Welcome

Kindly mute your line when not speaking.

Use the chat to ask questions, and we will answer them at the end.

Please respond to the poll via WebEx after the demo.
Agenda

1. Introduction
2. Overview
3. What’s New
4. Live Demo
5. Getting Started
6. Training
7. Q&A
8. Contact Information
Overview

MS Office Documents

FOAs/Lab Calls (eXCHANGE)

Email Messages

Offline processes

Excel Spreadsheets
What’s New: Application Submissions

Several new features make it easier than ever to complete the application submission process in the EERE Program Information Center

• **Allot additional time** to complete your concept paper and full application directly in the system

• Applicants complete the **SOPO and Budget Justification through web-based forms** (these will no longer be uploaded as attachments)

• **Interactive wizards** guide applicants through the application process

• Validations to **alert you when you’re missing information** that would prevent you from submitting your application

• Ability to **share all or portions of your application** with other users enabling collaboration for editing/submitting the application
What’s New: Registration

Step 1
AORs Registers the Organization
Organizations and their Authorized Organizational Representative (AOR) must register before individual account can be created (unless you are an “Individual” or a lab applicant)

Step 2
Designate an Account Administrator (optional)
AORs have the option of designating an Account Administrator (AA) to manage and approve user accounts

Step 3
Applicants Register in the EERE Program Information Center
Applicant accounts (Principal Investigator, Business POC, or Technical POCs) will be pending until they are approved by account administrators before you can begin an application in response to an open opportunity

Step 4
AOR/AAs Approve User Accounts
AORs or their designated AA approve or deny applicant accounts for their organization. Once approved, applicants can begin using the EERE Program Information Center

Early registration is encouraged to ensure your organization is able to submit applications by the submission deadlines!
Registration Walkthrough
Registration: Provide Personal Information

- **First Name:** Amy
- **Last Name:** Smith
- **Primary Email:** AM@email.com
  - Send
- **Enter Validation Code:** 12345
  - Validate
- **Secondary Email:**
- **Phone Number:** (202)-123-4567
- **Account Affiliation:**
  - DOE Federally Funded Research and Development Center (FFRDC)
  - Individual
  - Industry, Academia, Non-Profit, Federal/State/Local Government
  - National Energy Technology Laboratory (NETL) – Award and Project Administrators
## Registration: Account Affiliation

### Account Affiliation Description

<table>
<thead>
<tr>
<th>Account Affiliation</th>
<th>Description</th>
<th>AOR/AA</th>
<th>Applicant</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOE Federally Funded Research and Development Center (FFRDC)</td>
<td>The user will select this option if they are associated with one of the DOE National Labs (e.g., Ames Laboratory, Livermore National Laboratory). If the registrant is a NETL user that is an applicant, they should use this affiliation as well.</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Individual</td>
<td>The user will select this option if they are representing their own organization. For example, this option would be selected if the user is a self-employed individual.</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Industry, Academia, Non-Profit, Federal / State /Local Government</td>
<td>The user will select this option if they are an employee of commercial or government organizations that are not associated with DOE (e.g., Dept of Transportation, IBM, George Mason University).</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>National Energy Technology Lab (NETL) - Award and Project Administrators</td>
<td>The user will select this option if they are associated with NETL as an award and/or project administrator.</td>
<td>✓</td>
<td>✓</td>
</tr>
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<td>Applicant</td>
</tr>
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<td>---------------------------------------------------------</td>
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<td>✔</td>
<td>✔</td>
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Registration: Industry, Academia, Non-Profit, Federal/State/Local Government

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<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

Provide Personal Information
- First Name: [External]
- Last Name: [User]
- Primary Email: ExUser@gmail.com [Valid]
- Secondary Email: 
- Phone Number: 
- Account Affiliation: Industry, Academia, Non-Profit, Federal/State/Local Government
Why is the Authorized Organization Representative (AOR) not on this list?

An AOR is determined automatically by matching user’s email to a pre-defined list of individuals that have already been designated as an FFRDC’s AOR or a POC in SAM.gov. An AOR will see the role displayed and selected based on their designation.
Registration: Password Setup

* New Password:

* Confirm Password:

- Password must contain at least 12 characters;
- Password must contain a non-numeric in the last position;
- Password must contain a combination of letters, numbers, and at least one allowed special character;
- Password cannot have same letter/number/character more than 4 times;
- Password cannot have 4 consecutive keys from the keyboard;
- Password must not contain the email address;
- Allowed special characters are: ! # $ % & ( ) * + - ; : = ? @ _ \ ^ \"
What do I need for MFA?
Users need a smart phone, and if scanning an EERE Program Information Center QR code, a smart phone that can download apps and has a camera.

What is the difference between the two options?
• **SMS**: Short Message Service (SMS) is the most widely-used type of text messaging. When you receive a text message on your phone, you are using SMS.

• **Phone App**: This method requires you to download an *authenticator app* to your phone. When you use the app, it generates a code that will be entered into the EERE Program Information Center. Although more steps to install and use, using a phone authenticator app to generate your MFA code can be more secure than using SMS because text messages are not encrypted and can be intercepted.
# Registration: Submit

<table>
<thead>
<tr>
<th>First Name:</th>
<th>Sample</th>
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<tbody>
<tr>
<td>Last Name:</td>
<td>Applicant</td>
</tr>
<tr>
<td>Primary Email:</td>
<td><a href="mailto:SA@gmail.com">SA@gmail.com</a></td>
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<tr>
<td>Secondary Email:</td>
<td></td>
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<tr>
<td>Phone Number:</td>
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## ORGANIZATION DETAILS

<table>
<thead>
<tr>
<th>Organization Name:</th>
<th>Tantus Technologies, Inc.</th>
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<tbody>
<tr>
<td>Address:</td>
<td>1735 N Lynn St Ste 650, Arlington, Virginia, 22209, United States</td>
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<tr>
<td>Phone Number:</td>
<td>not provided</td>
</tr>
<tr>
<td>Fax Number:</td>
<td>not provided</td>
</tr>
<tr>
<td>Authorized Organization Representative:</td>
<td>PARKASH KESWANI</td>
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<tr>
<td></td>
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<tr>
<td></td>
<td>not provided</td>
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<table>
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<th>Account Affiliation:</th>
<th>Industry, Academia, Non-Profit, Federal/State/Local Government</th>
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<tr>
<td>Selected Roles:</td>
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<table>
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<td>NAICS Code:</td>
<td>541330</td>
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<td>Delinquent on Federal Debt:</td>
<td>false</td>
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<tr>
<td>Doing Business As:</td>
<td>Congressional District: VA 06</td>
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Live Demo
Getting Started

Attend Training
Training begins for applicants in October and will cover the process of registering for an account, managing users accounts (for AORs and AAs) and submitting applications.

Register for an Account
Registration for AORs and AAs will open on October 1. Organizations and their authorized official (from Sam.gov) will need to register in EPIC before individual applicant accounts can be approved.

Apply for Funding
Applications submissions for FY21 (and FY22 Lab Calls) will open on November 2, 2020. All announcements published after this date will be posted in the EERE Program Information Center. Open opportunities published prior to will be managed in eXCHANGE.
Live training will begin in October and instruct attendees how to register, manage accounts, and apply to opportunities.

- Classroom trainings will continue on a periodic schedule
- On-demand trainings, videos, and quick guides will be available within the Training Materials section of the Help Center
- Training schedule will be posted in the EERE Program Information Center on October 1.

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Audience</th>
<th>Training Begins</th>
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<tr>
<td>Registration and Managing Accounts for Authorized Organizational Representatives (AOR) and Account Administrators (AA)</td>
<td>AORs, AAs</td>
<td>October</td>
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<tr>
<td>EERE Program Information Center Overview and Registration</td>
<td>Applicants, AORs, AAs</td>
<td>November</td>
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<tr>
<td>Applying to Opportunities (FOAs, NOTAs, NOIs, and RFIs)</td>
<td>Applicants, AORs, AAs</td>
<td>November</td>
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<td>Applying to Lab Calls</td>
<td>Applicants, AORs, AAs</td>
<td>November</td>
</tr>
</tbody>
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Questions and Answers
Contact Us

Contact the EERE Program Information Center Helpdesk

Email: eere-epichelpdesk@ee.doe.gov
Phone: 202-287-6956
Hours: Monday-Friday, 9 a.m.-6 p.m. Eastern Time