What you'll need to get started

Primary Contact
An organization official needs to be identified as the OMS administrator. since the primary contact has full read/write permissions, they should be the one performing the self-registration and setup, creating the organization profile and list of contacts, and serving as CyberGrants point-of-contact should questions arise regarding the organization's OMS system.

Official organization name
The name documented with a federally-governed agency such as the Internal Revenue Service in the United States, Her Majesty's Revenue and Customs in the United Kingdom, or the Canada Revenue Agency.

Official organization address
The address documented with a federally-governed agency such as the Internal Revenue Service in the United States, Her Majesty's Revenue and Customs in the United Kingdom, or the Canada Revenue Agency.

Tax exempt status code (if applicable)
For example, in the United States the tax status code might be 501(c)(3).

Organization email address

Organization phone number(s)

Official identification numbers
Employee Identification Number [EIN] for organizations in the United States, Business Number [BN] for organizations in Canada, and the Charity Registration Number for organizations in the United Kingdom

Organization's logo
JPG, GIF or PNG file formats are supported

Program(s) Information
List of programs that the organization fiscally sponsors.The name(s), phone number(s), address(es), contact(s), and description(s).

Other contacts
Identify the name, title, email address, phone number, fax number, and address details of all individuals in the organization who will serve as corporate liaisons. These are the individuals that the OMS team will contact should a question arise regarding a donation from a particular corporate client. A user's email address will serve as their login ID and will be used to send invitations and notifications. As you set up each contact in OMS, please be sure to identify their read/write or read-only permission level and identify which program(s) a contact should be associated with (for more information, see the OMS User guide).

If your organization has received funds from an Easymatch client(s) in the last 2 years

Use the following informational details from any one of the clients to demonstrate a prior relationship with Easymatch. In other words, the details used to access Easymatch portals.

Client Name, Account Number, ID Number, Password

consivaOMS

SELF-REGISTRATIONCHECKLIST