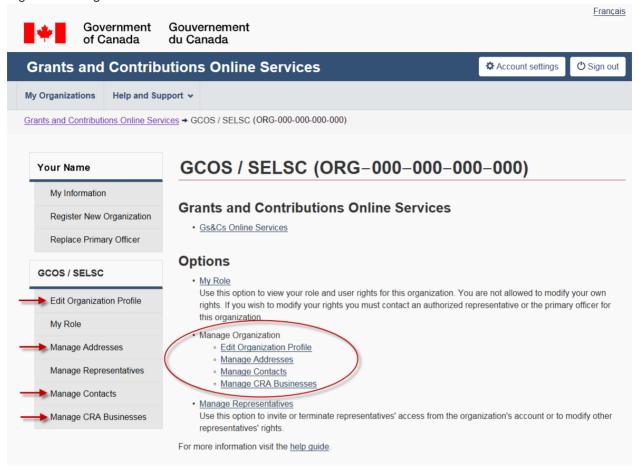
The information that you are able to edit includes: your preferred language, your Contact Information, your Address Information & Your Security Questions and Answers. Insure that you click Save at the bottom of the page to capture any modifications.

8. EDIT ORGANIZATION INFORMATION

From the organization's main screen (Figure 20) the Primary Officer and/or the representatives with organization administrative rights, are able to edit the organization account through a number of options:

- Edit Organization Profile
- Manage Addresses
- Manage Contacts
- Manage CRA Businesses

Figure 20 – Organization's main screen



8.1 EDIT ORGANIZATION PROFILE

- Click Edit Organization Profile (Figure 20), either from the left side menu or the hyperlink
- You will be able to modify the organization's default address
- · Click Save.

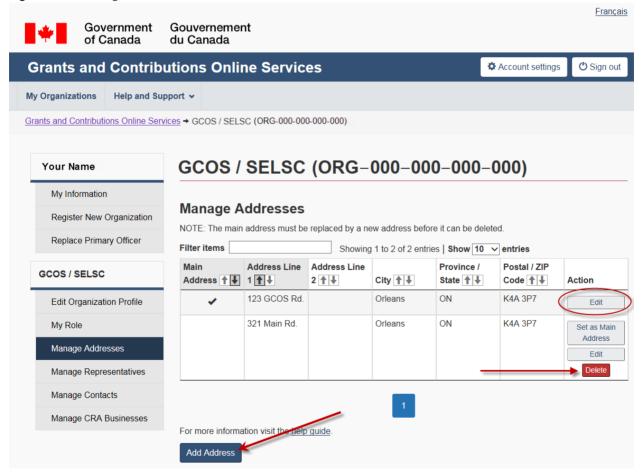
Note: Address updates will only be applied to future funding applications. It is necessary to contact your Project Officer to update the address on previously submitted applications or active projects.

8.2 Manage addresses

This function will allow you to build an address book from which you can select addresses associated to specific Applications for Funding

- Click Manage Addresses (Figure 20), either from the left side menu or the hyperlink
- To Modify an existing address:
 - Click Edit from the action column (Figure 21)
 - o Make the necessary modifications
 - Click Save
- To Add a new address:
 - Click Add Address (Figure 21)
 - Complete all required fields
 - Click Save
- To Delete an address (Note that the main address must be replaced by a new address before it can be deleted):
 - o Click Delete (Figure 21)
 - Confirm your choice by clicking delete on the pop-up message

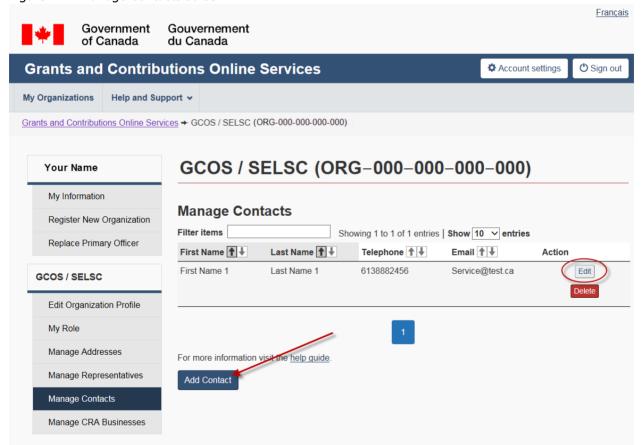
Figure 21 - Manage Addresses screen



8.3 Manage contacts

- Click Manage Contacts (Figure 20), either from the left side menu or the hyperlink
- To Modify an existing contact:
 - Click Edit from the action column (Figure 22)
 - Make the necessary modifications
 - Click Save
- To Add a new contact:
 - Click Add Contact (Figure 22)
 - o Complete all required fields
 - Click Save
- To Delete a contact:
 - Click Delete in the action column (Figure 22)
 - Confirm your choice by clicking delete on the pop-up message

Figure 22 – Manage Contacts screen



Note: Project-specific contacts can be added in GCOS per application in the Applications and Projects module.

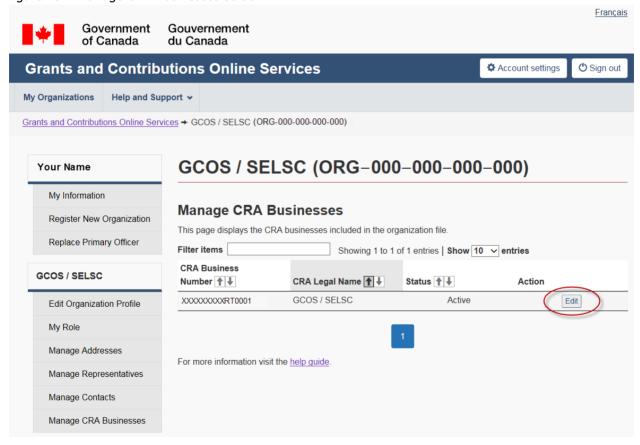
8.4 Manage CRA BUSINESSES

- Click Manage CRA Businesses (Figure 20), either from the left side menu or the hyperlink
- This screen displays the CRA businesses included in the organization file (Figure 23)
- Click Edit from the action column (Figure 23)

Note: The CRA business information cannot be modified through Service Canada however it is possible to select a default address or contact.

- You can edit the CRA Operating Name for your Organization
- Select from the drop down menu the default address and default contact
 - If information is not available for selection on this screen, the Primary Officer or authorized representative, must add it from within the applicable screen (see <u>Section 8.2</u> to add an address or <u>Section 8.3</u> to add contacts).
- Click Save

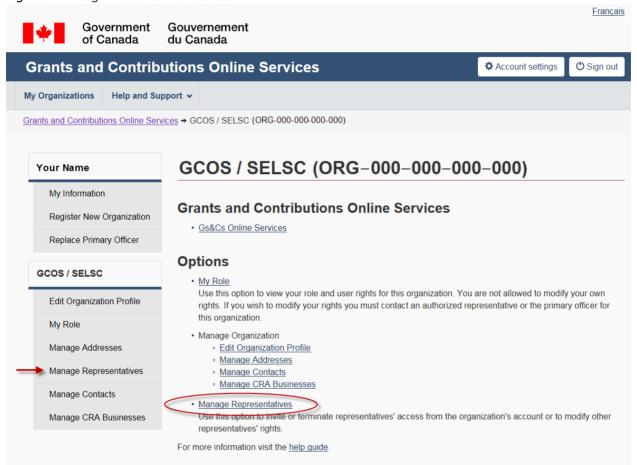
Figure 23 - Manage CRA Businesses screen



9. MANAGE REPRESENTATIVES

Use this option to invite or terminate representatives' access from the organization's account or to modify other representatives' rights.

Figure 24 – Organization's main screen



9.1 Invite representatives

- Click Manage Representatives (Figure 24), either from the left side menu or the hyperlink
- Click Invite Representative (Figure 25)
- Enter the representative User Reference Number (URN) (Figure 26)

Note: You can only invite a representative who has already created a user profile and has provided you with his/her user reference number (URN).

• Click Confirm if the correct information of the representative you are inviting appears on the screen (Figure 27)

Figure 25 – Manage Representatives screen

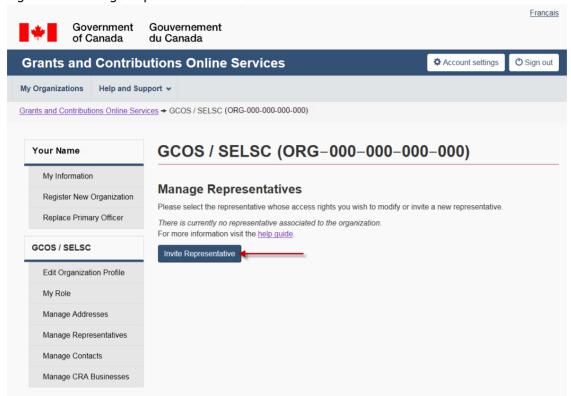
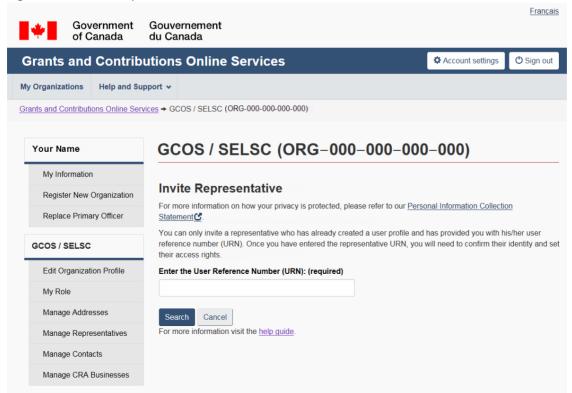


Figure 26 - Invite Representative screen



Government Gouvernement of Canada du Canada **Grants and Contributions Online Services** Account settings () Sign out My Organizations Help and Support ∨ Grants and Contributions Online Services → GCOS / SELSC (ORG-000-000-000) GCOS / SELSC (ORG-000-000-000) Your Name My Information **Invite Representative** Register New Organization For more information on how your privacy is protected, please refer to our Personal Information Collection Replace Primary Officer Statement 4 You can only invite a representative who has already created a user profile and has provided you with his/her user reference number (URN). Once you have entered the representative URN, you will need to confirm their identity and set GCOS / SELSC their access rights Edit Organization Profile Enter the User Reference Number (URN): (required) JON-000-000-000-000 My Role Manage Addresses Cancel Search Manage Representatives Prénom Nom Name: Manage Contacts User Reference Number: JON-000-000-000 Manage CRA Businesses Telephone: 613-987-6543 Info@Test.ca Email: If the information on this screen does not correspond to the representative you wish to invite please Cancel You must authenticate the identity of the representative before confirming the information on this screen. Confirm For more information visit the help guide

Figure 27 – Invite Representatives confirmation screen

9.2 REPRESENTATIVE RIGHTS

After confirming the identity of the representative to be invited, you will need to establish the representatives' rights within the organization. There are two types of representative rights:

- Organization Account Rights
- GCOS Function-specific Rights

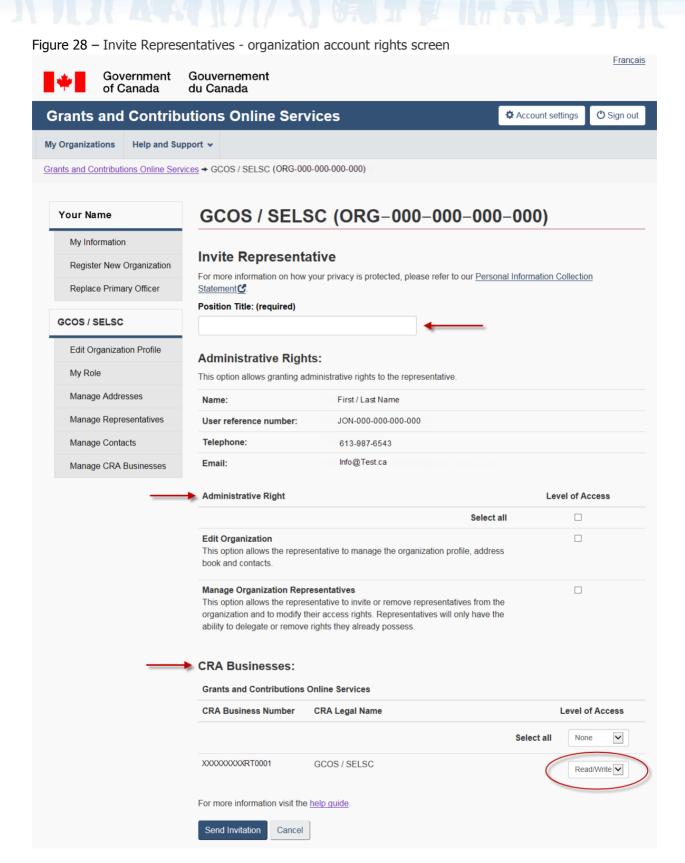
Organizational Account Rights are established at the time of inviting the new representative. The GCOS Function-specific Rights will be customized once the new representative has accepted the invitation to the join the organization and accessed GCOS. See Section 9.4 for GCOS Function-Specific Rights.

By default, users will have some access to specific functions depending on the organization account rights they were granted.

9.2.1 Organization account rights

The Organization account rights include administrative rights and CRA businesses rights (Figure 28).

- Enter the position title of the representative
- Select their level of access required
 - Administrative Rights:
 - Edit Organization:
 - Manage Organization Representatives
 - CRA Businesses Rights:
 - None No access to the business and will not see any information related to the business. No access to the Applications, Projects or Project Management items for this account
 - Read Read-only access to the business and will be given read-only access by default to GCOS for Applications, Projects and Project Management items. This can be modified by establishing function-specific rights as outlined in <u>section 9.4</u>
 - Read/Write Full access to view and amend GCOS information related to the business. Full access to create Gs&Cs items related to Applications, Projects and Project Management.
- Click Send Invitation



9.3 ACCEPTING PENDING REPRESENTATIVE INVITATION

To access the representative invitation the new user must log into their account. The organization that initiated the invitation will show a status of Pending User Acceptance. Complete the following steps to complete your representative invitation:

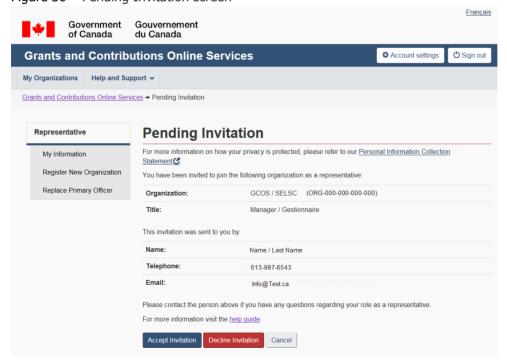
- Enter your username and password in GCOS
- Click on your Organization Name (Figure 29)
- Click Accept invitation (Figure 30)
- Click Gs & Cs Online Services
- Log out of GCOS

In order for the Primary Officer to customize the GCOS function-specific responsibilities of the representative, it is necessary to log out of the account.

Figure 29 - Welcome screen



Figure 30 - Pending Invitation screen



9.4 GCOS FUNCTION-SPECIFIC RIGHTS

If the function-specific rights are not assigned to a representative, the pending status will appear. Once the rights are assigned to the representative, the status Set will be displayed.

- Enter your username and password in GCOS
- Click your organization's name
- Click Gs&Cs Online Services
- Click My GCOS Account Included in the Top Menu
- Click Representatives (Figure 31)
- To allocate the rights to your representative or to modify the allocated rights of an existing representative:
 - o Find your representative in the list and click Edit
 - Select all the rights you would like to allocate to your representative (Figure 32)
 - Click on I agree and then Save

Figure 31 - My GCOS Account screen

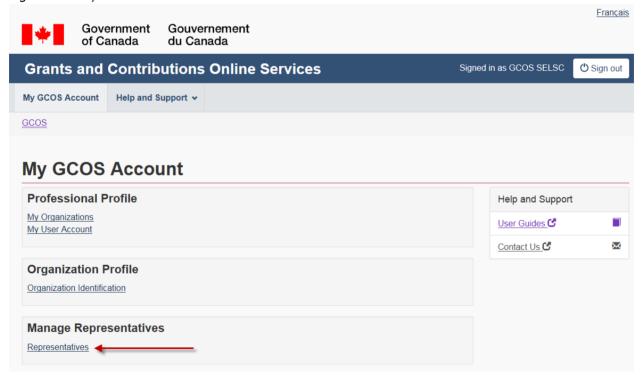
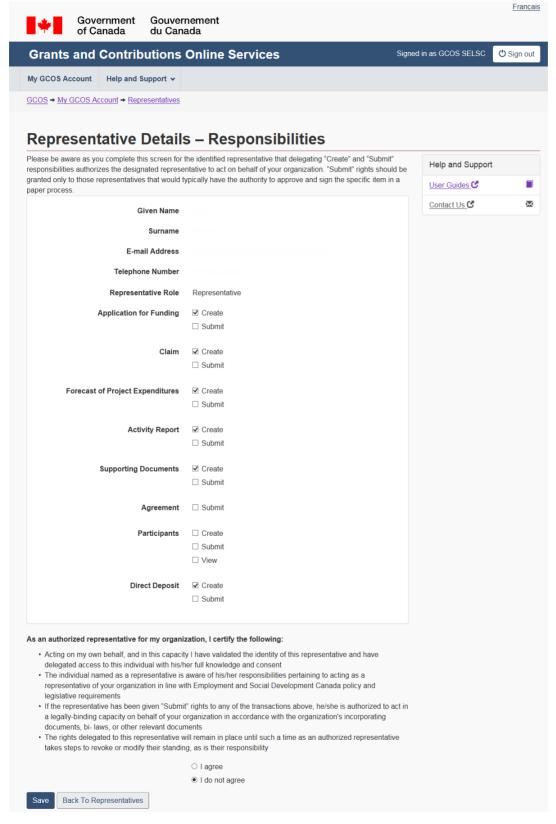


Figure 32 – Representative Details - Responsibilities screen

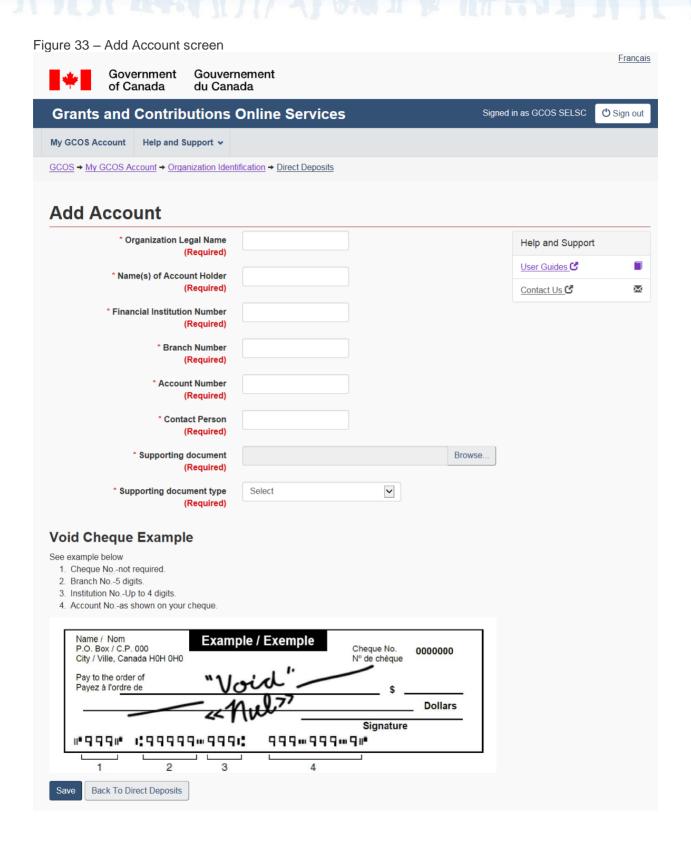


10. DIRECT DEPOSIT

The Direct Deposit screen is used to add, delete, or modify direct deposit accounts linked to the organization's account.

To upload a supporting document to the organization's account:

- Enter your username and password in GCOS
- Click your organization's name
- Click Gs&Cs Online Services
- Click My GCOS Account Included in the Top Menu
- Click Organization Identification
- Click Add Direct Deposit
- Click Yes, I Agree.
- Please note that if you disagree with the Privacy Notice Statement, you will not be able to add a direct deposit account.
- Complete all mandatory fields (Figure 33). A void cheque or a direct deposit document from your financial institution is required in the Supporting document field
- Once saved, the account will be available in the Select Account drop-down menu when adding a direct deposit request to an application for funding or an active project.



11. SUPPORTING DOCUMENTS

The Supporting Documents screen in the Organization Identification menu allows for uploading and storing of files that may be used to support an Application for Funding but do not vary based on the project (i.e.: patent letters, bylaws, etc.).

To upload a supporting document to the organization's account:

- Enter your username and password in GCOS
- Click your organization's name
- Click Gs&Cs Online Services
- Click My GCOS Account Included in the Top Menu
- Click Organization Identification
- Click Add Supporting Documents
- Enter the Document Title, Choose the Document Type and click on browse to find your file, once your file uploaded, Click Save (Figure 34).

Figure 34 – Supporting Documents screen

