GRANTS AND CONTRIBUTIONS ONLINE SERVICES:

USER GUIDE
(AGREEMENT E-SIGNATURE)

AUGUST 2015

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Important Things to Remember

A. TIME OUT FEATURE

GCOS has a timeout feature. After 20 minutes of account inactivity, GCOS will prompt you with a "*Message from webpage*" (see *Figure 1*) warning you that the session is about to expire. If the "*OK*" button is not clicked by the time indicated in the message, your GCOS account session will be terminated and you will need to log back into GCOS to continue.

Figure 1 – Time Out Warning Message
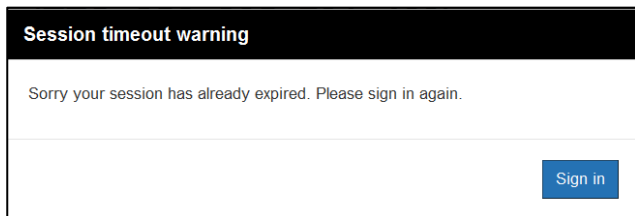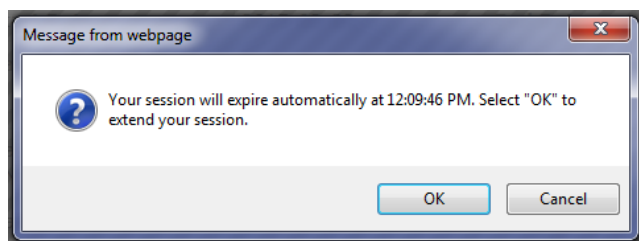
B. SAVING

GCOS does not automatically save information. It is important to remember to save often throughout each session.

C. REQUIRED FIELDS

While using GCOS, if you do not enter information into a "*required field*" and attempt to save or submit the item, an error message will appear (e.g. "Error *1: Must have one* "*Main Application Contact*" "). An incomplete "required field" will prohibit your ability to submit until you have entered information into this field.

D. QUESTIONS

Technical and non-technical questions can be submitted directly to the GCOS team using the "*Contact Us*" feature located at the top of the screen available from the business list (see *Figure 2*). Once you select your business, the "*Contact Us*" function will remain available at the top of each screen.

Figure 2 – Contact Us

1. Agreement

1.1 Notice of Agreement Ready for Signature

All representatives that have been granted the "*Submit*" responsibility for "*Agreement*" will be advised by e-mail when a funding agreement is ready for signature.

To view or modify representative responsibilities, you must access the "*GCOS*" menu available at the top of the screen and select the "*Representatives*" sub-menu (see *Figure 3*).

Figure 3 – Agreement Signatories

Following the approval of the submitted application through your GCOS account, an Employment and Social Development Canada (ESDC) representative will contact you to discuss the details of your project. Once finalized, each representative that has been assigned the "*Submit*" responsibilities for "*Agreement*" will receive an email including instructions on how to electronically sign the agreement (see *Figure 4*).

Figure 4 – Email sent to Signatories

| File | Message | Insert | Options | Format Text | Review |

From ▾	NA-GCOS-SELSC-GD@hrsdc-rhdcc.gc.ca
To...	dq@org.ca; director@org.ca; boardmember@org.ca
Cc...	
Bcc...	
Subject:	Action - Grants and Contributions Online Services (GCOS) - Agreement - Signature required: Youth 2015

Hello Mr. Family Name

You have been identified as an active Grants and Contributions Online Services (GCOS) user with legal signing authority for the Organization 123 – Organisme 123 contribution agreement with Employment and Social Development Canada.

Following the approval of the above noted project, the contribution agreement is now ready for review and signature.

In order to view and record the agreement signatures on behalf of your organization, please note the following steps:

1. Log into your GCOS account;
2. Access the "View List of Applications and Projects" screen;
3. Locate the project Youth 2015 and select "Sign Agreement" in the Functions column;
4. Select "Sign Agreement" – A review screen will be displayed with information specific to the project including a copy of the Agreement to be signed and the number of signatures required
   *Please note the first signatory from your organization who accesses the agreement must select the signature type whether it be electronic or manual;
5. Once you have reviewed the agreement and completed the declarations, a security question randomly selected from your Professional Profile will need to be correctly answered in order to capture your signature.

Please note that all signatories established for your organization will receive this notification and will be prompted to complete the same steps.

You can access your account by clicking on the following link: http://www.servicecanada.gc.ca/eng/epb/gcos/login.shtml

Thank you!
Grants and Contributions Online Services
http://www.servicecanada.gc.ca/eng/epb/gcos/login.shtml

1.2   Access the Agreement

Once you have selected your business (see *Figure 2*), you must click the "*View List of Applications*" link available on the "*Welcome*" screen (see *Figure 5A*) which will bring you to the "*Applications and Projects*" (see *Figure 5B*). To access the "*Agreement*" in GCOS, you must locate the project that has a "*Ready to Sign*" status (see *Figure 5B*) and click on the function "*Sign Agreement*". Once you have reached the "*Agreements*" screen, two options will be available to you (see *Figure 5C*):

1- View: allows you to view a draft version of the agreement
2- Sign: initiate the e-signature process

The "*Agreement*" screen provides a summary of all the agreements that have been signed for that specific project. The first column provides you with an "*Identifier*" (see *Figure 5C*) which is a digital number that can also be viewed on the top right corner of the agreement and referred to as the Agreement ID. This number will ensure that the agreement you sign is also the one that was sent by your assigned Program Delivery Staff at ESDC. Each agreement has its own identifier. If the identifier in the table on the "*Agreement*" screen is different than the one on the .pdf version of the agreement, please contact your ESDC Program Delivery Staff.

Figure 5 – Welcome screen – Applications and Projects

1.3 Signature Process

There are only two functions available on the "*Agreements*" screen (see *Figure 5C*). You can generate a .pdf version of the agreement by using the function "*View*" prior signing the agreement or after you have signed the agreement. You can initiate the signature process by using the "*Sign Agreement*" function (see *Figure 5C*). Once you are ready to initiate the signature process, you must first select a signature method. The signature method chosen will be applied to all other signatories of the account. You will have two options to choose from (see *Figure 6*):

- Electronic Signature
- Manual Signature

Figure 6 – Review & Sign - Signature Method

The first signatory accessing this screen will be provided instructions in the Information box regarding the selection of the signature method. Once the method has been selected, this message will no longer be displayed.

The section entitled "*Link to Document*" provides the user with the option to generate a .pdf version of the agreement. When a signature method hasn't been selected and saved, the link to the agreement is for viewing purposes only and will have the watermark "*Draft*" embedded in the document. Once the signature method has been selected, the corresponding watermark will be inserted when required.

The link "*Signatories*" can be expanded to display the number of signatures required to sign an agreement as identified by your organization in the "*GCOS Organization Identification*" screen (see *Figure 7*). The signature

process will be completed the number of signatories identified has been met. Each signatory will be displayed as well as the date they signed the agreement.

Figure 7 – Number of Signatories

1.3.1   Select a Signature Method

Electronic Signature

The option "*Electronic Signature*" will enable the agreement to be signed electronically through GCOS. This option reduces the time it takes to obtain all the required signatures from your organization as well as ESDC's. This environmentally friendly method reduces the amount of paper required to manage a project.

The agreement signature is considered completed and will be sent to the Department once the numbers of required signatories have completed the signature process.

Manual Signature

The option "*Manual Signature*" will allow you to print a copy of the agreement and obtain the number of required signatures before sending it to ESDC for signature. A draft version of the agreement without signatures will be available in your GCOS account at all times.

1.3.2   Confirmation of Signature Method

Once you have saved your signature method, you will be asked to confirm your choice. This is the last chance you have to change the signature method (see *Figure 8*). Following the confirmation, you will be required to contact ESDC to change the signature method.

Figure 8 – Confirmation of Signature Method

When you select "*No*", you will be brought back to the "*Review & Sign*" screen (see *Figure 6*) with the possibility to change the selected option.

When you select "*Yes*", the screen will refresh and you will now have the option to attest that you have reviewed the agreement and continue with the signature process (see *Figure 9*).

Figure 9 – Review and Sign - Certification

1.3.3   Revision of Agreement

In order to be able to certify that you have reviewed the agreement, you will be forced to click on the .pdf version of the agreement. To generate the agreement, you must have the free downloadable software Adobe Acrobat Reader. The .pdf document will be accessible at any time in your GCOS account.

Once you have had the opportunity to review the .pdf version of the agreement, the "*Sign Agreement*" button will now be enabled (see *Figure 10*).

Figure 10 – Review and Sign – Sign Agreement button

The "*Sign Agreement*" initiates the signature process specific for that user. To complete the process, each signatory will need to certify his authority to sign the agreement (see *Figure 11*) as well as answer a security question (see *Figure 12*). Once the required number of signatories has been reached, the other signatories are not required to confirm their authority to sign.

The "*Certification – Authority to Sign*" screen is only accessible for users that have the right to sign the agreement as identified in Figure 3.

Figure 11 – Certification - Authority to Sign

The "*Security Question/Acceptance of Agreement*" screen (see *Figure 12*) provides an additional security step prior to finalizing the official legal signature of the agreement. As only the user knows the answers to the security questions created when the account was set up. By clicking "*I Accept*", you are signing the Agreement and are agreeing on behalf of your organization to be bound by the Agreement.

Figure 12 – Security Question / Acceptance of Agreement

1.3.4 Confirmation of Agreement Signature

When more than one signature is required, the first signatory will receive a confirmation that his/her signature has been captured. He will also be informed that the agreement, signed by all required signatories, will be returned to the Department only once all the signatories have completed the required steps (see *Figure 13*).

Figure 13 – Confirmation – multiple signatures
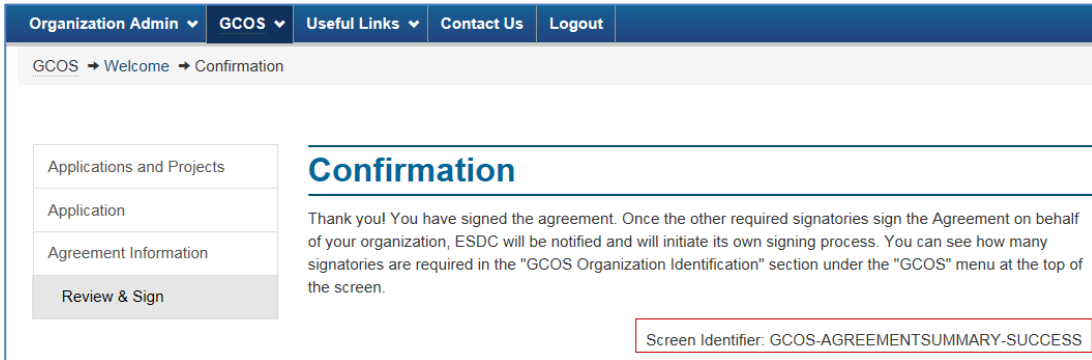
When the other signatories access the "*Review & Sign*" screen, they can view who has already sign the agreement by expanding the "*Signatories*" section (see *Figure 14*).

Figure 14 – Review & sign – viewing recorded signatures
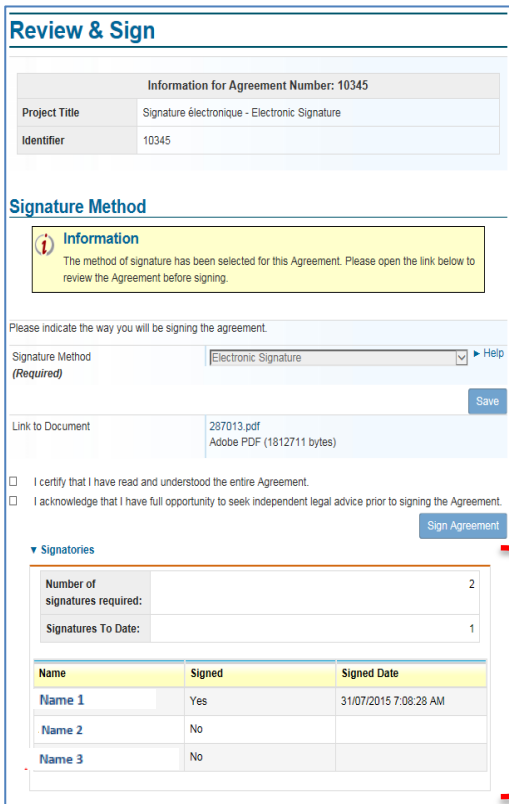
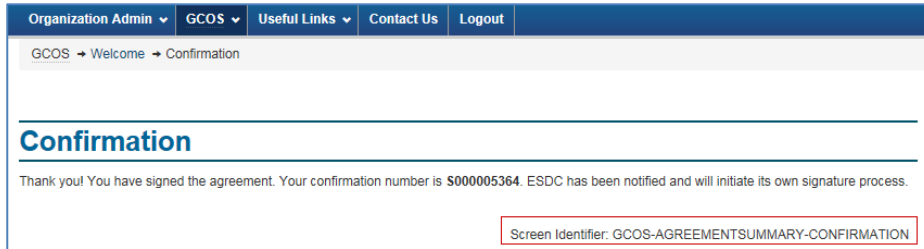The confirmation message will provide a confirmation number for reference (see *Figure 15*) to the last signatory or when only one signature is required. Once the tracking number is received, the agreement is successfully submitted to the Department to initiate its internal signature process.

Figure 15 – Confirmation and Tracking Number

Once the Department's internal signature process is complete, an email will be sent to the agreement signatories.

1.4 Consulting the Agreement

In order to view a copy of **the signed agreement** the following steps must be completed:

- Log in your account;
- Access the "*View Applications and Projects*" screen;
- Locate your active project and select "*Manage Agreement*" under the Functions column (see *Figure 16*).

You will then be able to user the "*View*" function to generate a .pdf version of the agreement. The document will have the watermark "*Copy only – electronic version*" and will also allow you to view who signed the agreement on behalf of your organization and the delegate on behalf of the Department.

Figure 16– Consulting the Agreement